

Application for Federal Assistance SF-424

*** 1. Type of Submission:**

- ☐ Preapplication
☒ Application
☐ Changed/Corrected Application

*** 2. Type of Application:**

- ☒ New
☐ Continuation
☐ Revision

*** If Revision, select appropriate letter(s):**

*** Other (Specify):**

*** 3. Date Received:**

Completed by Grants.gov upon submission.

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:**

Policy Studies Associates, Inc.

*** b. Employer/Taxpayer Identification Number (EIN/TIN):**

52-1265755

*** c. UEI:**

LWCMDE3HEWN4

d. Address:

*** Street1:**

1120 20th Street NW

Street2:

Suite 200N

*** City:**

Washington

County/Parish:

*** State:**

DC: District of Columbia

Province:

*** Country:**

USA: UNITED STATES

*** Zip / Postal Code:**

20036-3414

e. Organizational Unit:

Department Name:

Division Name:

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

Prefix:

*** First Name:**

Leslie

Middle Name:

*** Last Name:**

Anderson

Suffix:

Title:

Co-Owner and Principal

Organizational Affiliation:

Policy Studies Associates, Inc.

*** Telephone Number:**

2029395327

Fax Number:

*** Email:**

landerson@policystudies.com

Application for Federal Assistance SF-424

* 9. Type of Applicant 1: Select Applicant Type:

R: Small Business

Type of Applicant 2: Select Applicant Type:

Type of Applicant 3: Select Applicant Type:

* Other (specify):

* 10. Name of Federal Agency:

Department of Education

11. Assistance Listing Number:

84.283

Assistance Listing Title:

Comprehensive Centers

* 12. Funding Opportunity Number:

ED-GRANTS-050826-001

* Title:

Office of Elementary and Secondary Education (OESE): Program and Grantee Support Services:
Comprehensive Centers Program, Assistance Listing Number 84.283B

13. Competition Identification Number:

84-283B2026-1

Title:

Comprehensive Centers Program

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

Add Attachment

Delete Attachment

View Attachment

* 15. Descriptive Title of Applicant's Project:

Region 3 (Mid-Atlantic) Comprehensive Center: Building State and Local Capacity in Math and
Literacy through Intensive, Client-Driven Technical Assistance.

Attach supporting documents as specified in agency instructions.

Add Attachments

Delete Attachments

View Attachments

Application for Federal Assistance SF-424**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="2,271,525.00"/>
* 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="2,271,525.00"/>

*** 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 in attachment.)**☐ Yes ☒ No

If "Yes", provide explanation and attach

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 18, 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:

**U.S. Department of Education Supplemental Information for the SF-424
Application for Federal Assistance**

OMB Number: 1894-0007
Expiration Date: 04/30/2026

1. Project Director and Applicable Entity Identification Numbers:

Prefix:	* First Name:	Middle Name:	* Last Name:	Suffix:
<input type="text"/>	<input type="text" value="Jeanine"/>	<input type="text"/>	<input type="text" value="Hildreth"/>	<input type="text"/>

* Project Director Level of Effort (percentage of time devoted to grant):

Address:

* Street1:	<input type="text" value="1120 20th Street NW"/>
Street2:	<input type="text" value="Suite 200N"/>
* City:	<input type="text" value="Washington"/>
County:	<input type="text" value="DC"/>
* State:	<input type="text" value="DC: District of Columbia"/>
* Zip Code:	<input type="text" value="20036-3414"/>
* Country:	<input type="text" value="USA: UNITED STATES"/>

* Phone Number (give area code) Fax Number (give area code)

<input type="text" value="2029395326"/>	<input type="text"/>
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* Email Address:

Alternate Email Address:

OPE ID(s) (if applicable)

NCES School ID(s) (if applicable)

NCES LEA/School District ID(s) (if applicable)

2. General Education Provision Act Section 427 Assurance:

☒ I assure that the proposed project complies with the requirements in section 427 of the General Education Provisions Act (**20 U.S. C. 1228a**). Compliance can be found on the following page(s) of the application:

3. New Potential Grantee:

☒ N/A. This item is not applicable because the program competition's notice inviting applications (NIA) does not include a definition "New Potential Grantee." This item is not applicable when the program competition's NIA does not include the definition.

For NIA's that include a definition of "New Potential Grantee," complete the following:

Are you a new potential grantee as defined in the program competition's NIA?

☐ Yes ☐ No



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

OMB Number: 1894-0008
Expiration Date: 08/31/2026

Name of Institution/Organization

Policy Studies Associates, Inc.

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)	Project Year 6 (f)	Project Year 7 (g)	Total (h)
1. Personnel	569,281.00	586,359.00	603,950.00	622,069.00	640,731.00			3,022,390.00
2. Fringe Benefits	272,230.00	280,397.00	288,809.00	297,473.00	306,397.00			1,445,306.00
3. Travel	24,218.00	18,385.00	18,385.00	18,385.00	22,045.00			101,418.00
4. Equipment	0.00	0.00	0.00	0.00	0.00			0.00
5. Supplies	2,500.00	2,575.00	2,652.00	2,732.00	2,814.00			13,273.00
6. Contractual	0.00	0.00	0.00	0.00	0.00			0.00
7. Construction	0.00	0.00	0.00	0.00	0.00			0.00
8. Other	1,242,476.00	1,216,082.00	1,207,184.00	1,200,987.00	1,171,653.00			6,038,382.00
9. Total Direct Costs (lines 1-8)	2,110,705.00	2,103,798.00	2,120,980.00	2,141,646.00	2,143,640.00			10,620,769.00
10. Indirect Costs *Enter Rate Applied:	0.15	137,510.00	139,940.00	142,863.00	147,612.00			728,744.00
11. Training Stipends	0.00	0.00	0.00	0.00	0.00			0.00
12. Total Costs (lines 9-11)	2,271,524.00	2,241,308.00	2,260,920.00	2,284,509.00	2,291,252.00			11,349,513.00

***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 and provide a copy of your Indirect Cost Rate Agreement:

Indirect Cost Rate Agreement: Add Attachment Delete Attachment View Attachment

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

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

The approved Indirect Cost Rate is %. The approved Indirect Cost Rate Base (e.g., Modified Total Direct Costs, Salaries and Wages, or Salaries, Wages and Fringe Benefits see 34 CFR § 75.564(b))

(3) If this is your first Federal grant, and you do not have an approved indirect cost rate agreement, are not a State or Local government that receives more than \$35 million in direct Federal funding, and are not funded under a training rate program or a restricted rate program, do you want to use the de minimis rate of 15% MTDC?

☒ Yes ☐ No If yes, you must comply with the requirements of 2 CFR § 200.414(f).

(4) If you do not have an approved indirect cost rate agreement, do you want to use the temporary rate of 10% of budgeted salaries and wages?

☐ Yes ☐ No If yes, you must submit a proposed indirect cost rate agreement within 90 days after the date your grant is awarded, as required by 34 CFR § 75.560.

(5) 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 75.564(c)(2)?

The Restricted Indirect Cost Rate is %. The approved Indirect Cost Rate Base (e.g., Modified Total Direct Costs, Salaries and Wages, or Salaries, Wages and Fringe Benefits see 34 CFR § 75.564)

(6) For Training Rate Programs (check one) -- Are you using a rate that:

☐ Is based on the training rate of 8 percent of MTDC (See 34 CFR §75.562(c)(4))? Or, ☐ Is included in your approved Indirect Cost Rate Agreement, because it is lower than the training rate of 8 percent of MTDC (See 34 CFR §75.562(c)(4))?

Name of Institution/Organization		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.									
Policy Studies Associates, Inc.											
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)	Project Year 6 (f)	Project Year 7 (g)	Total (h)			
1. Personnel											
2. Fringe Benefits											
3. Travel											
4. Equipment											
5. Supplies											
6. Contractual											
7. Construction											
8. Other											
9. Total Direct Costs (lines 1-8)											
10. Indirect Costs *Enter Rate Applied:											
11. Training Stipends											
12. Total Costs (lines 9-11)											
SECTION C - BUDGET NARRATIVE (see instructions)											

Name of Institution/Organization		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.
Policy Studies Associates, Inc.		

IF APPLICABLE: SECTION D - LIMITATION ON ADMINISTRATIVE EXPENSES

(1) List administrative cost cap (x%):

(2) What does your administrative cost cap apply to? ☐ (a) indirect and direct costs or, ☐ (b) only direct costs

Budget Categories	Project Year 1 (a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Project Year 6 (f)	Project Year 7 (g)	Total (h)
1. Personnel Administrative	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2. Fringe Benefits Administrative	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3. Travel Administrative	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4. Contractual Administrative	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5. Construction Administrative	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
6. Other Administrative	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
7. Total Direct Administrative Costs (lines 1-6)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
8. Indirect Costs *Enter Rate Applied:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
9. Total Administrative Costs	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
10. Total Percentage of Administrative Costs	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

BUDGET NARRATIVE

Region 3 Comprehensive Center (R3CC)

Comprehensive Centers Program | Assistance Listing 84.283B | FY 2026

Policy Studies Associates, Inc.

Policy Studies Associates, Inc. (PSA) requests \$2,271,968 in Year 1 to establish and operate the Region 3 Comprehensive Center (R3CC), serving Delaware, the District of Columbia, Maryland, New Jersey, and Pennsylvania over a 60-month project period. Annual costs range from \$2,240,920 in Year 2 to \$2,290,259 in Year 5, and total \$11,347,799 over five years. All five annual totals fall within the \$2,293,378 annual award ceiling established for the Region 3 Comprehensive Center. The budget covers PSA personnel and fringe (Lines 1–2), project travel (Line 3), supplies (Line 5), and, on Line 8, three subgrant agreements with SRI International, NORC at the University of Chicago, and the Education Policy and Leadership Center (EPLC), together with other direct costs and the required 5% emerging-needs set-aside. Indirect costs are charged at 15% of Modified Total Direct Costs (MTDC) under the de minimis rate provision of 2 CFR § 200.414(f). All costs are necessary, reasonable, and allocable to the project under the cost principles at 2 CFR part 200, subpart E. Figures are rounded to whole dollars; a row or column total may differ from the sum of its rounded components by \$1–2.

Budget Summary

Line Item	Year 1	Year 2	Year 3	Year 4	Year 5	5-Year Total
1. Personnel (PSA prime staff)	\$569,281	\$586,359	\$603,950	\$622,069	\$640,731	\$3,022,390
2. Fringe Benefits (47.82%)	\$272,230	\$280,397	\$288,809	\$297,473	\$306,397	\$1,445,307
3. Travel	\$24,585	\$18,064	\$18,064	\$18,064	\$21,224	\$100,001
4. Equipment	\$0	\$0	\$0	\$0	\$0	\$0
5. Supplies	\$2,500	\$2,575	\$2,652	\$2,732	\$2,814	\$13,273
6. Contractual	\$0	\$0	\$0	\$0	\$0	\$0
7. Construction	\$0	\$0	\$0	\$0	\$0	\$0
8. Other (subgrants + ODC + 5% set-aside)	\$1,242,498	\$1,216,063	\$1,207,164	\$1,200,968	\$1,171,604	\$6,038,297
9. Total Direct Costs	\$2,111,094	\$2,103,458	\$2,120,639	\$2,141,306	\$2,142,770	\$10,619,267
10. Indirect Costs (15% of MTDC)	\$160,874	\$137,462	\$139,892	\$142,815	\$147,489	\$728,532
11. Training Stipends	\$0	\$0	\$0	\$0	\$0	\$0
12. Total Request	\$2,271,968	\$2,240,920	\$2,260,531	\$2,284,121	\$2,290,259	\$11,347,799

Line 1: Personnel

Line 1 covers salaries for PSA-employed personnel only. Compensation for subgrant partner personnel (SRI, NORC, EPLC) is included in their respective subgrant amounts on Line 8. Under PSA's established compensation policy, salaries are adjusted each year effective October 1, coinciding with the anticipated project start date. The Year-1 salaries shown reflect each individual's salary at the time of this application as adjusted by the 3% cost-of-living increase that will be in effect at award start, applied consistently across federal and non-federal awards per 2 CFR § 200.430; each subsequent project year reflects an additional 3% cost-of-living adjustment effective October 1. Grant-charged amounts equal each individual's FTE commitment multiplied by the applicable annual salary.

Name	Center Role	FTE	Annual Salary (Yr 1)	Grant-Charged (Yr 1)
<i>Co-Project Directors</i>				
Jeanine Hildreth	Co-Project Director — Operations & External Coordination	0.50	\$174,688	\$87,344
Brian Eyer	Co-Project Director — Services & Quality	0.50	\$177,160	\$88,580
<i>State Co-Leads</i>				
Christina Russell	Delaware State Co-Lead	0.30	\$189,520	\$56,856
Yvonne Woods	District of Columbia State Co-Lead	0.25	\$135,960	\$33,990
Tiara Booker-Dwyer	Maryland State Co-Lead	0.30	\$177,160	\$53,148
Leslie Anderson	New Jersey State Co-Lead	0.30	\$189,520	\$56,856
Jennifer Bitzer	New Jersey State Co-Lead	0.30	\$109,180	\$32,754
<i>Technical Specialists</i>				
Julie Meredith	Technical Specialist — Literacy & Assessment	0.20	\$140,080	\$28,016
Mollie Rubin	Technical Specialist — Leader Pipelines	0.20	\$133,900	\$26,780
Dan Aladjem	Technical Specialist — School Improvement & Turnaround	0.20	\$185,400	\$37,080
<i>Operations & Evaluation</i>				
Derek Riley	Center Evaluator	0.20	\$177,160	\$35,432
Diana Joyce	Communications & Operations Lead	0.25	\$129,780	\$32,445
Total — Year 1 (Line 1 Personnel)				\$569,281

Co-Project Directors

Jeanine Hildreth (Co-Project Director, Operations & External Coordination; 0.50 FTE; Maryland resident) and Brian Eyer (Co-Project Director, Services & Quality; 0.50 FTE; Maryland resident) together satisfy Program Requirement 10, with combined FTE of 1.0. Dr. Hildreth leads external coordination, joint advisory board engagement with REL Mid-Atlantic, and Center operations. Dr. Eyer leads service-delivery quality, annual service plan development, and internal review; quality assurance across the three service tiers is carried within his Services & Quality role rather than as a separate budgeted position.

State Co-Leads

PSA State Co-Leads are Christina Russell (Delaware; 0.30 FTE), Yvonne Woods (District of Columbia; 0.25 FTE), Tiara Booker-Dwyer (Maryland; 0.30 FTE), Leslie Anderson (New Jersey; 0.30 FTE), and Jennifer Bitzer (New Jersey; 0.30 FTE). Each State is served by a co-lead pair; the SRI-employed co-leads for the District of Columbia and Maryland, the NORC-employed co-leads for Delaware and Pennsylvania, and the EPLC co-lead for Pennsylvania are budgeted within their respective subgrants (Line 8).

Technical Specialists

Julie Meredith (Literacy & Assessment), Mollie Rubin (Leader Pipelines), and Dan Aladjem (School Improvement & Turnaround) are budgeted at 0.20 FTE each as PSA-employed technical specialists — three of the Center's nine technical specialists. The remaining six specialists, employed by SRI (three) and NORC (three), are budgeted within their respective subgrants (Line 8); together the nine commit 1.80 FTE as described in the Management Plan.

Operations & Evaluation

Derek Riley (Center Evaluator; 0.20 FTE) leads internal evaluation, performance-data collection, and reporting. His effort represents the primary budget allocation for the data-collection activities required by the Program Performance Measures data plan, including client-satisfaction tracking (Performance Measure 1), evidence of practice change (Performance Measure 2), and annual performance reporting to the Department. Diana Joyce (Communications & Operations Lead; 0.25 FTE) manages communications, scheduling, and Center operations. Editorial and production support is provided through PSA's standing production staff and absorbed in PSA's organizational base; consistent with the Management Plan, it is a Center-level function carried outside the keyed personnel commitments and is not directly charged to the award.

Line 2: Fringe Benefits

PSA applies a composite fringe benefit rate of 47.82% to all direct salaries charged to federal awards, consistent with PSA's established compensation practices under 2 CFR § 200.431. Line 2 equals Line 1 multiplied by 47.82% for each project year. Fringe costs for subgrant partner personnel are embedded in the Line 8 subgrant amounts.

Line Item	Year 1	Year 2	Year 3	Year 4	Year 5	5-Year Total
Line 1 — Personnel	\$569,281	\$586,359	\$603,950	\$622,069	\$640,731	\$3,022,390
Fringe Rate	47.82%	47.82%	47.82%	47.82%	47.82%	
Line 2 — Fringe Benefits	\$272,230	\$280,397	\$288,809	\$297,473	\$306,397	\$1,445,307

Line 3: Travel

PSA is headquartered in Washington, DC. The majority of R3CC staff — except for the Center Evaluator (Oregon), the Communications & Operations Lead (Florida), and one New Jersey co-lead (New Jersey) — are based in the DC area and therefore do not incur lodging or per diem costs for meetings held at PSA offices or at the U.S. Department of Education. Travel under Line 3 reflects only those staff who require transportation and lodging to attend the annual R3CC all-staff meeting and other DC-based convenings, plus State site visits. Line 3 covers travel for PSA employees only; travel for subgrant partner personnel is included within their respective subgrant amounts on Line 8. All costs are estimated under PSA's Business Travel Policy, which sets GSA per diem rates as the maximum for lodging and M&IE, reimburses ground transportation by privately owned vehicle (POV) at \$0.725 per mile (CY2026, GSA Bulletin FTR 26-02), and limits airfare to the lowest available coach-class fare. Conference registration fees, which are not travel costs, are budgeted under Line 8, under Other and cross-referenced to the conference travel budgeted here.

Travel varies by year with planned activity. Year 1 includes one-time State in-person kickoff meetings. State site visits are budgeted at four trips per State per year in every year of the project, sustaining intensive on-site engagement through closeout rather than tapering in the final years. Conference attendance increases in Year 5 to reflect opportunities to present findings and disseminate products at the close of the project.

Two structural features keep the Line 3 total modest even though on-site engagement runs at full strength throughout. First, because most R3CC staff reside in the States they serve, the majority of on-site work carries no Line 3 cost. Second, because partner site work is funded within the Line 8 subgrants, Line 3 reflects only incremental PSA travel and understates the Center's total on-site presence. The Center funds four site visits per State in every year — full intensity sustained through the final year, consistent with its embedded, on-site delivery model — with Year 5 rising further for end-of-project dissemination travel. The modest Line 3 figure reflects resident presence and cost-effectiveness, not reduced engagement.

Year 1 — State Kickoff Meetings (\$6,521)

PSA will conduct one in-person kickoff meeting in each Region 3 jurisdiction in Year 1 to establish working relationships and service and performance-management plans. Two PSA staff travel by POV to each State requiring overnight travel; DC incurs no travel cost. The Center Evaluator (Oregon) attends by coach-class airfare.

State Partner Site Visits — \$11,540/yr (four visits per State, all five years)

PSA staff travel to Delaware, Maryland, New Jersey, and Pennsylvania is budgeted at four visits per State per year in every year of the project, with two PSA staff traveling by POV from PSA's Washington, DC office. Per diem is calculated at GSA standard CONUS rates (lodging \$110/night; M&IE \$68/day, at 75% on travel days). Round-trip mileage: Maryland 160 miles, Delaware and New Jersey 200 miles, Pennsylvania 260 miles. At four trips × two staff, annual per-State travel is: Delaware \$2,856; Maryland \$2,624; New Jersey \$2,856; Pennsylvania \$3,204 (\$11,540 per year combined), held at full intensity in all five years consistent with the Center's embedded, on-site delivery model. No travel is budgeted for the District of Columbia, one of the five R3CC jurisdictions, because PSA's DC State Co-Lead is locally based and all in-person work in DC is conducted at no transportation cost to the grant.

REL Mid-Atlantic Joint Advisory Board — \$642/yr

Two PSA staff attend one meeting per year with the REL Mid-Atlantic joint advisory board, expected to be located within Region 3. Staff travel independently by POV. Per person: 150 miles round trip at \$0.725/mile (\$109) + one night lodging at the GSA standard CONUS rate (\$110) + M&IE on two travel days at 75% of the CONUS rate ($2 \times \$51 = \102) = \$321; total for two staff, \$642.

Annual R3CC All-Staff Meeting — \$1,934/yr

PSA convenes one R3CC all-staff meeting annually at its Washington, DC office. Three out-of-area staff require travel: Center Evaluator (Oregon) airfare \$450 + lodging \$200 + M&IE \$138 = \$788; Communications & Operations Lead (Florida) airfare \$350 + lodging \$200 + M&IE \$138 = \$688; New Jersey co-lead (Amtrak \$120 + lodging \$200 + M&IE \$138 = \$458). Total \$1,934. DC lodging is budgeted at the non-standard area rate (\$200/night); M&IE \$92/day at 75% on travel days.

National Comprehensive Center Meeting — Center Evaluator — \$788/yr

PSA budgets travel for the Center Evaluator from Oregon to Washington, DC once per year (airfare \$450 + lodging \$200 + M&IE \$138 = \$788) to support participation in National Center-coordinated activities and evaluation, consistent with Program Requirement 5.

Professional Conferences — \$3,160/yr (Years 1–4); \$6,320 (Year 5)

PSA budgets for staff to attend two professional conferences per year in Years 1–4, and four in Year 5 to disseminate accumulated lessons. Per traveler per conference: airfare \$400 + lodging \$220 (2 nights at GSA CONUS) + M&IE \$170 = \$790.

Travel Category	Year 1	Year 2	Year 3	Year 4	Year 5	5-Year Total
State kickoff meetings — all five jurisdictions (Yr 1 only)	\$6,521	—	—	—	—	\$6,521
State partner site visits — Delaware	\$2,856	\$2,856	\$2,856	\$2,856	\$2,856	\$14,280
State partner site visits — Maryland	\$2,624	\$2,624	\$2,624	\$2,624	\$2,624	\$13,120
State partner site visits — New Jersey	\$2,856	\$2,856	\$2,856	\$2,856	\$2,856	\$14,280
State partner site visits — Pennsylvania	\$3,204	\$3,204	\$3,204	\$3,204	\$3,204	\$16,020
REL Mid-Atlantic Joint Advisory Board	\$642	\$642	\$642	\$642	\$642	\$3,210
Annual R3CC all-staff meeting (3 out-of-area staff)	\$1,934	\$1,934	\$1,934	\$1,934	\$1,934	\$9,670
National Comprehensive Center meeting — Center Evaluator	\$788	\$788	\$788	\$788	\$788	\$3,940
Professional conferences (2/yr; 4 in Yr 5)	\$3,160	\$3,160	\$3,160	\$3,160	\$6,320	\$18,960
Total Travel	\$24,585	\$18,064	\$18,064	\$18,064	\$21,224	\$100,001

Line 4: Equipment

PSA requests no equipment funds and will use existing organizational infrastructure and equipment to support R3CC operations. Line 4 = \$0 for all project years.

Line 5: Supplies

Line 5 covers project-specific consumable materials. PSA budgets \$2,500 in Year 1 for technical-assistance supplies and materials used directly in capacity-building activities, escalating at 3% annually beginning in Year 2. General office supplies are recovered through the indirect cost rate and are not direct-charged.

Line Item	Year 1	Year 2	Year 3	Year 4	Year 5	5-Year Total
Line 5 — Supplies	\$2,500	\$2,575	\$2,652	\$2,732	\$2,814	\$13,273

Line 6: Contractual

Line 6 is \$0 for all project years. Subgrant costs for SRI, NORC, and EPLC are reported on Line 8 — Other, consistent with Department guidance distinguishing subawards from contracts.

Line 7: Construction

Construction funds are not authorized under this program. Line 7 = \$0 for all project years.

Line 8: Other Direct Costs

Line 8 includes three components: (1) subgrant agreements with SRI International, NORC at the University of Chicago, and EPLC; (2) other direct costs, comprising printing, website, and conference registration fees; and (3) the required 5% emerging-needs set-aside. Each component is detailed below, and the Line 8 Total table consolidates all three.

Subgrants

SRI, NORC, and EPLC are subrecipients under 2 CFR § 200.331(a), performing substantive programmatic work using project funds to carry out the R3CC's purpose. Under 34 CFR § 75.708(b) and (c), PSA as grantee may award subgrants to entities identified in an approved application. Each annual subgrant amount covers the subrecipient's direct and indirect costs for that project year. Each subgrant amount was developed in consultation with the subrecipient based on a detailed budget the subrecipient provided to PSA; PSA has reviewed each and confirmed that the amounts reflect the partner's institutional salaries and fringe rates, the FTE levels of assigned personnel, travel estimated consistent with Federal cost principles, and the partner's federally negotiated indirect cost rate. This provides a reasonable basis for the subgrant totals shown.

SRI International — \$500,000/yr (Years 1–4); \$485,000 (Year 5)

SRI International provides State co-lead capacity and technical-specialist expertise in the District of Columbia and Maryland. The subgrant covers salaries and fringe for SRI's DC co-lead (0.20 FTE) and Maryland co-lead (0.20 FTE), three technical specialists (0.60 FTE combined), and estimated travel for in-State activities, plus indirect computed under SRI's federally negotiated indirect cost rate agreement (NICRA) with its cognizant Federal agency. The Year-5 reduction to \$485,000 reflects reduced subrecipient scope as PSA assumes greater closeout responsibilities and SRI's direct State engagement decreases in the final year.

NORC at the University of Chicago — \$500,000/yr (Years 1–4); \$485,000 (Year 5)

NORC at the University of Chicago provides State co-lead capacity in Delaware and Pennsylvania. The subgrant covers salaries and fringe for NORC's Delaware co-lead (0.20 FTE) and Pennsylvania co-lead (0.20 FTE), three technical specialists (0.60 FTE combined), and estimated travel for in-State activities, plus indirect computed under NORC's NICRA with its cognizant Federal agency. The Year-5 reduction to \$485,000 reflects reduced subrecipient scope during the planned sustainability transition.

Education Policy and Leadership Center (EPLC) — \$75,000/yr

EPLC provides Pennsylvania-specific policy expertise and State co-lead capacity. EPLC's Pennsylvania co-lead (0.40 FTE; Pennsylvania resident) leads the Pennsylvania State relationship. The \$75,000 annual amount, fixed across all five years, covers the co-lead's salary and fringe and EPLC's applicable costs.

Subrecipient	Year 1	Year 2	Year 3	Year 4	Year 5	5-Year Total
SRI International	\$500,000	\$500,000	\$500,000	\$500,000	\$485,000	\$2,485,000
NORC at the University of Chicago	\$500,000	\$500,000	\$500,000	\$500,000	\$485,000	\$2,485,000
Education Policy and Leadership Center	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$375,000
Subgrant Subtotal	\$1,075,000	\$1,075,000	\$1,075,000	\$1,075,000	\$1,045,000	\$5,345,000

Other Direct Costs

Printing and document production covers client-facing materials and knowledge products (\$1,500 in Year 1, escalating 3% annually). The website line covers development, hosting, and maintenance of the R3CC's public-facing website, the Center's primary platform for communicating with stakeholders and distributing knowledge products. Year-1 costs (\$50,000) cover domain registration and hosting setup, initial design and development, content population, and an initial Section 508 accessibility review. Costs are estimated from market rates for comparable website development and compliance work; a vendor has not yet been selected and will be identified through PSA's established procurement procedures following award. Years 2–5 (\$25,000; \$15,000; \$7,500; \$5,000) reflect ongoing hosting, periodic structural updates, and annual Section 508 compliance audits and remediation. The declining curve reflects the front-loaded nature of design and development, with maintenance and compliance costs stabilizing once the site is established; all knowledge products are produced to meet Section 508 accessibility standards. Conference registration fees correspond to the professional conferences budgeted under Line 3 (\$2,400 in Year 1, escalating 3% through Year 4; \$5,402 in Year 5, reflecting doubled conference attendance for end-of-project dissemination).

Line Item	Year 1	Year 2	Year 3	Year 4	Year 5	5-Year Total
Printing and document production	\$1,500	\$1,545	\$1,591	\$1,639	\$1,688	\$7,963
Website development / maintenance & 508	\$50,000	\$25,000	\$15,000	\$7,500	\$5,000	\$102,500
Conference registration fees	\$2,400	\$2,472	\$2,546	\$2,623	\$5,402	\$15,443
Other Direct Costs Subtotal	\$53,900	\$29,017	\$19,138	\$11,762	\$12,091	\$125,907

5% Emerging-Needs Set-Aside

Application Requirement 7 requires a discrete annual set-aside of five percent of the grant amount to support emerging needs consistent with the project's intended outcomes. PSA budgets the set-aside so that it equals exactly five percent of the total grant amount in each project year; equivalently, the set-aside equals 5/95 of the sum of total direct costs (excluding the set-aside) and indirect costs, which avoids the circularity of charging the set-aside against itself. Consistent with the definition of MTDC at 2 CFR § 200.1, the set-aside is excluded from the indirect cost base, and no indirect cost is charged on it. The set-aside is not pre-committed to any specific activity or cost category; these funds may be deployed across any allowable budget category consistent with ED guidance and approval, and when expended will be classified by their nature in the applicable category.

Line Item	Year 1	Year 2	Year 3	Year 4	Year 5	5-Year Total
5% Emerging Needs Set-Aside	\$113,598	\$112,046	\$113,027	\$114,206	\$114,513	\$567,390

Line 8 Total

The table below consolidates the three components above into the Line 8 total reported on ED Form 524.

Line Item	Year 1	Year 2	Year 3	Year 4	Year 5	5-Year Total
Subgrants (SRI + NORC + EPLC)	\$1,075,000	\$1,075,000	\$1,075,000	\$1,075,000	\$1,045,000	\$5,345,000
Other Direct Costs (ODC)	\$53,900	\$29,017	\$19,138	\$11,762	\$12,091	\$125,907
5% Emerging Needs Set-Aside	\$113,598	\$112,046	\$113,027	\$114,206	\$114,513	\$567,390
Line 8 — Total Other Direct Costs	\$1,242,498	\$1,216,063	\$1,207,164	\$1,200,968	\$1,171,604	\$6,038,297

Line 10: Indirect Costs

PSA does not hold a negotiated indirect cost rate agreement with a Federal cognizant agency and elects the 15% de minimis rate on Modified Total Direct Costs (MTDC) under 2 CFR § 200.414(f), as amended October 2024. Office space and general administrative costs are recovered through this rate and are not direct-charged. PSA will comply with all recordkeeping requirements under 2 CFR § 200.414(f).

PSA elects the de minimis rate pursuant to the October 2024 revision to 2 CFR § 200.414(f), which expanded eligibility for the de minimis rate to non-Federal entities (with limited exceptions) and set 15% of MTDC as the applicable rate for awards executed on or after October 1, 2024. The same revision increased the subaward threshold in the MTDC definition from \$25,000 to \$50,000 per subaward; PSA applies the revised \$50,000 threshold in computing MTDC exclusions for SRI, NORC, and EPLC.

MTDC is computed as defined at 2 CFR § 200.1. From total direct costs (excluding the 5% set-aside), MTDC includes the first \$50,000 of each subaward once over the life of the subaward and excludes the remainder. Because each subaward's first \$50,000 is included in Year 1, the full subaward amount is excluded in Years 2–5. The 5% emerging-needs set-aside is not included in the MTDC base.

MTDC Component	Year 1	Year 2	Year 3	Year 4	Year 5	5-Year Total
Total Direct Costs (excluding 5% set-aside)	\$1,997,496	\$1,991,413	\$2,007,613	\$2,027,099	\$2,028,257	\$10,051,878
Less: subaward amount excluded from MTDC	(925,000)	(1,075,000)	(1,075,000)	(1,075,000)	(1,045,000)	(5,195,000)
MTDC Base	\$1,072,496	\$916,413	\$932,613	\$952,099	\$983,257	\$4,856,878
De Minimis Rate	15%	15%	15%	15%	15%	
Line 10 — Indirect Costs	\$160,874	\$137,462	\$139,892	\$142,815	\$147,489	\$728,532

Applied to an MTDC base that excludes the large majority of subgrant dollars, PSA's 15% de minimis rate produces total indirect of \$728,532 and an effective indirect rate of approximately 6.4% of the total award, which is well below the 15% ceiling, concentrating Federal funds on direct service.

Cost-Effectiveness and Service-Tier Costs

PSA operated the Region 4 Comprehensive Center in the same Mid-Atlantic region under the 2019–2024 program cycle, and the staffing model, compensation levels, and operational cost structure proposed here are drawn from that experience. Compensation reflects PSA's established salary schedule, which is consistent with market rates for research and technical-assistance professionals with comparable qualifications in the Washington, DC metropolitan area and is applied consistently across federal and non-federal awards per 2 CFR § 200.430. Fringe at 47.82% reflects PSA's composite rate.

The staffing model reduces cost relative to comparable scope. State co-leads who are residents of or embedded in their assigned States reduce travel expenditure and accelerate the relationship-building that supports intensive technical assistance. Subgrant amounts for SRI and NORC were developed in consultation with each organization, reflect each organization's salaries, fringe, estimated travel, and other direct costs under its NICRA, and are consistent with prevailing rates for federally funded technical-assistance work of equivalent scope; EPLC's engagement at \$75,000 per year is consistent with the scope of the Pennsylvania co-lead role.

As required by Application Requirement 5, the table below allocates estimated Year-1 total project costs across the three service tiers. Allocations are based on estimated staff effort and activity mix, informed by PSA's prior Comprehensive Center operations and the service model in the Project Narrative.

Service Tier	Primary Activities	% of Budget	Est. Yr 1 Cost
Intensive	On-site, sustained SEA/LEA partnerships; Co-Project Director engagement; subgrant partner State presence; senior staff time	60%	\$1,363,181
Targeted	Multi-client convenings, cross-State learning communities, facilitated working sessions, communities of practice	30%	\$681,591
Universal	Knowledge products, website, newsletters, policy briefs, one-time webinars	10%	\$227,197

Intensive services (60%) account for the largest share, consistent with the Regional Center role, reflecting the concentration of Co-Project Director time, State co-lead engagement, subgrant partner State presence, and in-region travel in individualized, on-site work with SEA teams. Targeted services (30%) cover multi-client convenings, cross-State learning communities, and communities of practice; universal services (10%) cover knowledge products, the R3CC website, newsletters, and one-time webinars. Year-1 allocations are representative of the project-wide distribution, which is expected to remain consistent across all five years. All proposed costs are allowable under 2 CFR part 200, subpart E (revised October 2024); office space and general administrative overhead are recovered through the de minimis indirect rate and are not direct-charged.



JUNE 2026

APPLICATION FOR THE REGION 3 COMPREHENSIVE CENTER

Assistance Listing Number 84.283B

SUBMITTED TO:
Office of Elementary and Secondary Education
U.S. Department of Education

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Competitive Preference Priority: Returning Education to the States

Policy Studies Associates (PSA) addresses the Competitive Preference Priority, **Returning Education to the States**, which makes eligible entities “identified, designated, or endorsed by a Governor or chief State education official for purposes of implementing the project.” PSA is such an entity: the chief State education officials of the jurisdictions this Center would serve have endorsed PSA to carry out the work on their behalf.

The project is endorsed by chief State education officials to implement it

The Center serves five State educational agencies — Delaware, the District of Columbia, Maryland, New Jersey, and Pennsylvania — and its agenda belongs to them: the chiefs set it and PSA carries it out under their endorsement. Chief State education officials across the region are providing Letters of Designation/Endorsement naming PSA to implement the project on their behalf — the basis on which it qualifies under this priority.

Why this project returns education to the States

The endorsement is not a formality; it reflects how the Center is designed to operate. The project returns education to the States in three concrete ways:

- **The States set the agenda.** This Regional Center arrives with no pre-set program. Each State names the problems it most wants to solve, and PSA builds an annual, State-approved service plan around them, working from the State’s own learning agenda and data. Section B.5 and the State service plans document how.
- **The work builds the State’s own capacity, then hands off.** PSA’s tiered model moves capacity into the hands of SEA staff as the work proceeds, and the tools, routines, and expertise are built to stay once the partnership ends (logic model, B.6; long-term outcomes, B.1).

- **The track record proves States keep the capacity.** PSA ran this Center from 2019 to 2024, and in State after State the work left something the State still uses: Pennsylvania kept a school-improvement facilitator model going after PSA trained the facilitators and built procedures to sustain it; the Public School Superintendents' Association of Maryland now sustains its first strategic plan in 74 years; and New Jersey runs the Maximizing Federal Funds resource as its own.

This, in the end, is a project run for the States, endorsed by their chief education officials, and built to hand capacity and authority back to them — what the Competitive Preference Priority asks for.

(a). Significance

Policy Studies Associates, Inc. (PSA) proposes to operate the Region 3 (Mid-Atlantic) Comprehensive Center (R3CC), providing intensive, client-driven, capacity-building technical assistance to the SEAs, regional and local educational agencies, and schools of Delaware, the District of Columbia, Maryland, New Jersey, and Pennsylvania. This is not new ground: from 2019 to 2024 PSA operated the Mid-Atlantic Comprehensive Center under the region's prior Region 4 designation, so a funded R3CC would open the 2026–2031 period already knowing each State — its leadership, priorities, and work in progress — and be productive in months rather than spending a year getting oriented. This section presents the data on the region's educational challenges and opportunities, then demonstrates the project's likely capacity to build local, State, and regional capacity for underserved populations, drawing on five years of documented R4CC outcomes across these five jurisdictions.

(a)(1). The Issue to Be Addressed: Data on Mid-Atlantic Educational Needs

The five Mid-Atlantic jurisdictions educate roughly 4.2 million students across about 7,250 schools, with a concentration of high-need communities that justifies intensive Federal capacity-building. The most pressing challenges cluster around four issues aligned with the FY2026 Absolute Priority's math-and-literacy emphasis: persistent gaps in early literacy and mathematics achievement, elevated chronic absenteeism, educator shortages in shortage-area subjects and high-need schools, and the demand on SEAs to deploy historic new investments effectively across high-poverty and rural communities.

These needs were identified through structured needs-sensing conversations in each jurisdiction with senior State leaders — chiefs of staff, assistant state superintendents, division directors, statewide superintendent- and intermediate-unit-association directors, and a district superintendent — supplemented by each State's strategic plan, accountability data, and assessment results. Grounding the case in direct conversation with the officials who set and execute State priorities, rather than national statistics alone, is what lets the Center target each State's most pressing, self-identified needs.

Literacy and Mathematics Achievement

The most direct evidence of the math-and-literacy need is each State’s own assessment data. In **Delaware**, third-grade ELA proficiency on the Smarter Balanced assessment **fell from 52 percent in 2019 to 38 percent in 2025**, prompting the 2025–2028 Delaware Early Literacy Plan requiring Science of Reading training and high-quality materials for all K–3 educators. **New Jersey**, serving 1.4 million students across 590 districts, has prioritized science-of-reading core instruction under Commissioner Laux and is expanding high-impact tutoring under S.2591. **Maryland** is implementing the Blueprint and has prioritized high-quality instructional materials across ELA, math, science, and social studies. **Pennsylvania**, under Secretary Rowe, has named structured literacy a top priority alongside the strengthened adequacy formula adopted after the 2023 Commonwealth Court funding ruling. The **District of Columbia** places literacy and mathematics among the five core priorities of its 2026–2030 strategic plan, with emphasis on K–12 outcomes and birth-through-five early learning.

Across the region, math and literacy are simultaneously the highest-priority instructional challenges and the areas where SEAs have framed the clearest needs. On the **2024 NAEP**, eighth-grade reading/mathematics proficiency stood at 23%/19% in Delaware and 25%/20% in the District of Columbia, against national rates of 30%/28%; Maryland was above the national mark in reading (33%) but below in mathematics (25%). New Jersey and Pennsylvania post averages at or above national marks, but their need is one of **concentration**: Pennsylvania carries the region’s most schools identified for improvement (647) and New Jersey 171 (Exhibit 1), clustered in high-poverty urban systems — on the 2024 NAEP just **15 percent of Philadelphia eighth-graders** were proficient in mathematics, less than half the State’s 31 percent; in **Newark**, 27 and 42 percent met expectations in mathematics and ELA on the 2024–25 NJSLA, against statewide rates near 41 and 53. Internationally, U.S. 15-year-olds trailed the OECD average in mathematics on the 2022 PISA (465 vs. 472). These shortfalls arrive alongside opportunity: every jurisdiction is moving a major reform into implementation — Maryland’s Blueprint, Pennsylvania’s strengthened adequacy formula, New Jersey’s record funding, Delaware’s

first funding overhaul in 80+ years, and the District’s 2026–2030 plan. The binding constraint is no longer State will or funding but the **capacity to convert investment into classroom results** — precisely what a Regional Center exists to build.

Chronic Absenteeism

Chronic absenteeism is a named priority in every Mid-Atlantic State, and the region spans a wide range relative to the national rate of about 23 percent (2023–24): **14 percent in New Jersey and 21 percent in Delaware** at or below the national figure, **27 percent in Maryland and 37 percent in the District of Columbia** well above it, and **Pennsylvania at 23 percent**. That spread — acute in dense urban systems — is itself part of the case for a Regional Center, since the support each SEA needs differs by where it stands. Absenteeism belongs in a math-and-literacy case because chronically absent students miss the instruction that builds proficiency. Delaware ties it to graduation rates and elementary-grade concentration; the District names attendance in its 2026–2030 plan and has appointed an OSSE attendance coordinator; Maryland and Pennsylvania treat it as a barrier to instructional recovery. Where a State has made progress, a Regional Center can help share what works across State lines.

Educator Shortages

Each State faces educator shortages with distinct local profiles but a common Federal capacity-building need. Delaware’s Teacher Residency Program has expanded faster than funding, and the State is not producing teachers at the rate needed, particularly in secondary education. New Jersey’s workforce has held steady in aggregate but faces acute shortages in multilingual-learner, computer-science, and special-education programs, and new certifications now run below the number of teachers leaving — the ratio of provisional certifications to departures fell from **three-to-one in 2013–14 to one-to-one by 2022–23** (Douglas et al., 2024). Pennsylvania has named educator recruitment, preparation, and retention a Commonwealth priority, with attention to STEM and diversity. Maryland is implementing the Blueprint’s educator-pipeline provisions across 24 systems and saw **superintendent vacancies in**

more than half its districts between 2022 and 2024. The through-line for the Absolute Priority is the same: shortages of teachers and of the leaders who sustain instructional improvement are, at bottom, shortages of the capacity to deliver strong literacy and mathematics instruction.

Underserved Populations and High-need Schools

ETAA section 203(e) requires Comprehensive Centers to prioritize schools serving high percentages or numbers of students from low-income families, including in rural and urban areas and those receiving Title I assistance; LEAs with high percentages or numbers of low-income school-age children; and schools implementing comprehensive or targeted support and improvement under ESEA section 1111(d). The Mid-Atlantic presents a concentrated case for that prioritization.

Exhibit 1 shows the total number of schools identified for improvement (CSI, TSI, and ATSI under ESEA section 1111(d)) in each jurisdiction. Across all five, the region has roughly 1,304 identified schools (Pennsylvania and Maryland hold the largest shares) — a population the R3CC is statutorily required to prioritize, and one PSA has direct working experience with in every State.

Exhibit 1. Schools Identified for Improvement in Mid-Atlantic Region

Jurisdiction	Total Number of Identified Schools	Percent of all schools
Delaware	50	25%
District of Columbia	22	9%
Maryland	414	29%
New Jersey	171	7%
Pennsylvania	647	22%
Mid-Atlantic TOTAL	1,304	18%

Source: State accountability reports, most recent year available. Identification methodologies, especially for TSI and ATSI, vary by state ESSA plan, so these counts indicate the magnitude of the priority population rather than relative state performance.

Beyond identified-school counts, the underserved population the R3CC serves includes students in high-poverty Title I schools region-wide, students in small rural districts on Maryland’s Eastern Shore

and across Pennsylvania’s 29 intermediate units, multilingual learners across New Jersey, and students in the highest-need urban LEAs — Newark, Camden, Trenton, Philadelphia, Pittsburgh, Baltimore, Washington, and Wilmington.

State-led investments and the case for Federal capacity-building support, now

Each Mid-Atlantic SEA is mid-way through significant new State-led investments that require focused capacity-building to translate into classroom results: Pennsylvania is directing strengthened-adequacy dollars to high-need districts after the 2023 Commonwealth Court ruling; New Jersey has set a record K–12 investment and is moving to fully fund its formula for the first time since 2008; Maryland is in active Blueprint implementation; Delaware has begun its first comprehensive funding reform in more than 80 years; and the District is implementing its 2026–2030 strategic plan, including graduate-profile-driven graduation requirements.

These are not steady-state agencies. Each is undertaking substantial change at the very moment Federal capacity-building support is most consequential. The Mid-Atlantic case is distinctive: high-need populations concentrated in both dense urban and rural settings, active State leadership with priorities aligned to the FY2026 Absolute Priority, and historic State-led investments that must land effectively in classrooms serving students with the greatest need.

(a)(2). Project Capacity to Build State and Regional Capacity for Underserved Populations

The proposed project is highly likely to build local, State, and regional capacity to provide, improve, sustain, and expand services for underserved populations — a likelihood that rests on something concrete. From 2019 to 2024, as the Mid-Atlantic Comprehensive Center under its prior Region 4 designation, PSA did exactly this capacity-building work across these same five jurisdictions and documented what it produced in each. R3CC would not start from a baseline; it would extend capacity it has already built.

The Center’s performance against the program’s own measures is one concrete body of that evidence. Across 2019–2024, R4CC met its Department-approved targets every year and at wide margins: it met **95 percent of GPRA performance measures (88 of 93)**; clients rated services at **95 percent on quality, 97 percent on usefulness, and 95 percent on relevance; 94 percent** reported services delivered as agreed; and **91 percent** of project-level outcome measurements met their short-term outcomes. The Center reached 8 to 13 distinct recipient-group types each year against a target of 5. These are the same measures the proposed R3CC will report against (section B.1).

The case comes in three parts: the **framework** PSA uses to build capacity (the four-phase Assess–Plan–Implement–Improve cycle behind the logic model, section B.6); the **documented results** in each of the five States; and the **regional reach and sustainability** that make the work last — all targeting the four capacities the program defines: human, organizational, policy, and resource.

Capacity-Building Framework: How PSA Actually Builds Capacity

PSA builds capacity through a four-phase continuous-improvement cycle — **Assess, Plan, Implement, Improve** — documented in the R4CC Service Design and Delivery Guide and

mapped in the Center’s logic model (section B.6), where the operational detail of each phase is specified. Two commitments cut across all four. First, capacity-building is fundamentally **adult learning**: every phase develops the knowledge and skills of SEA leaders, staff, coaches, and principals, so services are co-designed, problem-driven, and strengths-based (Knowles et al., 2014). Second, **sustainability is designed in** from the start, not bolted on. The cycle rests on a systems view of evidence use — durable change depends less on producing good tools, or even good relationships, than on strengthening the State and local systems through which evidence travels (Best & Holmes, 2010; Boaz & Nutley, 2019) — and it targets the four capacities the program defines: **human, organizational, policy, and resource**. The phase-by-phase protocols, research base, and tiered delivery model appear in full in the Project Design (sections B.1–B.6).

State-level Evidence: Documented Capacity Built, 2019–2024

The State-level evidence below documents capacity-building outcomes already achieved across the Mid-Atlantic. Each example illustrates capacity built across at least one of the four ANI dimensions, demonstrates intensive engagement of the type the FY2026 ANI emphasizes, and shows direct relevance to the Absolute Priority’s focus on math and literacy and students with the greatest need.

Maryland: Leadership pipeline and SEA institutional capacity. From 2019 to 2024, PSA partnered with Maryland districts, statewide associations, and MSDE to strengthen the education leadership pipeline at every level — from teacher leaders and assistant principals through principals and superintendents — while building MSDE’s own institutional capacity to support districts and schools.

PSA partnered with the Public School Superintendents’ Association of Maryland (PSSAM) to launch the Maryland Superintendent Academy and New Superintendent Academy in response

to **superintendent vacancies in more than half of Maryland districts (2022–2024)**. The aspiring-leader Academy ran two cohorts enrolling 36 participants from 75 percent of districts; the new-superintendent series reached 37 percent of districts. As of the latest follow-up, **61.1 percent (22 of 36) of Academy participants had been promoted into senior district leadership**, including superintendencies in higher-poverty rural systems such as Caroline and Garrett. PSA also helped PSSAM produce its **first strategic plan in 74 years**, and member superintendents voted to raise dues to fund staff to execute it — a direct measure of sustained organizational capacity.

In parallel, PSA co-designed the four-level **Next Level Maryland Leadership Academy** with MAESP and MASSP to prepare aspiring assistant principals and principals amid high turnover and Blueprint pressures. Participants moved into target roles at high rates: **51.9 percent of principal-track (28 of 54) and 61.8 percent of assistant-principal-track (34 of 55)** earned promotions — nearly **58 percent** overall, verified through public sources. Several now lead high-need schools where achievement has risen: at Vansville Elementary (Prince George’s), third-grade ELA proficiency rose from 34.7 to 52.4 percent in one year under a Cohort II principal; at Gaithersburg Middle (Title I), seventh-grade ELA climbed from 29.4 (2023) to 39.4 percent (2025). PSA also ran district partnerships in Calvert, Queen Anne’s, and Talbot and a two-year leadership network for the nine-district **Eastern Shore of Maryland Educational Consortium (ESMEC)**, which still runs it today. In Calvert, PSA’s deepest partnership, district MCAP proficiency rose 2022–2025 (mathematics 27.8 to 33.0 percent; ELA 55.9 to 66.2). These are trajectories in PSA’s deepest-partnership districts, not isolated program effects, but they move the Absolute Priority’s own measures in the intended direction.

At the SEA level, PSA built MSDE’s institutional capacity in instruction, accountability, and college-and-career readiness: developing frameworks and rubrics for High-Quality Instructional Materials across ELA, math, science, and social studies; building a scalable monitoring tool and process for CSI schools; standing up a cross-functional school-improvement team to align resources across divisions; and developing a statewide Work-Based Learning Continuum with capacity to conduct CTE gap analyses against workforce needs.

These efforts built human capacity (leader skill and pipeline) and organizational capacity (MSDE’s cross-divisional structures, monitoring processes, and instructional-materials review), designed for sustainability through transfer of delivery capacity to State and local partners.

New Jersey: Cross-agency coordination and the educator pipeline. In New Jersey, the central need PSA addressed was coherence — with 590 districts and 2,500+ schools, consistent practice depends on aligned SEA offices. PSA’s 2019–2024 work with NJDOE built organizational capacity to coordinate across offices and State and local capacity to use Federal funds strategically, address the teacher shortage, and support early learning.

The **Maximizing Federal Funds website**, built by PSA with NJDOE staff across multiple offices, became a widely used resource helping districts deploy ESSER and other Federal funds strategically and sustain practices beyond ESSER — at a point when at least a third of New Jersey students tested below grade level in reading and mathematics. NJDOE data showed the page was **viewed 2,395 times by 1,372 unique users (April 2023–March 2024)**, and NJDOE has described extending it into a “2.0” version reaching beyond Federal funds into statewide budgeting.

PSA facilitated a cross-agency working group spanning **16 NJDOE program offices** to map the comprehensive needs-assessment requirements districts faced, revealing that inconsistent

forms across offices impeded districts' ability to identify needs; the group built a single coordinated CNA tool to reduce local burden and help districts — including those with CSI/TSI schools — target improvement funds. NJDOE credited PSA as “an independent facilitator” whose support “built an environment of collaboration that may not have been possible otherwise.”

PSA also spent three years building NJDOE's analytic capacity to understand the State's teacher-shortage drivers — interviewing superintendents, preparation-program and community-college staff, and high-school staff — and produced a research-based PreK–3 guidebook and family/educator resources disseminated through the State's Center for Early School Success.

NJDOE's 2024 letter described the cumulative effect: “The NJDOE is a stronger agency thanks to the R4CC.” The work built capacity across all four ANI dimensions — most prominently policy (cross-divisional alignment), organizational (the agency's collaborative culture), and human (staff analytic skill) — with attention to supporting the LEAs serving students with the greatest need. That capacity is visible in retained outputs NJDOE still operates: the single coordinated CNA tool that replaced fragmented office-by-office forms, and the NJDOE-owned Maximizing Federal Funds resource.

Pennsylvania: Educator pipeline and statewide school improvement. In Pennsylvania, PSA partnered with the Pennsylvania Department of Education (PDE) and State partners on the educator workforce, school-improvement infrastructure, and statewide frameworks. PSA helped the Philadelphia Regional Institute for STEM Educators (PRISE) build a governance framework, strategic plan, and effectiveness measures to expand the STEM-teacher supply — work reaching **more than 1,200 aspiring and current teachers.**

PSA supported the **Pennsylvania Educator Diversity Consortium (PEDC)** over four years, helping it grow from a PDE-funded initiative into an independent statewide organization — from six university partners to **more than 500 members across 200+ organizations** — and produced three practical toolkits for educator recruitment and retention. PSA built the **Pennsylvania Roadmap for Educational Improvement**, a statewide framework organized around six pillars, and trained **60 school-improvement facilitators serving roughly 700 schools**, building the Communities of Practice and procedures that let PDE sustain the work after the initial training.

This built human capacity (educator and facilitator skills), organizational capacity (PEDC’s evolution into an independent organization and PDE’s school-improvement infrastructure), and policy capacity (the statewide Roadmap) — each designed for sustainability through PDE-owned tools and procedures.

District of Columbia: Graduate Profile, school improvement, and educator pipeline. PSA partnered with the Office of the State Superintendent of Education (OSSE) across graduation requirements, school-improvement infrastructure, special education, justice-involved students, and the educator pipeline. PSA led development of the District’s **first Graduate Profile**, which now anchors the new high-school graduation requirements OSSE is implementing; contributed to the “Accelerate DC” school-improvement report to the DC Council as OSSE planned a new office of school support; and ran a national scan and community listening sessions to ground OSSE’s new role.

Through The Wallace Foundation’s Equity-Centered Pipeline Initiative, PSA partnered with OSSE and DC Public Schools to launch the inaugural Assistant Principal Summit — the first joint SEA–LEA professional learning for DCPS assistant principals — **serving more than 200 assistant principals** responsible for instructional leadership in DC’s highest-need schools.

Delaware: Leadership pipeline and district capacity. In Delaware, PSA worked through the Delaware Department of Education (DDOE) and partner districts on a leadership-pipeline portfolio building both SEA capacity to support district leadership and district capacity directly. PSA supported two DDOE leadership networks, including the Low-Performing Schools Principal Network for the State’s highest-need schools — where **every surveyed principal** reported the coaching helped them build systems supporting improved teaching, and DDOE leaders credited the cascade from supervisors to principals to teachers with reaching instruction — and the Principal Supervisor Network; partnered with the Christina School District on its multi-cohort Leadership Academies; and helped DDOE build its annual employee-evaluation process.

As in Maryland, these programs moved participants into new roles at high rates: **58 percent (7 of 12)** of principals leading the State’s lowest-performing schools and **71 percent (5 of 7)** of their supervisors earned promotions — several into superintendencies — as did **55 percent (23 of 42)** of the Christina Leadership Academy’s first cohort and **37 percent (15 of 41)** of its second.

Those moves reached underserved students directly: of the **50 leaders promoted, 34 moved into school-based roles, 15 now serve in CSI or TSI schools, 12 in high-poverty schools, and 10 in both** — concentrated in Christina, one of the State’s highest-poverty districts. Verified through public sources, these are conservative counts documenting advancement rather than isolating program impact. The work built human capacity (leader skill) and organizational capacity (DDOE’s performance-management infrastructure and district pipeline structures).

Region-wide capacity-building and reach. With SRI International, PSA built and maintained the **R4CC Educator Workforce Resources website**, a curated regional resource on educator recruitment, preparation, and retention still in use across the region. That PSA can build capacity

across State lines is demonstrated, not projected: for five years it served all five SEAs as a single regional Center and sustained a shared regional asset. The proposed R3CC deepens this through standing cross-State networks built around shared priorities — a **Mid-Atlantic Evidence-Based Literacy Network** (science of reading, high-quality materials, coaching, progress monitoring) and a **Mid-Atlantic AI in Education Working Group** developing shared governance frameworks and LEA guidance no single State can build alone — plus a regional resource hub and an annual leaders convening. Its reach extends nationally through the Comprehensive Center Network, feeding proven Mid-Atlantic practice into the National Center while drawing other regions' findings back.

PSA's cumulative regional reach across 2019–2024 — tracked in the R4CC Project Portfolio — comprises **49 distinct State or regional projects** across the five jurisdictions and region-wide, addressing the FY2026 Absolute Priority's areas and reaching students with the greatest need. Each State's results are documented in full in the Track Record attachment.

Sustainability and the durability of capacity built. The defining characteristic of PSA's work is intentional sustainability: each project leaves State or local capacity that endures beyond the Federal partnership. PSSAM now sustains the Maryland Superintendent Academy (with member dues); Pennsylvania's PEDC transitioned from a PDE initiative to an independent statewide organization and PDE sustains the facilitator training; and NJDOE owns the Maximizing Federal Funds website. PSA anchors work in State systems and structures so it endures past Federal funding cycles.

This is the pattern PSA designs for: build State and local capacity in priority areas, then exit leaving actors equipped to sustain the work — documented in the R4CC Project Portfolio, not inferred. Many R4CC products remain in use, several publicly available on State websites:

Maryland’s HQIM framework and Work-Based Learning Continuum, the District’s adopted Graduate Profile, the regional Educator Workforce Resources site, and the PreK–3 guidance PSA developed for NJDOE. This is the model the proposed R3CC will extend over the next five years — accelerating math and literacy, addressing chronic absenteeism, supporting educator pipelines, and helping each SEA deploy historic new State investments for students with the greatest need.

Forward capacity targets, 2026–2031. The record above grounds a specific forward commitment. In each jurisdiction, the proposed R3CC will extend work already under way toward a defined, durable result — capacity the State will own after the partnership ends — through the annual, State-approved service plans PSA develops via needs-sensing, organized across intensive, targeted, and universal tiers. The highest-leverage commitments:

Delaware. Build DDOE capacity to scale the Teacher Residency Program and Next Ed Workforce model and strengthen SEA-level literacy (science of reading, high-quality materials, coaching), while extending leadership-pipeline cohorts and an elementary chronic-absenteeism cohort — concentrated in the high-poverty urban districts holding most of Delaware’s CSI schools. *What endures:* DDOE- and district-owned residency-scaling, leadership grow-your-own, literacy-coaching, and absenteeism tools.

District of Columbia. Build OSSE’s capacity to complete the graduation-requirements arc, embed the Graduate Profile across divisions, and operationalize de-siloed strategic-plan implementation integrating strategic-funding, AI, and data initiatives — so the new graduation requirements serve students the current ones underserve, including students with disabilities and those on CTE pathways. *What endures:* OSSE-owned graduate-profile integration, cross-agency routines, and LEA-facing AI guidance.

Maryland. Build MSDE’s capacity to operationalize Blueprint implementation — the educator career ladder, collaborative-time measurement, and the Accountability and Implementation Board-to-MSDE handoffs — and to measure HQIM implementation, while sustaining the leadership academies with PSSAM, MAESP, and MASSP so Blueprint investments reach concentration-of-poverty schools. *What endures:* MSDE-owned Blueprint, HQIM-measurement, and CSI-monitoring capacity, and association-run academies.

New Jersey. Build NJDOE’s capacity to align funding to State priorities (including a refreshed Maximizing Federal Funds resource beyond Federal funds) and to use its own data through role-based tools and governance, while accelerating literacy and mathematics through district cohorts and strengthening the educator pipeline and high-impact tutoring — delivered through the State’s 21 county offices and prioritizing the highest-need districts. *What endures:* NJDOE- and county-owned funding-alignment framework, data-governance tools, refreshed resource, and coordinated needs-assessment tool.

Pennsylvania. Build PDE capacity to implement a statewide bell-to-bell cell-phone standard and make strengthened-adequacy investments count in high-need, rural, and high-poverty districts, while accelerating math and literacy through district cohorts and sustaining the school-improvement facilitator Communities of Practice serving ~700 schools — delivered through the Commonwealth’s 29 intermediate units. *What endures:* PDE- and IU-owned cell-phone-standard tools, a sustained facilitator network, and structured-literacy coaching resources.

The likelihood that the project will build local, State, and regional capacity for underserved populations is therefore not merely a forward claim. It is grounded in the record of capacity already built across the five Mid-Atlantic jurisdictions over 2019–2024 and in the continuous-

improvement framework that produced those outcomes — which the proposed R3CC will refine and apply across 2026–2031.

Project Design (b)(1) Goals, Objectives & Outcomes

(b)(1) Goals, Objectives, and Measurable Outcomes

The Center’s work is organized around four goals, each tied to the FY2026 Absolute Priority’s emphasis on math and literacy and on intensive, client-driven technical assistance for students with the greatest need. Each goal carries measurable objectives and time-based outcomes that are ambitious yet achievable within the 60-month period, maps to the four ANI capacity dimensions (human, organizational, policy, resource), and traces to the logic model in section B.6. Outcomes are stated at three horizons per the ANI’s definitions: short-term (one year), medium-term (two to three years), and long-term (four or more years).

Two features make these goals measurable rather than aspirational. First, each objective names the group for whom change is expected and states the change at an assessable level, consistent with the Center’s outcome-writing discipline. Second, progress is tracked through the performance-management system in section B.2, reporting on the four Program Performance Measures. Targets are set at two levels: the four Program Performance Measures carry fixed numeric targets the Department approved and the Center met or exceeded every year of its 2019–2024 operation — a defensible floor with a five-year record of being beaten; and each engagement’s project-level outcome threshold is calibrated with the client in the Annual Service Plan, because services are client-driven and baselines differ across the five States. The Center-level targets, and the prior-cycle results that ground them, are:

Client satisfaction — quality, usefulness, and relevance (Measure 1). At least 85% of key clients report satisfaction with the quality, usefulness, and relevance of services. (R4CC met this target every year of 2019–2024; five-year results were 95–97%.)

Range of recipients reached (Measure 2). Services and products reach at least six recipient-group types each year. (R4CC served 8–13 recipient-group types each year.)

Services implemented as intended (Measure 3). At least 80% of planned milestones and outputs are completed, and at least 80% of key clients report that services were implemented as agreed. (R4CC met this target every year; five-year delivered-as-agreed was 94%.)

Recipient outcomes met (Measure 4). At least 75% of projects meet the short-term outcomes set in their Annual Service Plans, with at least 80% of clients reporting gains in knowledge and understanding and at least 60% reporting application or improvement, across the human, organizational, policy, and resource dimensions. (R4CC met every project-outcome target each year; 91% of project-level outcome measurements over five years showed outcomes met.)

Every one of these targets is measured by an instrument already embedded in the continuous-improvement system described in section B.2, so each is trackable exactly as stated. Consistent with the Center’s record, exceeding a target is reported as a strength rather than treated as a reason to reset the bar to a level the Center might miss. Within each goal, the project-specific outcome threshold is then calibrated with the client in the Annual Service Plan, honestly reflecting differing State starting points.

Goal and measurable objective	Short-term outcome (1 yr)	Medium-term (2–3 yr)	Long-term (4+ yr)
Goal 1. Accelerate math and literacy achievement (human;	SEA and educator knowledge and	Evidence-based math and literacy	Sustained gains in math and literacy

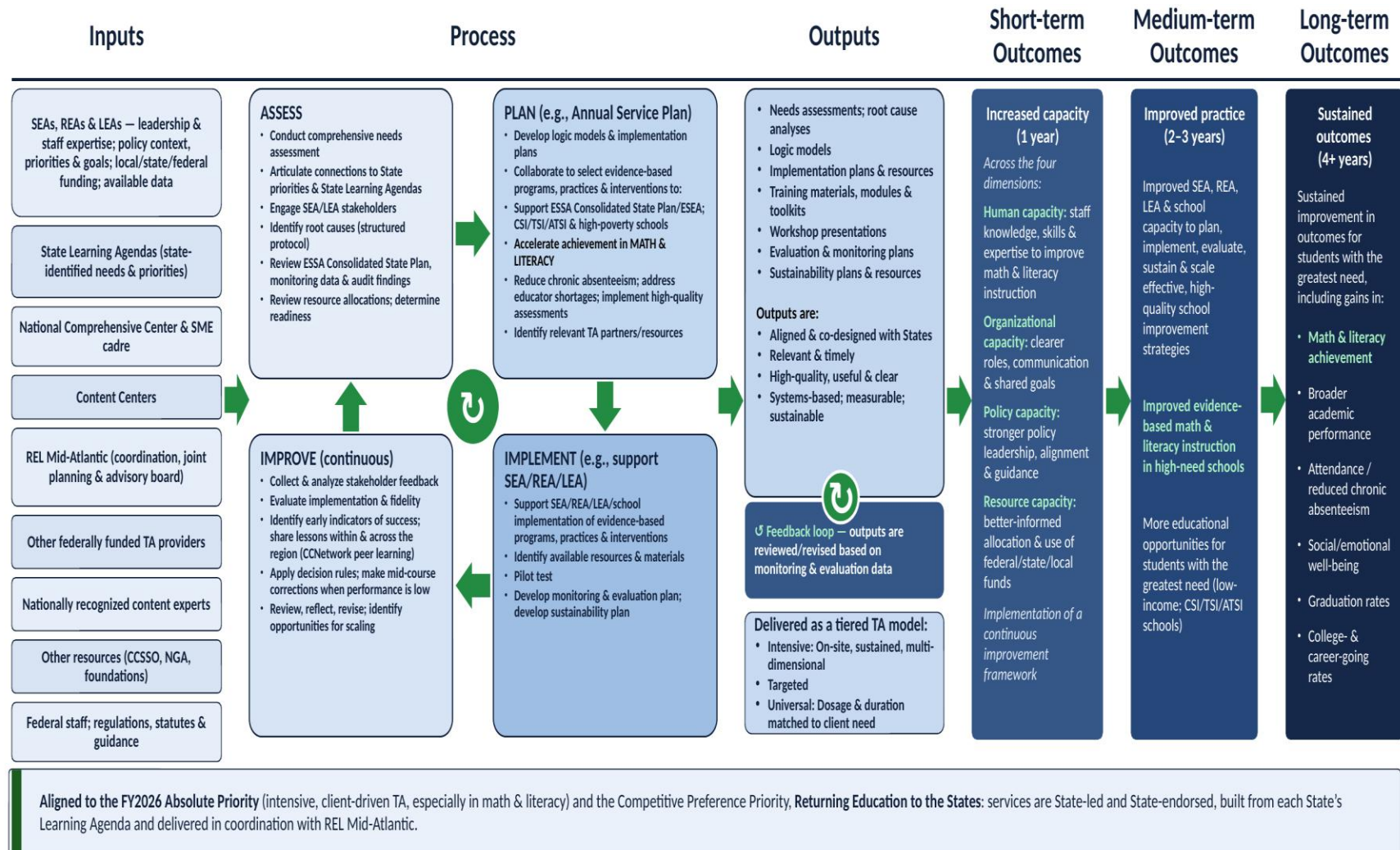
Goal and measurable objective	Short-term outcome (1 yr)	Medium-term (2–3 yr)	Long-term (4+ yr)
policy). Engaged SEAs, LEAs, and schools select, implement, and sustain evidence-based math and literacy programs — including structured/science-of-reading approaches and high-quality instructional materials — in schools serving students with the greatest need.	skills to improve math and literacy instruction increase; materials and coaching systems selected and in use.	instruction improved in high-need schools across the region.	achievement for students with the greatest need.
Goal 2. Strengthen the educator and leadership pipeline (human; organizational). Engaged SEAs and LEAs strengthen educator and leadership pipelines — recruitment, preparation, development, and retention — with attention to shortage areas and high-need schools.	SEA/LEA capacity to design and run pipeline and leadership-development structures increases; tools and cohorts in use.	Improved leadership and instructional-staffing practice in high-need districts and schools.	Sustained improvement in educator supply, retention, and leadership stability serving students with the greatest need.
Goal 3. Build SEA organizational and policy capacity to lead improvement (organizational; policy). Engaged SEAs build the cross-divisional structures, routines, and policy alignment needed to plan, implement, evaluate, sustain, and scale improvement, including for CSI/TSI/ATSI schools under ESEA 1111(d).	Clearer roles, communication, shared goals, and policy alignment within engaged SEAs; continuous-improvement routines adopted.	Improved SEA/REA/LEA capacity to plan, implement, evaluate, sustain, and scale high-quality improvement strategies.	Sustained State capacity to lead self-directed improvement for students with the greatest need beyond the Federal partnership.
Goal 4. Improve resource capacity and evidence use (resource; policy). Engaged SEAs and LEAs use data and evidence to allocate and align Federal, State, and local resources — and to deploy historic new State investments — toward the highest-need students and schools.	Better-informed allocation and use of funds in engaged agencies; data-use routines strengthened.	Improved alignment of resources and evidence to high-need schools and State reform investments.	Sustained, evidence-informed resource decisions benefiting students with the greatest need.

Every objective is tracked through the continuous-improvement instruments in section B.2 and the four Program Performance Measures, against the Center-level targets above, with each project's specific outcome threshold calibrated with the client in the Annual Service Plan.

All four goals are achievable within the 60-month period because the Center builds on established relationships and a proven operating model, extending prior work rather than starting new.

The Center's work is governed by the logic model in Exhibit 1, which makes explicit how inputs relate to outcomes — the standard the FY2026 criteria call for — tracing the causal chain from inputs through process and outputs to short-, medium-, and long-term outcomes.

Exhibit 1. Logic Model for the Region 3 (Mid-Atlantic) Comprehensive Center.



The model's inputs (State Learning Agendas and Federal, expert, and partner resources), its four iterative processes (Assess, Plan, Implement, Improve), its outputs (co-designed, evidence-based supports delivered at the right tier), and its three-horizon outcomes are specified in sections B.2 and B.3. The chain runs from State-identified needs through the assess–plan–implement–improve cycle to supports that first build the four capacities (human, organizational, policy, resource), then change SEA/LEA/school practice, and ultimately sustain better outcomes for students with the greatest need — each link a claim the Center tests through the B.2 continuous-improvement system.

(b)(2) Data Use for Continuous Improvement

The proposed Center treats performance management and evaluation as a single **continuous-improvement loop**, not a reporting obligation bolted onto delivery. Quantitative and qualitative data — with meaningful input from clients, partners, and community members — are collected on a defined cadence, reviewed in structured reflection with the Center’s evaluator, and converted into specific service adjustments, with pre-specified rules for when a project is off track. This is the operational answer to the FY2026 criterion on using data to inform continuous improvement. The loop’s evaluation function is led by the Center’s evaluator, **Derek Riley**, who carried this role across 2019–2024 and by design remains independent of service delivery — he gathers data and prompts teams to reflect rather than delivering services, which is what makes the performance data credible enough to drive decisions. The capacity-building partners, **SRI** and **NORC**, are by contrast integrated directly into State delivery teams. This section describes the loop in four parts: the data that feeds it, the instruments and cadence that move it, the decision rule that closes it, and the reporting it serves.

The loop operates at every tier — universal, targeted, intensive — and is grounded, like the delivery model, in continuous-improvement and implementation-science research (Bryk et al., 2015): disciplined inquiry, evidence use, short-cycle testing, and attention to whether a change reaches practice. Each project carries a logic model, co-developed by project and evaluation staff, that makes the causal chain explicit and gives the loop a standard against which to judge progress. Those outcomes trace upstream to each State’s Learning Agenda (or Strategic Plan), so the loop measures progress against State-defined priorities, not goals of the Center’s own choosing.

The Data that Feeds the Loop

The Center collects both quantitative and qualitative data, deliberately paired so that each compensates for the other's blind spots — numbers establish reach and rate, narrative explains why. Across projects, the Center draws on:

- **Quantitative data:** participant counts and reach by client type and tier (from participant logs); milestone and output completion and on-time rates; service-quality, relevance, and usefulness ratings from client and recipient surveys; and project-specific outcome measures tied to each logic model, reported by capacity dimension (human, organizational, policy, resource).
- **Qualitative data:** client and recipient interviews; observations of service delivery; review of project artifacts and deliverables; open-ended survey responses; and field feedback gathered during delivery. Qualitative evidence is what surfaces the implementer's perspective — the early signal that a service is or is not landing as intended.
- **Meaningful community-member and partner input:** structured input from the people closest to the work — SEA program staff, district and school leaders, educators, and, where relevant to a project's outcomes, families and community members — gathered through the needs-sensing protocol, project working sessions, and the joint REL–Center advisory board. This input is treated as data: it is documented, reviewed in the continuous-improvement cycle, and used to adjust services so they reflect recipient needs and remain relevant and useful.

Throughout, data collection and review weight the students and communities the statute prioritizes — students from low-income families and students in CSI/TSI/ATSI schools under

ESEA section 1111(d) — so that the loop concentrates the Center’s attention where improvement matters most.

The Instruments and Cadence that Move the Loop

The loop runs on four standing instruments at three nested cadences — monthly, quarterly, and twice-yearly. Stating the cadence concretely is deliberate: in 2024, reviewers faulted a vague “at opportune times” description and a reliance on twice-yearly data they judged too infrequent. The structure below answers that directly — the twice-yearly Center-level review is the top synthesis layer, sitting on top of monthly and quarterly loops that catch issues far sooner. Exhibit 2 summarizes the instruments; the narrative that follows specifies how each drives improvement.

Exhibit 2. The continuous-improvement loop runs at three nested cadences.

Instrument	Cadence	What it captures
Monthly Report	Monthly (due the 15th)	Each project team’s structured reflection on what did and did not work the prior month, and what it implies for the work ahead.
Participant Log	Monthly (due the 15th)	Reach and range of service by project and client type — who is being served, how, and how often.
Continuous Improvement Report + CI Meeting	Quarterly (before each QPR and the annual ASP)	Outcomes progress and measurement notes; reflection on challenges, lessons, and possible changes in strategy; milestone status; emerging State needs; staffing and resources.
Center-level evaluation debriefing + after-action reviews	Twice yearly (debriefs); AARs at major-project close	Cross-project synthesis: patterns across projects and States, Center-level performance against the program measures, and lessons that should become standard practice.

Monthly: Early Detection. Every project files a *Monthly Report* and an updated *Participant Log* by the 15th of the following month. The *Monthly Report* is not a status update; it is a structured

reflection on what worked, what did not, and what that implies for the month ahead, giving the Center director a current read on all projects and the earliest opportunity to intervene. The Participant Log keeps reach data current, so under-service to a client or tier is visible within weeks.

Quarterly: the reflection-to-action step. Each quarter — before each Quarterly Progress Report and before the annual service-plan submission — every project completes a Continuous Improvement Report and a guided meeting with the evaluator and, where useful, the Center director. This is where data becomes decision: the review covers outcome progress by dimension, whether each outcome remains appropriate and on track, challenges and possible strategy changes, milestone status, emerging State needs, and staffing. The meeting finalizes the report, may revise goals and outcomes, and aligns the logic model, milestones, and work. Because it runs every quarter and feeds the next Annual Service Plan, adjustments happen while the project is still in motion; the first report follows a project’s first full quarter, so new projects enter the loop quickly.

When a project is off track: the decision rule. The cycle carries **pre-specified decision rules** for when data signal a project is off track. In each quarterly review, the team and evaluator test each project against three thresholds: **milestone schedule** (any deliverable more than 30 days late); **outcome trajectory** (any measure not trending to target by year-end — e.g., milestone/output completion below Measure 3’s 80% or short-term outcomes off the path to Measure 4’s 75%); and **reach** (recipient counts below planned). Crossing any threshold triggers a defined response on a fixed clock: within two weeks, (1) a root-cause check using the needs-sensing method to locate the gap (design, dosage, readiness, staffing, or context); (2) a documented adjustment — to service, intensity, timeline, staffing, or the outcome — recorded in

the CI Report and next ASP; and (3) where resources or staffing are implicated, escalation to the Center director, who owns reassignment and reallocation across projects. The correction is re-checked at the next monthly report; an indicator not back on trajectory within one quarter is elevated to Center-level review.

This is also where the performance-management system — the assignment and supervision of staff, the management of client relationships, and the allocation of resources — connects to the data. Each project has an assigned, accountable staff lead; the Center director reviews project performance through the monthly and quarterly instruments; and resourcing decisions follow from that review rather than from fixed assumptions set at proposal time.

Twice-yearly: Center-level Synthesis and Learning Transfer

Twice a year, Center leadership and the Center’s evaluator conduct a Center-level evaluation debriefing that looks across projects and States — examining patterns, Center-wide performance against the program measures, and lessons that should become standard practice. This is the synthesis layer, not the early-warning layer: the monthly and quarterly cycles catch project-level issues; the twice-yearly review is where the Center learns from itself.

Major projects also close with an **after-action review (AAR)** — a structured retrospective the Center used throughout 2019–2024 that changes subsequent practice, not a postmortem filed away. The AAR of the Calvert County leadership-pipeline project, for example, led the team to **broaden participant selection** for the next cohort and to **build mid-year benchmark data collection** into the following year’s plan after it identified a progress-monitoring gap. The same review reshaped **Center-wide practice**: its lessons became standard operating procedures — co-developing a project logic model with explicit capacity-building outcomes for every engagement, and a communications practice for sharing impact stories. The Calvert review thus shows the

loop operating at two levels: correcting one project's next cycle and improving how every project is designed.

Client Satisfaction and Detection of Changes in State Context

Two further signals are built into the loop periodically. First, the Center assesses **client satisfaction** — quality, usefulness, and relevance — through client and recipient surveys and lead-client feedback in service planning and the joint advisory board; a decline triggers the same review-and-adjust mechanism. Second, the loop is designed to catch **changes in State context** — a new Chief, a legislative shift, a budget change, a new initiative — that change what a project should do. Continuous needs sensing (monthly policy scans, standing project-team review, and the mid-year check-in with the Chief) feeds the same cycle, so a material change prompts a timely revisit of the service plan rather than a year-end discovery. This responsiveness is itself a lesson from prior work: in the Calvert engagement, a mid-project superintendent transition was surfaced and managed without derailing the project.

Reporting and the Four Program Performance Measures

The loop produces the data ED requires for the four Program Performance Measures and aligns with Quarterly, Annual Progress, and Annual Evaluation Reports at project and Center levels, using common measures across projects so project data aggregate cleanly. These activities are distinct from and run alongside the independent national evaluation of the Comprehensive Centers Program conducted by NCEE under ETAA section 204, in which the Center will participate fully, providing the information NCEE requests. The two are complementary — the Center's loop improves its work in real time; the NCEE evaluation assesses the program nationally.

These measures carry the Center-level targets set in B.1, grounded in the 2019–2024 record and Department-approved: at least **85% of key clients satisfied** with quality, usefulness, and relevance (Measure 1); at least **six recipient-group types** reached (Measure 2); at least **80% of milestones and outputs completed** and 80% of clients reporting services implemented as agreed (Measure 3); and at least **75% of project short-term outcomes met**, with at least 80% of clients reporting knowledge gains and 60% reporting application or improvement across the four dimensions (Measure 4). These are the targets the “trending toward target” decision rule is assessed against; project-specific thresholds are calibrated with each client in the Annual Service Plan.

Why These Methods Yield Reliable, Valid, Meaningful Data

The methods are likely to yield reliable, valid, and meaningful data for three reasons. They are **mixed by design** — pairing quantitative reach and outcome measures with qualitative interviews, observation, and artifact review, so findings triangulate. They are **standardized and aligned** — common measures across projects, aligned with the cross-Center evaluation community, on fixed templates and cadence, supporting clean aggregation from project to Center level. And they are **tied to logic models** — every outcome measured was identified in advance by a co-developed logic model, so the data answer questions that matter to the theory of action. Outcome statements follow the Center’s outcome-writing discipline, which makes them verifiable.

The capacity to collect and report these data is demonstrated, not asserted. The evaluator, **Derek Riley**, led the R4CC evaluation across 2019–2024 and was a core member of the Department’s cross-Center Evaluation Workgroup (2020–2023), helping develop the Network-wide capacity-building and implementation measures used for GPRA reporting. He produced Quarterly,

Annual Progress, and Annual Evaluation Reports for the region every year — a sustained record of valid reporting on exactly this program’s measures — supported by a mid-level evaluation staff member. His independence from delivery is itself a data-quality safeguard: those delivering services are not those grading them. **SRI** and **NORC** strengthen the data by helping teams build sound, low-burden instruments into delivery.

Taken together — mixed quantitative and qualitative data plus partner and community input; four standing instruments at monthly, quarterly, and twice-yearly cadences; pre-specified decision rules with a clear escalation path; and an evaluation function with a demonstrated reporting record — the Center’s plans use data, of both kinds and from the right people, to drive continuous improvement in the project’s operation, not merely document performance.

(b)(3) Quality, Intensity, and Duration of Technical Assistance [APP REQ 4, 8]

The R3CC delivers technical assistance of sufficient **quality, intensity, and duration** to change practice because it works through a **disciplined, documented service model** refined over five years as the Mid-Atlantic Comprehensive Center (Region 4, 2019–2024, redesignated Region 3). **Quality** comes from a single continuous-improvement method — four iterative processes with named protocols, artifacts, and controls — applied to every engagement. **Intensity** comes from a tiered delivery design that matches dosage and contact to the depth of the client’s need. **Duration** comes from multi-year engagement arcs built around a planned transfer of capacity to State and local partners. This section specifies each feature operationally, then details the Center’s approach to intensive services.

Throughout, the work prioritizes the students the statute names: under ETAA section 203(e), the Center prioritizes schools and LEAs serving high percentages or numbers of students from low-income families — including in rural and urban areas and those receiving Title I assistance —

and schools implementing comprehensive, targeted, or additional targeted support and improvement.

Quality: A Capacity-Building Method Applied to Every Engagement.

The quality of the Center’s technical assistance rests on a **method**, not on staff reputation alone. Every engagement, at every tier, moves through the same four-process continuous-improvement framework documented in the R4CC Service Design and Delivery Guide and depicted in the logic model (Exhibit 1): **Needs Sensing (Assess)**, **Service Planning (Plan)**, **Service and Support Delivery (Implement)**, and **Continuous Improvement and Evaluation (Improve)** — each with defined protocols, work products, and quality controls, iterating across the life of every project. This specificity is deliberate. In 2024, reviewers found the Center’s root-cause analysis, stakeholder engagement, and performance management asserted but not specified — “the process to be used is not detailed.” The descriptions below specify each process so a reviewer can see how a high-leverage problem becomes a co-designed plan, then delivered service, then measured improvement.

***Assess—Needs Sensing.** The Center identifies needs, uncovers their root causes, and converts them into an actionable capacity-building plan through a research-informed five-step needs-sensing protocol applied with every client (Exhibit 3), grounded in implementation science, continuous-improvement, and adult-learning research.*

Exhibit 3. The Center’s research-informed five-step needs-sensing protocol

	Step	What the Center does	Output
1	Define the scope	Clarify the problem under review and the decision the findings will inform; set the timeline; determine which SEA offices, LEAs, educators, families, and partners to	A needs-sensing purpose statement, decision question, timeline, and

	Step	What the Center does	Output
		engage; and set the criteria for judging a need high-priority.	stakeholder engagement plan.
2	Assemble the needs-sensing team	Form a team able to interpret data, validate findings, and support action planning — SEA leaders, program and data staff, regional partners, and LEA, educator, family, and community representatives — with clear roles, cadence, and an approval process.	A participant list with roles and responsibilities and a meeting schedule with milestones and deliverables.
3	Collect and review data	Gather and review quantitative data (outcomes, graduation, assessment, attendance, discipline, educator attrition/vacancies, implementation), qualitative data (climate surveys, focus groups, interviews, monitoring reports), and system plans (strategic, ESSA, grant, improvement); identify evidence gaps and collect more input as needed.	An initial data scan summarizing trends, gaps, affected groups, and follow-up questions.
4	Conduct root-cause analysis	Facilitate a structured 5 Whys protocol with the team: develop a clear problem statement, ask “why” iteratively to move past symptoms, identify contributing factors across policy, practice, people, data, funding, and leadership, distinguish symptoms from root causes, and confirm which causes the SEA can influence through technical assistance.	A root-cause map identifying primary causes, contributing factors, supporting evidence, and where technical assistance can help.
5	Prioritize needs and develop the TA action plan	Prioritize needs against defined criteria — readiness, urgency, evidence, greatest-need students and communities, feasibility, impact, alignment, and sustainability; assign each to universal, targeted, or intensive support; build an action plan with steps, timelines, success measures, funding, and owners; validate it with SEA leaders; and set feedback loops to monitor and adjust.	A prioritized needs list and technical assistance action plan that informs the annual capacity-building service plan.

Two features answer the 2024 finding directly. **Step 4 specifies the root-cause method** — a facilitated 5 Whys analysis distinguishing symptoms from root causes and confirming which causes the SEA can influence — so the strategy targets the driver, not the symptom. **Step 5 routes each prioritized need to a tier** and produces the action plan that becomes the Annual Service Plan, making tier assignment an explicit, criteria-based output. Throughout, the protocol weights students with the greatest need, including those in CSI/TSI/ATSI schools under ESEA

section 1111(d). Needs sensing is both formal and continuous. The five-step protocol anchors the annual cycle with the State Chief or designee and key SEA staff, supported by REL Mid-Atlantic where the work is shared. Between cycles, monthly State policy scans, standing project-team review of emerging needs, and a mid-year check-in with the Chief keep new or shifting priorities folded into the plan.

Plan — Capacity-Building Service Planning. *Each high-leverage problem becomes a project within an Annual Service Plan (ASP) co-developed with the SEA and approved by the Chief or designee before work begins — the mechanism that keeps services client-driven and State-endorsed. Each project specifies the problem; the evidence-based programs and interventions selected; time-based short-, mid-, and long-term outcomes; responsible personnel and TA partners; and milestones, outputs, dissemination plans, and fidelity measures where appropriate. Every project carries a logic model co-developed with the SEA and Center evaluators, so the causal chain from service to outcome is explicit, and names which of the four capacity dimensions it primarily builds.*

Outcomes are written to be measurable and verifiable: each project names the group for whom change is expected, states the outcome at a measurable level, and aligns its language to how it will actually be assessed — built to be evaluated, not merely described. The ASP's required elements are detailed in the management plan (section C.1), satisfying Program Requirement 1.

Implement — Service and Support Delivery through a Tiered Model. *Delivery is governed by five operating disciplines applied on every project: a shared understanding of the work inside the Center and with the partner; adherence to the agreed plan, with formal change control when scope shifts; documented meeting summaries spotlighting next steps and owners;*

agendas circulated in advance on an agreed cadence; and continuous solicitation of partner feedback on progress and management, the difference between intensity felt as reliable partnership and contact that is merely frequent. The depth and frequency of delivery are set by a three-tier model, intensive, targeted, and universal, matching dosage and duration to the client's need and the difficulty of the change. The tiers reinforce one another: intensive engagements generate tools that become targeted cohort curricula, which yield resources that move into the universal tier for region-wide reach. Implement and Improve operate within every tier.

Improve — Continuous Improvement and Evaluation. *Every engagement runs inside a continuous-improvement loop with defined instruments and cadence. Teams file a Monthly Report on what did and did not work and a Participant Log capturing reach; each quarter they complete a Continuous Improvement Report and a guided reflection with evaluators covering outcome progress, challenges, milestone status, and emerging State needs, with Center-level debriefings at least twice yearly. In direct response to the 2024 finding that data was described but not the improvement process, performance data feeds pre-specified decision rules that govern mid-course corrections when a project is off track; the full mechanism — what happens when performance is low and who owns each step — is specified in section B.2.*

Intensity and Duration: A Tiered Delivery Model with Explicit Dosage

The Center delivers at three intensities, each with a distinct profile of quality, intensity, and duration — the operational answer to the FY2026 sub-factor: dosage and duration stated explicitly rather than left to inference. Exhibit 4 summarizes the tiers; the narrative below specifies each.

Exhibit 4. The R3CC tiered service-delivery model.

Tier	Quality (who delivers, how)	Intensity (cadence & contact)	Duration (arc & hand-off)
Intensive	Senior Center staff embedded with SEA leadership and, where relevant, high-need districts; deliverables co-designed and SEA-approved; multi-dimensional (builds two or more capacity dimensions at once).	High-touch. Weekly-to-biweekly sessions during peak phases; continuous availability between sessions; embedded in the SEA's own working structures.	Multi-year. 18–24-month arc, phased ramp-up in months 1–6, with a planned gradual release of responsibility so the SEA owns the work before the arc ends.
Targeted	Cohort-based programming and networks of practice led by consistent facilitators; a clear competency framework; applied practice between sessions; participants selected with the SEA.	Medium-touch. Monthly cohort sessions with structured between-session work and, where designed, embedded coaching.	9–18 months per cohort, with successive cohorts over the Center's term; tools refined in each cohort scale to later cohorts and into the universal tier.
Universal	Tools, resources, and convenings peer-reviewed within the Center and field-tested in regional contexts; convenings co-led by content experts and SEA staff; 508-compliant and branded.	Low-touch, continuously available, with periodic content refresh; designed for broad reach across all five jurisdictions and for peer learning across State lines.	Ongoing across the full five-year term; resources are maintained and revised based on monitoring and evaluation data and on uptake.

Intensive Support is multi-year, high-touch, embedded assistance on an SEA's highest-leverage priorities, built as an 18–24-month arc with a deliberate ramp-up and a **gradual release of responsibility** that transfers facilitation, tools, and ownership to State and local staff before it ends. PSA used this model in Delaware, co-delivering a Principal Supervisor Leadership Program with DDOE (2021–2023) and progressively releasing facilitation so the State now sustains the work itself. Intensive support is **multi-dimensional** by design: a single engagement typically builds more than one capacity dimension at once — SEA staff knowledge and skills (human capacity) and the cross-divisional structures that let the agency act coherently

(organizational capacity). The Center’s NJDOE work shows the pattern: facilitating a working group across **16 NJDOE program offices** built both staff analytic skill and the machinery to align them.

Targeted Support. *This is mid-touch, cohort-based work with staff or leaders sharing a specific challenge, through structured cycles of professional learning and applied practice — monthly convenings over 9–18 months, with between-session work and embedded coaching where designed. The Center’s Maryland work shows concrete dosage: the Maryland Superintendent Academy ran as seven 1.5-day sessions, while urgent support to newly placed superintendents ran as three full-day sessions, dosages matched to distinct needs. In addition, tools refined in one cohort become the next cohort’s curriculum and ultimately move into the universal tier, so a small-group investment becomes a regional asset, the logic behind the four-level Next Level Maryland Leadership Academy.*

Universal Support. *This offers broad-reach, lower-touch resources, tools, and convenings available region-wide across the full term — the cost-effectiveness the Absolute Priority requires, extending intensive and targeted work to SEAs, REAs, LEAs, and schools. Resources are peer-reviewed, field-tested, co-branded with SEA staff, and 508-compliant. The NJDOE Maximizing Federal Funds website is the model: a jointly built, NJDOE-owned resource that drew 2,395 page views from 1,372 unique users (April 2023–March 2024) — universal reach generated from intensive cross-office work.*

Two universal offerings are designed as **regional anchors** for needs every Mid-Atlantic jurisdiction shares and that benefit from cross-State peer learning: a **Mid-Atlantic literacy network** (science of reading, high-quality instructional materials, coaching, progress

monitoring), drawing on the Center’s literacy specialists; and a **Mid-Atlantic mathematics network** (high-quality math materials through curriculum-based professional learning, coaching, progress monitoring), drawing on its mathematics specialists. Both are low-touch, co-designed with each State’s leads, and anchored in the Absolute Priority’s emphasis on math, literacy, and students with the greatest need.

The Evidence Base: Why this Design Changes Practice

Our confidence that Center services can change practice rests on the same research base that grounds our needs-sensing protocol, now applied to delivery. That is, four strands, including **adult-learning principles, coaching, implementation science, and continuous improvement** each shape a specific design choice. The ANI names the first three; continuous improvement is what keeps these strands effective over a multi-year engagement.

Adult learning and coaching. The targeted and intensive tiers are built around how experienced professionals learn: relevant, problem-centered work anchored in their own experience, with sustained opportunity to apply and adapt rather than one-time exposure — professional learning that is sustained, job-embedded, content-focused, and collaborative (Knowles et al., 2014). That is why the model favors cohorts meeting over months with structured between-session work and coaching that follows training into the job, not stand-alone workshops. **Coaching** is the mechanism that converts knowledge into changed practice, because training alone rarely transfers while training paired with job-embedded coaching does (Kraft, Blazar, & Hogan, 2018). The Center’s Delaware work made the chain explicit — coaching principal supervisors who coached principals who coached teachers: **all 25 Christina School District principals** agreed the coaching helped them build the systems that support better teaching, and DDOE has since **scaled the model statewide through its DTGSS rollout**.

Implementation Science and Continuous Improvement. The Center installs, practices, and sustains evidence-based programs with fidelity by attending to the drivers that determine whether a change holds, including staff competency, organizational conditions, leadership, and data systems (Fixsen et al., 2015), so every project carries a logic model, an implementation plan, and fidelity measures where appropriate. Fidelity is not rigidity: where a practice is poorly matched to local conditions, the Center supports principled adaptations tested against emerging data across sites, the adaptive-integration approach behind the **Carnegie Math Pathways** results. Every engagement runs as a disciplined, iterative inquiry, defining the problem, testing whether changes work, and adjusting in short cycles (Bryk et al., 2015), while connecting the needs-sensing protocol to delivery and back: the Step 5 action plan is treated as testable changes, monitored through the continuous-improvement instruments in section B.2 and revised when the evidence says to. Intensity and duration are calibrated, not arbitrary, with enough cycles to take hold, enough feedback to correct course.

Matching Tier and Dosage to Client Need

The Center does not apply a fixed dosage. Tier and intensity are selected during Assess and Plan against explicit criteria, so Federal capacity-building resources concentrate where the need is deepest and the change is hardest. The decision turns on four considerations:

- **Depth and complexity of the change.** Systemic, multi-divisional, or multi-year changes call for the intensive tier; discrete, well-bounded skill-building calls for targeted cohorts; broadly applicable tools belong in the universal tier.
- **Priority and statutory need.** Problems whose solution would most improve outcomes for students with the greatest need — in high-poverty, Title I, and CSI/TSI/ATSI schools under

ESEA 1111(d) — weight toward the more intensive tiers, consistent with ETAA section 203(e).

- **SEA readiness and ownership.** Assess gauges whether the agency has the leadership, staffing, and structures to carry the work; intensive support is reserved for problems the SEA is ready to own and sustain, so the investment is not stranded.
- **Reach and cost-effectiveness.** Where a need is shared across jurisdictions, the Center routes it to the universal tier or a regional anchor to maximize reach per dollar — the cost-effectiveness the Absolute Priority requires.

Because the tiers connect, a single high-leverage problem is often addressed across all three at once — an intensive SEA engagement, a targeted district cohort, and universal tools carrying the practice region-wide. The Center’s prior work shows the layering: intensive NJDOE facilitation producing a State-owned universal resource; an intensive Maryland leadership engagement producing targeted academies and durable, association-owned tools.

Approach to Intensive Capacity-building Services

Intensive services are the core of the proposed Center’s work and the heart of the FY2026 Absolute Priority. The Center’s approach has three defining commitments.

Beneficiaries Identified from Data. *Intended beneficiaries are identified from regional data, not assumptions. During the Assess phase, the Center analyzes each State’s assessment and accountability data and the counts of schools identified under ESEA 1111(d) to locate where outcomes for students with the greatest need are weakest. The data consistently point to the same population: students in high-poverty, Title I, and CSI/TSI/ATSI schools, and students in both urban systems and small rural districts. In Delaware, third-grade English language arts*

proficiency on the Smarter Balanced assessment fell from 52 percent in 2019 to 38 percent in 2025, a 14-point decline the State named a literacy priority and answered with its 2025–2028 Delaware Early Literacy Plan, requiring Science of Reading training and high-quality instructional materials for all K–3 educators. The state’s K–3 educators and highest-need schools are thus the intended beneficiaries of intensive literacy support. In Maryland, superintendent vacancies in more than half of the State’s 24 districts (2022–2024) identified new and aspiring district leaders as the beneficiaries of an intensive leadership-pipeline engagement.

Driven by Client Needs. Intensive services are **driven by client-identified need** through Needs Sensing and the State Learning Agenda. The Center arrives with no fixed program; the SEA names the high-leverage problems and the Center builds the engagement around them, drawing on the State’s Learning Agenda and data. With REL Mid-Atlantic, the Center helps each State refine a multi-year Learning Agenda and builds the Annual Service Plan from its priorities. The model is the same in every jurisdiction whether four or five States endorse.

Co-Developed with Client Input. Intensive services are **co-developed at every stage**: deliverables are co-designed with SEA leadership and approved before and throughout delivery; logic models are built jointly with State teams; and gradual release makes State and local staff co-producers from the start, not recipients at the end. The Center’s standing as a trusted, neutral partner — described by NJDOE as a thought partner “integrated seamlessly” into the agency rather than an outside vendor — makes genuine co-development possible and carries into the next period.

How the Model Works End to End: An Illustration. A single Maryland engagement shows how the model works. When **superintendent vacancies opened in more than half of Maryland’s districts**, **Assess**, a needs-sensing conversation with the State and its

superintendents' association, identified the problem (a thin leadership bench) and beneficiaries (new and aspiring leaders). **Plan** produced a co-designed, association-approved engagement with a logic model and measurable outcomes. **Implement** ran across tiers: an intensive partnership building the association's own capacity, including **its first strategic plan in 74 years**; a targeted year-long academy (seven 1.5-day sessions plus shorter sessions for sitting superintendents); and universal tools the association now owns. **Improve** tracked outcomes throughout. The capacity endured past the Federal partnership: **42 percent of academy participants were promoted** into senior district leadership, and members voted to **raise their own dues** to staff the sustaining plan, which was the clearest sign of durable, transferred capacity.

Who delivers: Partner Roles Across the Tiers. The Center is led by Policy Studies Associates with three partners mapped to the delivery model. SRI International and NORC at the University of Chicago bring nationally recognized content and capacity-building expertise, integrated directly into State delivery teams — as SRI and RMC Research were embedded in the R4CC teams, with NORC stepping into RMC's prior role. The Education Policy and Leadership Center (EPLC) is the Pennsylvania-specific delivery partner, extending reach through the Commonwealth's networks. Evaluation is carried by Center evaluator Derek Riley, independent of service delivery (section B.2), keeping delivery and measurement separate. The Center also draws on the National Comprehensive Center's expert cadre and other nationally recognized experts for specialized needs a given engagement requires.

Assuring Quality Across Every Tier. Quality is protected by a defined review discipline: client-facing drafts are reviewed by at least one person beyond the author; final products receive Center-director review and professional copy editing; and public-facing products meet 508 standards and all client requirements, branded with the required Department disclaimer. Quality

is also **measured** against explicit standards — **client-rated quality, usefulness, and relevance at or above Measure 1’s 85% threshold**; delivery fidelity checked against each project’s logic model and Annual Service Plan; and **on-time, complete delivery at or above Measure 3’s 80% threshold**. A reading below any standard is an off-track signal that runs through the same pre-specified decision rule in B.2, producing a documented correction on a fixed clock rather than a silent decline — the discipline behind five years of high client-rated quality across the same five jurisdictions, and what makes the Center’s technical assistance of sufficient quality, intensity, and duration to improve practice for students with the greatest need.

(b)(4) Coordination with Federal Investments and Similar Providers

Coordination is built into the operating model, not an add-on, because the Center’s value to a State depends on its services complementing — never duplicating — the other Federal and State TA the State receives. The Center coordinates along three lines: with **REL Mid-Atlantic** through joint planning and a joint advisory board; with the **National Comprehensive Center and Content Centers** for subject-matter expertise and to avoid duplicating national resources; and with **other Federal- and State-funded providers** so the State experiences coordinated rather than competing support. Each is described below as mechanisms with named touchpoints and cadences, and the partnership agreements that formalize them are provided to the Department on award.

The logic model (Exhibit 1) treats the National Center, Content Centers, REL Mid-Atlantic, and other Federal providers as inputs to every engagement, and the Assess process maps the providers already serving a State before any service is planned — so coordination begins at needs sensing, not after a project starts. This continues R4CC practice, where the Center held

joint needs-assessment meetings with the REL, attended one another's advisory board meetings, and delivered joint projects with the REL, National Center, and Content Centers.

Coordination with REL Mid-Atlantic

REL Mid-Atlantic is the Center's closest Federal partner, and the relationship is governed by two required mechanisms plus the joint work that flows from them.

Annual joint planning. Each year the Center and REL Mid-Atlantic conduct joint planning to align work in each State and region-wide — reviewing priorities, identifying where each provider is best positioned, deconflicting overlap, and agreeing who leads what — timed to feed the Center's Annual Service Plan and the REL's planning, so commitments are settled before service plans finalize. In the R4CC period the Center routinized this: the two met quarterly to review work and deconflict, conducted joint needs-sensing with State Chiefs (especially valuable with new leaders), and, where overlap surfaced — as on Maryland school improvement — held monthly project-lead syncs to align scope. The Center commits to the same architecture: an annual joint-planning cycle feeding the ASP, quarterly regional coordination, joint needs-sensing with Chiefs, and monthly project-lead syncs whenever topics overlap.

Joint Advisory Board under ETAA 203(g). The Center and REL Mid-Atlantic establish and maintain a joint advisory board meeting ETAA 203(g), designed to improve service delivery across both programs while reducing burden — a single coordinating table rather than two, so SEA leaders are not asked to advise the Center and REL separately on the same priorities. It convenes annually in person with interim virtual meetings, membership balanced across the five SEAs and both programs so every jurisdiction is represented; it reviews the providers' coordinated plans and progress and surfaces emerging needs. This consolidates into one board the coordination the Center practiced as R4CC — attending one another's advisory board

meetings and serving in the REL's accountability workgroup — as the FY2026 program now requires.

Joint development of State Learning Agendas. The Center partners with REL Mid-Atlantic — with National Center support as needed — to help each State develop, refine, and implement a multi-year Learning Agenda that identifies needs and sets priorities for evidence building and implementation. The approach is flexible to each State's starting point: refine an existing Agenda, build a new one, or work from a Strategic Plan where a State organizes priorities that way. In every case the State's own articulation of priorities drives the Center's Annual Service Plan. This is what makes coordination substantive: because the Center builds its ASP directly from the same Agenda the REL helps build, the two work from a shared, State-authored statement of need — the REL's strength in evidence building and the Center's in capacity-building implementation complementary by design. As the National Center's standardized Learning Agenda process and tools become available, the Center will use them rather than build a parallel approach.

Coordination: National Comprehensive Center and Content Centers

The Center coordinates with the National Comprehensive Center and the Content Centers both to draw on national expertise and to avoid duplicating national resources in the region.

Subject-matter expertise, including the National Center cadre. For every Annual Service Plan project, the Center partners with the client to identify and procure the needed expertise from a broad range of sources, drawing on the **National Center's subject-matter-expert cadre as a first-line national resource** before commissioning externally — improving quality and avoiding rebuilding expertise the National Center maintains. The R4CC record shows the practice both ways: a Center staff member led the National Center's multilingual-learners working group, and

the Center aligned a Maryland project to the English Learners Content Center’s toolkit rather than duplicate it. Looking ahead, the Center will coordinate with the FY2026 Content Centers by focus area — connecting its literacy work with the science-of-reading Content Center and its leadership and strategic-staffing work with the Emerging Needs Content Center — reaching out early to each to complement, not duplicate, national resources.

Avoiding duplication of national resources. Where the Center develops a broadly applicable regional resource, it coordinates national dissemination through the National Center rather than a parallel channel — as with the R4CC educator-shortage website, disseminated regionally and made available nationally through the National Center. The discipline runs both ways: during Assess, the Center checks whether a national resource already meets a State’s need before proposing to build one.

Coordination with other Federal- and State-funded Providers

Mid-Atlantic SEAs receive TA from many providers at once — other ED-funded centers, State-funded partners, foundations, and associations. The Center’s coordinating role, exercised through Assess, is to map that landscape for each State and position its work to fill genuine gaps rather than crowd an already-served space — the “reduce client burden” function the criterion calls for, and a documented R4CC strength: in New Jersey the Center facilitated a cross-agency working group across 16 NJDOE offices precisely because varying needs-assessment requirements were impeding districts. The Center’s value was coordination itself.

Coordination also extends to the Center’s own region-wide universal offerings. The Center’s two regional anchors, a Mid-Atlantic evidence-based literacy network and a Mid-Atlantic mathematics network focused on implementing high-quality math instructional materials, will be planned with REL Mid-Atlantic and, where relevant, the National Center and Content Centers,

so that a region-wide convening or network complements national and REL offerings rather than competing with them. Where a regional anchor touches a topic the REL is also advancing, the joint-planning mechanism and the State Learning Agenda determine who leads.

Partnership Agreements Provided to the Department

On award, the Center establishes and provides the Department partnership agreements with REL Mid-Atlantic, the National Comprehensive Center, and, as appropriate, other Department-funded providers. Because REL Mid-Atlantic is itself under competition this cycle, the Center will establish that agreement once the grant-period operator is in place. Each agreement defines how the parties meet the relevant Program Requirements — joint planning, the joint advisory board, Learning Agenda development, expertise sharing, and dissemination — so coordination is contractually grounded. Exhibit 5 summarizes the plan.

Exhibit 5. The Center’s Coordination Plan

Partner	Coordination Mechanism	Program Requirement / agreement
REL Mid-Atlantic	Annual joint planning; joint advisory board under ETAA 203(g); joint development of State Learning Agendas; joint needs sensing with Chiefs.	PROG REQ 6 & 7; partnership agreement provided to ED upon award (PROG REQ 9).
National Comprehensive Center	SME cadre as first-line expertise; national dissemination of regional resources; support to Learning Agenda development.	PROG REQ 8; partnership agreement provided to ED upon award (PROG REQ 9).
Content Centers	Align Center projects to Content Center resources/toolkits rather than duplicate; co-dissemination where relevant.	Absolute Priority coordination; agreements as appropriate (PROG REQ 9).
Other Federal/State providers	Landscape mapping during Assess; gap-filling rather than overlap; coordinated delivery to reduce client burden.	Absolute Priority “avoid duplication”; agreements as appropriate.

In summary, the Center will coordinate closely with REL Mid-Atlantic and other federal and state partners through joint planning, advisory boards, and partnership agreements to avoid duplication and fill service gaps. Coordination is a required—and proven—core capability, ensuring the Mid-Atlantic states receive streamlined, non-duplicative support.

(b)(5) Support from the Target Population

The proposed project is strongly supported by the populations it would serve — the State educational agencies of Delaware, the District of Columbia, Maryland, New Jersey, and Pennsylvania, and the districts and schools within them. That support is not assumed; it is documented. In preparing this application, the Center conducted structured needs-sensing conversations with senior leaders in all five jurisdictions, and from those conversations produced a co-designed service plan for each State built around the priorities its own leaders named. The clients defined the work; the Center organized around it.

Demand is documented, not assumed. The Center’s service design begins with the client, consistent with the requirement that services be client-driven and developed in partnership with State and local beneficiaries. For this application, senior officials across all five States — chiefs of staff, assistant and deputy superintendents, directors of research and school improvement, and division leads — participated in needs-sensing conversations that surfaced each jurisdiction’s highest-leverage problems. The engagement reached the most senior levels: in New Jersey, Commissioner Lily Laux, through Executive Director and Federal Liaison Diana Pasculli, reviewed and gave feedback on PSA’s draft needs-sensing and service-plan memo, directing revisions reflected in the State’s service plan.

Because the same team led this Center across these five States from 2019 to 2024, these conversations built on established relationships rather than starting cold, so the needs each State

surfaced are specific, current, and actionable: New Jersey named funding coherence across 590 districts; Delaware, educator-workforce scaling and a literacy decline from 52 to 38 percent proficiency; the District of Columbia, moving its 2026–2030 strategic plan into implementation; Maryland, Blueprint implementation and instructional coherence; and Pennsylvania, accelerating math and literacy in high-need, rural, and high-poverty schools under its strengthened funding formula.

States have already co-defined the work. The clearest evidence of client support is that the Center already has a **co-designed service plan for each of the five States**, each built directly from that State’s needs-sensing conversations and organized around the priorities the State named. Every plan is explicitly client-driven: the State names the high-leverage problems, and the Center builds an annual, State-approved plan around them, drawing on the State’s own learning agenda and data. The plans are summarized in Exhibit 6 and provided in full in the attachments.

Exhibit 6. State’s Service Plan built from that State’s own needs-sensing conversations.

State	Priorities the State named (client-defined)	Evidence of partnership
Delaware	Early literacy and the science of reading (Delaware Early Literacy Plan, K–3 training, HQIM); educator-workforce growth and retention; leadership pipeline; chronic absenteeism; and first-in-80-years funding reform.	Long PSA partnership history (Principal Network, Christina Leadership Academy); co-designed plan.
District of Columbia	Moving OSSE’s 2026–2030 strategic plan from publication into implementation — K–12 literacy and mathematics, birth-to-five early learning, post-secondary success (graduate profile, graduation requirements), special education, attendance, and cross-agency coordination.	Prior OSSE partnership (graduate profile, graduation requirements); co-designed plan.
Maryland	Blueprint implementation (career ladder, collaborative time, AIB-to-MSDE transitions); HQIM and	Substantial R4CC record (HQIM, CSI

State	Priorities the State named (client-defined)	Evidence of partnership
	instructional coherence; educator and leadership pipeline; and College and Career Pathways (Blueprint Pillar 3).	tools, PSSAM academies); co-designed plan.
New Jersey	Funding-formula modernization and efficient spending across 590 districts; literacy and the science of reading; high-impact tutoring; preschool expansion; cross-agency coordination; and strategic federal funds use (Maximizing Federal Funds).	NJDOE described PSA as “integrated seamlessly”; co-designed plan addressed to the Commissioner.
Pennsylvania	Accelerating math and literacy through structured literacy (materials, coaching, progress monitoring); implementing the strengthened adequacy formula (2023 Commonwealth Court ruling); educator recruitment and retention (PRISE, PEDC); career readiness (Career Ready PA); and high-need, rural, and high-poverty district support.	R4CC pipeline and school-improvement work (PEDC, PRISE, 60 facilitators); co-designed plan via PDE and 29 IUs.

Secured commitments. Support is further evidenced by written commitments at every level. At the State level, PSA received a **formal endorsement from Delaware Secretary of Education Cynthia Marten** and letters of support from New Jersey Commissioner Lily Laux, Pennsylvania Secretary Carrie Rowe, and District of Columbia State Superintendent Antoinette Mitchell — each the State’s chief education official — plus a letter from the Maryland Governor’s Office of Children. **Support spans all five jurisdictions.** Delaware’s endorsement also satisfies the Competitive Preference Priority, which a Regional Center meets on the endorsement of a single Governor or chief State education official. That demand is reinforced by regional and district commitments: in Pennsylvania, seven Intermediate Units and the executive directors of the Pennsylvania Association of Intermediate Units and the Pennsylvania Association of School Administrators; in Maryland, the Eastern Shore of Maryland Educational Consortium, the Talbot County superintendent, and the Calvert County Public Schools COO; and in Delaware, the Christina School District, a large, historically high-need urban district. Partner commitments

The management plan is feasible because it rests on an experienced leadership team with clearly

Exhibit C-1. Region 3 Comprehensive Center organizational structure.



The Center is led by two Co-Directors, each at 50 percent time and jointly accountable to the Department for overall performance — a structure PSA used in its 2019 award and now strengthens, dividing across two people the cross-cutting load Dr. Hildreth carried as sole Director from 2021 to 2024. Neither carries a single State; both hold cross-cutting responsibility across all five jurisdictions. Their domains are divided so every cross-cutting function has one clear owner:

■ **Jeanine Hildreth: Operations and External Coordination.** Dr. Hildreth directed the Mid-Atlantic Comprehensive Center from 2019 to 2024, so she owns the Center’s management spine and its Federal relationships from direct experience: budget and spending oversight, timelines and milestone tracking, staffing and resource allocation, compliance, the REL Mid-Atlantic coordination relationship and joint advisory board, the partnership agreements provided to the Department on award, and the Center’s participation in the national evaluation. She is the named owner of the resource-allocation and supervision questions the 2024 review found undescribed. Full qualifications appear in section C.3.

■ **Brian Eyer: Services and Quality.** Dr. Eyer delivered R4CC capacity-building services in Maryland, Delaware, and the District of Columbia from 2020 to 2024, so he owns the technical-assistance enterprise: the annual service-plan cycle, the quality and intensity of delivery across all five States and three tiers, the tiered-TA model, and the delivery side of the continuous-improvement loop. State co-leads work to him on service delivery and quality, and he is the final reviewer of deliverable quality before client delivery. All Center deliverables and convenings meet Section 508, WCAG 2.1 AA, and ADA standards (GEPA Section 427 statement). Full qualifications appear in C.3.

The two Co-Directors jointly own overall accountability to the Department, the needs-sensing-to-Annual-Service-Plan decision points, and personnel supervision. A split cross-cutting decision defaults to the Co-Director in whose domain it primarily falls (operations/resourcing to Operations; service design/quality to Services and Quality). Any genuinely cross-domain deadlock is resolved within five business days by PSA’s Principal, Leslie Anderson — except where it involves New Jersey, which she co-leads, in which case Principal Christina Russell arbitrates to avoid conflict. The Co-Directors’ collective 1.0 FTE meets the Department’s requirement that two Co-Project Directors commit at least 1.0 FTE collectively.

State Leadership: A Co-lead Pair for Every Jurisdiction

Each State is led by a dedicated co-lead pair — in nearly every case a PSA lead paired with an SRI or NORC co-lead. This is the integrated-partner model in operation: SRI and NORC co-lead State teams with PSA, sharing direct accountability rather than working alongside. The co-leads are the direct SEA points of contact and oversee all Center work in the State, anchoring the intensive tier, while the featured specialists deliver targeted and universal services and join intensive work when a State’s priorities call for their depth. Exhibit C-2 lists the assignments.

Exhibit C-2. State Co-Lead Assignments.

State	Co-lead pair	Integration / note
Delaware	Christina Russell (PSA, 30%) + Boris Granovskiy (NORC, 20%)	PSA + NORC; supervised within Services & Quality (Eyer)
District of Columbia	Yvonne Woods (PSA, 25%) + Paul Burkander (SRI, 20%)	PSA + SRI
Maryland	Tiara Booker-Dwyer (PSA, 30%; MD resident) + Hannah Cheever (SRI, 20%)	PSA + SRI; in-state leadership
New Jersey	Leslie Anderson (PSA, 30%) + Jenny Bitzer (PSA, 30%; NJ resident)	Two PSA co-leads, one a NJ resident — PSA holds the NJDOE relationship; see note below

State	Co-lead pair	Integration / note
Pennsylvania	Amy Morton (EPLC, 40%; EPLC subcontract lead) + Jenna Scott (NORC, 20%; PA resident, NORC subcontract lead)	EPLC + NORC; both subcontract leads; EPLC is the in-state PA delivery partner, Scott a PA resident

New Jersey is the one State co-led by two PSA staff rather than a PSA—partner pair, and deliberately so: PSA built and holds the NJDOE relationship the agency called “integrated seamlessly,” and an NJ-resident co-lead keeps the team in-State. Across the leadership team, Center staff reside in Maryland, New Jersey, Pennsylvania, and the District of Columbia — placing Center leadership as residents in four of the five jurisdictions served, satisfying the located-in-region expectation and giving the Center lived knowledge of the communities it serves.

Independent Evaluation

The Center’s evaluation function is held by Derek Riley as Center evaluator, who by design remains independent of service delivery. He does not co-lead a State or deliver capacity-building services, but gathers data from clients and recipients and prompts project teams to reflect on and improve their work, as described in section B.2. This separation keeps performance measurement credible and is the basis for the continuous-improvement loop that the management plan depends on.

Center communications and operations are coordinated by Diana Joyce as Communications/ Operations Lead, reporting to the Co-Director for Operations and External Coordination. She manages the Center’s internal and external communications, operational logistics, and the production schedule for deliverables and convenings, keeping the cross-State work on cadence and freeing the Co-Directors and State teams to concentrate on substance. Like the evaluation function, this role sits at the Center level rather than within any single State team.

Partners and the Prime-Subrecipient Structure

Policy Studies Associates is the prime recipient and holds overall authority and accountability for the Center, its deliverables, and its reporting to the Department. Three subrecipients are integrated into the work through the State co-lead structure above, each chosen for a specific reason rather than assembled ad hoc:

- **SRI International (Continuity Partner).** SRI partnered with PSA on the Mid-Atlantic Center from 2019 to 2024; carrying that relationship forward preserves tested working routines. SRI co-leads Maryland (Hannah Cheever) and the District of Columbia (Paul Burkander), and supplies three of the nine featured technical specialists across coaching, mathematics, and foundational literacy. Katrina Laguarda, the featured coaching and teacher-development specialist, serves as SRI's subcontract lead, accountable for SRI's performance under the subaward.
- **NORC at the University of Chicago (New Partner).** NORC will deliver integrated research-and-delivery, deepening the Center's capacity in literacy and assessment, multi-tiered systems of support and Learning Agendas, and mathematics and chronic-absenteeism frameworks. NORC co-leads Delaware (Boris Granovskiy) and Pennsylvania (Jenna Scott, who serves as NORC's subcontract lead and is a Pennsylvania resident) and supplies three featured technical specialists.
- **EPLC: The Pennsylvania-specific partner.** The Education Policy and Leadership Center extends the Center's reach through Pennsylvania's established networks. EPLC co-leads Pennsylvania (Amy Morton, EPLC's Executive Director and subcontract lead) and anchors the Commonwealth-specific delivery the State's scale and intermediate-unit structure require.

Each subaward is governed by the same controls as PSA’s own work: every subrecipient’s deliverables pass through the deliverable-approval chain below, and subaward spending is reviewed in the monthly task-by-task spending review. Each subaward’s designated subcontract lead is a senior member of the delivery team — NORC’s and EPLC’s leads (Scott and Morton) are also State co-leads, and SRI’s lead (Katrina Laguarda) is the Center’s coaching specialist — so those formally accountable for a subaward also deliver its work, eliminating any gap between contractual commitment and service delivery. Each partner’s letter of commitment obligates the firm to support the Center; subaward details appear in C.4 and the Budget Narrative.

How the Center Manages Staff, Resources, and Quality

Feasibility depends not only on who is responsible but on the mechanisms through which responsibility is exercised. PSA’s approach rests on clear leadership roles, a dedicated point of contact for each client, and frequent internal and client communication; both Co-Directors bring decades managing large teams, subcontractors, and partners. For more than 35 years PSA has deployed internal controls ensuring high-quality, on-time, immediately useful products. The Center carries forward that established set of controls, each with a named owner, answering the 2024 finding that supervision and resource oversight were undescribed:

- **A dedicated point of contact for each State.** Each State has a single named co-lead as its standing point of contact for all Center communication, so the agency always knows whom to reach and the Center stays continuously informed of needs and progress, which surfaces and addresses unanticipated problems early. Owner: State co-leads.
- **Per-State internal project-management plans.** For each State, the Co-Directors and the State co-leads develop an internal project-management plan specifying tasks, deadlines, and staff responsibilities. Close monitoring of that plan coordinates the team’s work, drives timely

delivery, and anchors quality assurance. Owner: Eyer (Services & Quality), with each State co-lead.

- **Monthly task-by-task spending review.** At the end of each month, the Co-Director for Operations and the PSA business office review a detailed, task-by-task spending report against projections, working with State co-leads to keep activities within budget. This is the concrete mechanism for the “within budget” half of the feasibility criterion. Owner: Hildreth (Operations), with the PSA business office.
- **Deliverable-approval chain.** State co-leads hold team members accountable for the quality of their contributions; the Co-Director for Services and Quality reviews all deliverables in draft, identifies revisions needed to meet technical standards, and approves final versions before client delivery. Owner: Eyer, with State co-leads.
- **Standing team cadence.** Within-State teams meet biweekly to review work in progress, surface emerging insights, and flag anything affecting timeline or resources; issues that cut across States are taken up in weekly Center-wide meetings. This cadence, combined with the continuous-improvement instruments in B.2 (monthly, quarterly, twice-yearly), is how the Center detects and corrects problems early.

Resource allocation is the explicit responsibility of the Co-Director for Operations, informed by the monthly spending review and continuous-improvement data rather than fixed at proposal time. Any task running more than ± 10 percent off projected spend, or any missed milestone, is escalated to the responsible Co-Director within five business days and logged for documented re-scope or reallocation; variances inside that band are managed within the plan. Symmetrically, any Program Performance Measure below 75 percent of its annual target at the quarterly review is escalated to the Co-Director for Services and Quality within five business days and triggers a

documented service-plan adjustment. Milestone status, spend variances, and escalations live in a single Smartsheet tracker — the Center’s system of record — that State co-leads update before each monthly review, where any “at-risk” or “late” flag triggers escalation; the same data roll into the quarterly and annual budget reports to the Department. Any change requiring prior approval under 2 CFR 200.308 (including cumulative direct-cost transfers over 10 percent of the total budget) goes to the program officer first, making the plan adaptive within budget across the 60-month period.

Annual Client-driven Service-plan Cycle

The Center’s work is organized around an annual, client-driven service-plan cycle. This is the process that makes the goals in section B.1 achievable on schedule. Each year, in each State, the cycle moves from needs sensing through a jointly developed Annual Service Plan into delivery, continuous improvement, and reporting, then back into the next year’s needs sensing. The Annual Service Plan is developed jointly with the SEA and approved by the State Chief, and each project within it carries the full set of required elements set out in Exhibit C-3.

Exhibit C-3. Required Elements of Annual Service Plans (PR1)

Required element	How the Center addresses it
High-leverage problems, including identified client needs	Surfaced through the five-step needs-sensing protocol (B.3) and the State Learning Agenda; stated as the problem each project addresses.
Capacity-building services	Universal, targeted, or intensive services across the four capacity dimensions (human, organizational, policy, resource), matched to need (B.3).
Time-based outcomes (short/mid/long-term)	Short- (1 yr), medium- (2–3 yr), and long-term (4+ yr) outcomes from each project logic model, per the goals in B.1.
Responsible personnel	The State co-lead pair and assigned team members, accountable through the deliverable-approval chain above.
Key technical-assistance partners	SRI, NORC, EPLC (PA), the National Center cadre, and REL Mid-Atlantic as coordinated; selected per project (B.4).

Required element	How the Center addresses it
Milestones and outputs	Defined in the internal project-management plan and tracked monthly; outputs include the deliverables enumerated in the logic model (B.6).
Dissemination plans	Project-level plans for sharing tools and results, coordinated with the National Center for broad reach (B.4).
Fidelity measures, where appropriate	Included in service plans where implementation fidelity is material, consistent with the implementation-science basis in B.3.
Prioritizing students/communities with highest needs (§203(e))	Every plan weights students from low-income families and CSI/TSI/ATSI schools under ESEA 1111(d), as the needs-sensing criteria require.

Timeline and Milestones Across the Project Period

The Center’s work follows a predictable annual milestone schedule across the up-to-60-month period, which is what makes on-time performance feasible: the cycle repeats each year, so milestones are known in advance and tracked against the internal project-management plans. Exhibit C-4a shows the recurring annual rhythm; Year 1 adds start-up and first sustainability-planning milestones, and the final year adds the sustainability hand-off and close-out. Each reporting milestone ties to the Center’s measurable objectives, so the schedule is the cadence for demonstrating progress, not activity for its own sake.

Those measures carry fixed Center-level targets — conservative floors the Center met or exceeded in every year of 2019–2024, set below demonstrated performance rather than at best-year peaks:

- client satisfaction at or above 85 percent;
- at least six recipient-group types served;
- at least 80 percent of milestones and outputs completed, with at least 80 percent client-reported implementation fidelity; and
- at least 75 percent of project short-term outcomes met, with at least 80 percent of clients reporting knowledge gains and at least 60 percent reporting application or improvement.

These targets track the Center’s four goals — accelerate math and literacy achievement, strengthen the educator and leadership pipeline, build SEA organizational and policy capacity, and improve resource capacity and evidence use — across the one-, two-to-three-, and four-plus-year outcome horizons.

Exhibit C-4a. Annual milestones to support on-time, on-budget service delivery

Period (each year)	Milestone	Owner
Q1 (Oct–Dec)	Annual Service Plan finalized and approved by each State Chief by October; intensive delivery under way in all five States; Q1 progress report to ED by December 30; Annual Evaluation Report (AER) to ED by December 30.	State co-leads; Eyer; Riley
Q2 (Jan–Mar)	Service delivery continues across all five States; monthly participant logs; mid-year continuous-improvement review and any triggered mid-course corrections; Q2 progress report by March 30.	State co-leads; Eyer; Riley
Q3 (Apr–Jun)	Service delivery continues; needs-sensing for the next year’s plan begins with each Chief and State Learning Agendas refined; Q3 progress report by June 30; Annual Performance Report (APR) to ED by April 30.	State co-leads; Eyer; Hildreth (REL coordination)
Q4 (Jul–Sep)	Service delivery concludes the program year; next year’s draft Annual Service Plans developed; joint advisory board for client and partner input on priorities and progress; Q4 progress report by September 30.	State co-leads; Co-Directors
Twice yearly	Center-level evaluation debriefings; after-action reviews for major projects; lessons propagated to Center-wide practice; participation in the national evaluation.	Riley; Co-Directors
Year 1 Q1 / final year	Start-up (staffing, partnership agreements to ED, baseline data) and initial sustainability planning in Year 1; sustainability hand-off and close-out in the final year.	Co-Directors

The recurring cadence in Exhibit C-4a stays constant, but the project period is not five identical years; the milestones that mark progress advance year-over-year, tracking the short-, medium-, and long-term outcomes in B.1. These engagement-specific deliverables (Exhibit C-4b) and their dates are set in each year’s client-negotiated Annual Service Plan, as the client-driven design requires; fixing them at proposal time would pre-empt the needs-sensing the program mandates.

Exhibits C-4a–C-4b therefore schedule the milestones the Center controls — the service-plan cycle, evaluation and reporting, and the one-time start-up, mid-grant, and close-out events.

Exhibit C-4b. Distinguishing milestones and how each year advances beyond the recurring cycle

Project year & Phase	Distinguishing milestones (beyond the recurring annual cycle)	Target (from award)
Year 1 — Establish & baseline	Cooperative agreement executed and Center launched (e.g., staffing, subawards); partnership agreements filed with ED and baselines set for the four Program Performance Measures; first Annual Service Plans approved, each with an ownership-transfer plan; intensive partnerships under way in all five States, with short-term capacity outcomes first measured.	Launch Month 1; baselines & agreements Month 3; first Service Plans Month 4
Year 2 — First full cycle	Medium-term outcome tracking established; first full annual outcome cycle reported against the PPM targets across engaged agencies.	Tracking by Month 18; first full report Month 24
Year 3 — Mid-grant review	Mid-grant performance review against medium-term (two-to-three-year) practice-change outcomes; service intensity revisited with each SEA as capacity grows; evidence products disseminated through the National Center.	Review by end of Q2 (≈ Month 30)
Year 4 — Sustainability ramp	Ownership-transfer plans move to active hand-off; State-led continuous-improvement routines begin shifting toward full State ownership; long-term (four-plus-year) outcome indicators first assessed.	Long-term indicators by Month 48
Year 5 — Institutionalize & close out	Sustainability hand-off completed with each SEA; summative evaluation against long-term targets; close-out reporting and knowledge transfer to States and the National Center.	Hand-off by Q3; summative ≈ Month 57; close-out Month 60

Year 1 front-loads start-up so delivery begins on schedule. Within 30 days of award, the Co-Directors execute the partnership agreements and provide them to the Department, confirm staffing and subaward execution, and convene the full team; by day 60, co-leads complete initial needs-sensing with each Chief and the Center sets baseline data for the four Program Performance Measures; and by day 90, the first Annual Service Plans are drafted with each SEA, positioning

Chief approval and delivery early in Year 1. These start-up milestones are owned by the Co-Directors, with co-leads accountable for State-level needs-sensing and planning.

Managing risk: keeping delivery on time and within budget

Because the proposed leaders operated this Center for five years, the plan anticipates the conditions that most often threaten on-time, on-budget delivery and pairs each with a planned response and a named owner — executed through the management mechanisms above rather than improvised when a problem arises.

- **Changes in SEA leadership or shifting State priorities.** Chiefs and senior staff turn over, and priorities move with them. The annual needs-sensing cycle and each Chief's re-approval of the Annual Service Plan re-anchor the work to current priorities every year, and because co-leads hold relationships across an agency rather than with a single official, a leadership change does not sever the partnership. Owner: State co-leads, with Eyer.
- **Loss of a Co-Director or State co-lead.** Each State is led by a pair, the nine specialists provide cross-State depth, and PSA's senior staff and partner firms supply named backups. If a Co-Director seat opens, a PSA Principal (Anderson or Russell) steps in; any co-lead seat is held by its paired co-lead and the specialist pool until PSA names a replacement from its senior bench, and SRI and NORC each designate a co-lead successor, so transitions carry no gap in client coverage. Because the team is fully staffed, no key role depends on a future hire. Any successor must meet the incumbents' standard — an advanced degree in a relevant field, substantial SEA/LEA capacity-building experience, and demonstrated content and relationship expertise — and any key-personnel change is submitted for prior approval under 2 CFR 200.308. Owner: Hildreth, with the Co-Directors.

- **Subaward or partner underperformance.** Because each subcontract lead is a senior member of the delivery team, the people accountable for a subaward are the people delivering its work; performance is visible through the deliverable-approval chain and the monthly task-by-task spending review, and resourcing can be reallocated when needed. Owner: Eyer for quality and Hildreth for spending.
- **A State disengaging or low service uptake.** Services are co-defined with the SEA and approved by the Chief, so engagement is built in; the standing team cadence surfaces weak uptake early, and the Co-Directors escalate directly to the Chief to recommit or re-scope the plan. Owner: State co-leads, escalating to the Co-Directors.
- **Schedule or budget slippage on a project.** The monthly spending review against projections and the quarterly continuous-improvement data detect drift early and trigger a documented mid-course correction or reallocation through that review, keeping the project on time and within budget. Owner: Hildreth, with State co-leads.

Securing Client and Partner Commitments

Each cycle, the Center demonstrates that clients are engaged in defining services and that commitments to carry out the Annual Service Plan are secured. Engagement is built in: services are co-defined with the SEA through needs sensing and the Learning Agenda, and the State Chief approves the Annual Service Plan — the documented commitment that the plan reflects State-identified needs and priorities. Partner commitments from SRI, NORC, and EPLC are shown by their letters of commitment (Appendix) and reinforced by each partner’s co-lead role in the State teams, so those accountable for the work are also formally committed to it; the corresponding subawards and partnership agreements are executed after award.

Participation in the National Evaluation

The Center participates fully in the national evaluation of the Comprehensive Centers Program. Its own performance-management and continuous-improvement system (B.2) is designed to produce the data the national evaluation requires, including the four Program Performance Measures, reported on ED’s schedule, and the Center evaluator, who served on ED’s cross-Center Evaluation Workgroup, is positioned to align the Center’s measures with national ones. Responsibility for national-evaluation participation sits with the Center Evaluator.

Taken together, the management plan is feasible on its face: every function and every State has a named, accountable owner; the partner firms are integrated into State leadership rather than appended to it; and the mechanisms governing supervision, spending, and quality are established practices the proposed leaders used operating the Mid-Atlantic Center from 2019 to 2024. The annual service-plan cycle gives the work a predictable, on-schedule rhythm, and the milestone timeline, monthly spending review, and continuous-improvement loop keep the Center on time and within budget.

(c)(2) Time Commitments of the Project Directors and Key Personnel

The time commitments below are appropriate and adequate. Center leadership is anchored by two Co-Project Directors at 0.50 FTE each — a 1.0 FTE collective commitment meeting the Department’s requirement — supported by dedicated State co-leads and the Center Evaluator. These reflect a known, tested workload, not an estimate: the Co-Directors and every PSA State co-lead, plus an SRI co-lead, served on the Mid-Atlantic Comprehensive Center in 2019–2024. The FTE for each individual match the Budget Narrative (C.4) and ED 524-A, Line 1, and the 5.90 total reconciles across all three.

Exhibit C-5. Time commitments of Center leadership and key personnel.

Person	Role	FTE / time
Jeanine Hildreth	Co-Project Director — Operations & External Coordination (MD resident)	0.50 FTE
Brian Eyer	Co-Project Director — Services & Quality (MD resident)	0.50 FTE
Christina Russell	DE co-lead (PSA; DC resident)	0.30 FTE
Boris Granovski	DE co-lead (NORC)	0.20 FTE
Yvonne Woods	DC co-lead (PSA)	0.25 FTE
Paul Burkander	DC co-lead (SRI)	0.20 FTE
Tiara Booker-Dwyer	MD co-lead (PSA; MD resident)	0.30 FTE
Hannah Cheever	MD co-lead (SRI; DC resident)	0.20 FTE
Leslie Anderson	NJ co-lead (PSA)	0.30 FTE
Jenny Bitzer	NJ co-lead (PSA; NJ resident)	0.30 FTE
Amy Morton	PA co-lead (EPLC; EPLC subcontract lead; PA resident)	0.40 FTE
Jenna Scott	PA co-lead (NORC; PA resident)	0.20 FTE
Featured technical specialists (9): Katrina Laguarda, Kerry Friedman, Anna Jennerjohn, Claudia Gentile, Mollie Rubin, Julie Meredith, Karen Gray-Adams, Roseline Telfort, Dan Aladjem	Cross-tier content specialists; surge across States and tiers as priorities require (qualifications in C.3)	0.20 (all)
Derek Riley	Center Evaluator (PSA)	0.20 FTE
Diana Joyce	Communications/Operations Lead (PSA)	0.25 FTE

Adequacy of Staff Time Commitments

The commitments are adequate for three reasons. First, **leadership meets the program standard with no gap**: two Co-Project Directors at 0.50 FTE provide the required 1.0 FTE collective commitment, with divided domains (operations/coordination and services/quality) giving the full management load dedicated senior coverage. Second, **every State has dedicated co-lead time** — each jurisdiction served by a co-lead pair with committed FTE sized to its assessed need, the nine specialists adding cross-State content depth on funded time. Third, the commitments are **calibrated from direct experience**: the Co-Directors and PSA co-leads (and an SRI co-lead) ran this work in 2019–2024, so the FTE reflect the real time it takes. In total the

Center commits exactly **5.90 FTE**: a PSA co-lead at 0.30 FTE carries one jurisdiction’s full annual cycle, with the paired partner co-lead adding depth; each Co-Director’s 0.50 FTE covers the cross-cutting load across all five States; the nine specialists commit 0.20 FTE each (**1.80 FTE**), deployed against intensive peaks wherever they fall; and the Evaluator’s 0.20 FTE — the level Riley carried in 2019–2024 — covers data collection, the continuous-improvement instruments, and national-evaluation alignment. Detailed qualifications appear in C.3, and each commitment’s cost basis in the Budget Narrative (C.4).

(c)(3) Qualifications of Key Personnel

The Center’s key personnel are exceptionally well matched to the work, combining formal training in the fields the project addresses — literacy and the science of reading, mathematics instruction, coaching and adult learning, leader development and principal pipelines, school finance, impact evaluation and data use, and school improvement — with deep, direct experience inside State and local education agencies. Consistent with the program’s Note, the Center reads the “target population” as the universe of Comprehensive Center clients (SEAs and the LEAs and schools they serve), and many personnel bring lived experience of it: former teachers, principals, district leaders, and SEA officials, and residents of the jurisdictions served. The team is organized in three groups: two Co-Directors, State co-leads, and nine featured technical specialists.

Center Leadership: the Co-Directors

The Center’s two Co-Directors are its most consequential personnel, and both have direct experience operating this Center in this region during the 2019–2024 period — the clearest evidence that they are qualified to run it.

Jeanine Hildreth (Co-Director – Operations & External Coordination). Dr. Hildreth directed the Mid-Atlantic (Region 4) Comprehensive Center from 2019 to 2024 — as Co-Director, then Director from 2021 — and continues in Center leadership for R3CC. She holds a Ph.D. in Education Policy and Research from the University of Maryland (earned while Director of Research for Baltimore City Public Schools), with 25+ years designing and managing capacity-building technical assistance and mixed-methods evaluation for SEAs, the Department, and national organizations. Her qualifications are demonstrated: as R4CC Director she managed the relationships with REL Mid-Atlantic and the Department, oversaw staffing and subcontractors, met all Federal operational and reporting requirements, and conducted needs sensing across the region — with the Center meeting its short-term goals more than 90 percent of the time each year and 90-plus percent of participants reporting capacity gains annually.

Brian Eyer (Co-Director – Services & Quality). Dr. Eyer was a key member of the R4CC team from 2020 to 2024, delivering capacity-building services in Maryland, Delaware, and the District of Columbia. He brings 30+ years across the target population’s own roles: classroom teacher, assistant principal, transformational principal (Digital Harbor High School, grown from 850 to 1,500 students), principal supervisor of 14 Baltimore schools, MSDE Leadership Development Specialist, and state CTE budget manager. For R4CC he developed the Aspiring Superintendents Academy with PSSAM and customized leadership programs with DDOE and Maryland districts. At MSDE he co-authored the Professional Standards for Educational Leaders Rubric, the Principal Evaluation Guidebook, and the Leadership Coaching Guide, and established academies for principals in the State’s lowest-performing (CSI/TSI) schools.

State Co-Leads: The Intensive-Tier Backbone

Each State is anchored by co-leads who carry the deep, sustained SEA relationship and, in most cases, in-region residence and prior Mid-Atlantic Center experience.

<p>Delaware: Christina Russell (PSA) and Boris Granovskiy (NORC).</p>	<p>Russell, a PSA Co-Owner and Principal (Ed.M., Harvard) and a District of Columbia resident, brings 25+ years of technical assistance and mixed-methods evaluation and worked directly with the Delaware Department of Education on performance-management systems during R4CC. Granovskiy, a NORC Research Scientist (Ph.D.), has been a Comprehensive Center state co-lead across three regions in exactly Delaware’s priority content — chronic absenteeism, literacy-plan implementation, and mathematics instructional frameworks — with a change-management certification grounding him in improvement science.</p>
<p>District of Columbia: Yvonne Woods (PSA) and Paul Burkander (SRI).</p>	<p>Woods, a PSA Senior Research Associate (Ed.M., University of Illinois), brings 15+ years of mixed-methods research and capacity-building TA and provided embedded assistance to the DC Office of the State Superintendent of Education during R4CC — social-studies standards revision, the districtwide Graduate Profile, special-education and school-improvement policy, and revised graduation requirements — grounding her DC role in current agency relationships. Burkander, a Senior Education Researcher at SRI (Ph.D., Economics), adds firsthand DC Public Schools knowledge as co-PI on the REL Mid-Atlantic evaluation of DCPS Advanced Placement policies and causal-design rigor as a What Works Clearinghouse reviewer.</p>
<p>Maryland: Tiara Booker-Dwyer (PSA) and Hannah Cheever (SRI).</p>	<p>Booker-Dwyer, a Maryland resident, brings rare lived experience of the target population: a former MSDE Assistant State Superintendent and Virginia Deputy State Superintendent, elected school-board chair, and former science teacher, with command of the agency, district, and school levels, she led Blueprint implementation support that roughly 90 percent of Blueprint Coordinators rated helpful, and brings Pennsylvania experience facilitating a cross-sector STEM-educator coalition for Philadelphia. Cheever, a Senior Education Researcher at SRI (M.P.P., Harvard), brings a decade of TA in close partnership with state and district leaders and delivered directly in Maryland for the prior Center — the aspiring-superintendent and Calvert County principal academies, the PSSAM strategic plan, and the K–16 work-based-learning framework — and, as REL Appalachia’s working-in-partnership lead, conducts the needs-sensing and evidence-use facilitation the intensive model depends on.</p>

New Jersey: Leslie Anderson (PSA) and Jennifer Bitzer (PSA).	<p>Anderson, a PSA Co-Owner and Principal (M.P.P., University of Chicago), brings three decades directing evaluation and capacity-building and co-led the NJDOE partnership during R4CC, including the cross-agency needs-assessment system spanning 16 NJDOE offices and the 2023 standards rollout. Bitzer, a New Jersey resident, is a former classroom teacher, instructional coach, Dean of K–2, and Director of Academics, bringing direct experience inside the schools the Center serves plus the professional-learning and continuous-improvement facilitation the State teams depend on. New Jersey is deliberately led by two PSA staff rather than a PSA-partner pair (see C.1): PSA built and holds the NJDOE relationship, and Bitzer adds in-State residence.</p>
Pennsylvania: Amy Morton (EPLC) and Jenna Scott (NORC).	<p>Few know Pennsylvania’s education system from more vantage points than Morton, EPLC’s Executive Director and subcontract lead: she served PDE as Executive Deputy Secretary, Deputy Secretary for K–12, and briefly Acting Secretary across three administrations, led two Intermediate Units, and built Pennsylvania’s Leadership Development System. Scott, a Pennsylvania resident, NORC Vice President (Ph.D.), and NORC’s subcontract lead, brings 15+ years of capacity-building and evaluation, began as a Maryland teacher, and directed the congressionally mandated federal evaluation of the Comprehensive Center and REL programs — uncommon command of what effective CC technical assistance requires.</p>

Featured Technical Specialists

Nine featured technical specialists supply the content expertise behind the Center’s services, each a recognized authority in a field the project requires. They span all three tiers and are balanced across the partner firms — three SRI, three NORC, three PSA — profiled below by the lane they anchor, concentrated where the FY2026 Absolute Priority sits. Several have uncommon command of the Comprehensive Centers program itself, including Laguarda, who designed the first national CC evaluation, and Scott, who directed the federal CC/REL evaluation.

Mathematics instruction, Kerry Friedman (SRI).	<p>Dr. Friedman anchors the mathematics-instruction lane at the center of the FY2026 Absolute Priority. She holds an M.P.P. from George Washington University, is a What Works Clearinghouse–certified reviewer, and a former teacher. For</p>
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	REL Appalachia she designed and led the Community Math Nights coaching model across 70+ schools, has authored IES practice toolkits for scaling evidence-based mathematics instruction, and currently leads a National Center mathematics project — current, hands-on command of the math-instruction evidence base SEAs are working to implement.
Foundational literacy and the science of reading: Anna Jennerjohn (SRI).	Dr. Jennerjohn anchors foundational literacy and the science of reading, the other half of the Absolute Priority. She holds a Ph.D. in literacy education and brings 20 years as researcher, classroom teacher, literacy coach, and TA provider — a span that translates reading science into agency- and school-level practice. Her work centers on decoding, encoding, and phonemic-awareness professional development and the PRESS multi-tiered reading-support framework from early grades through adolescence, and she co-authored a Baltimore City reading brief guiding district literacy strategy.
Literacy and assessment: Claudia Gentile (NORC).	Dr. Gentile complements the Center’s foundational-literacy work with deep expertise in literacy assessment and measurement. She holds a Ph.D. in English education, brings 25+ years of evaluation with a capacity-building emphasis, and specializes in valid, reliable instruments — building early-literacy profiles for New Jersey and New York and leading literacy and assessment work for the Central Comprehensive Center, pairing literacy depth with the measurement rigor the continuous-improvement model depends on.
Coaching and teacher development: Katrina Laguarda (SRI).	Dr. Laguarda, SRI’s subcontract lead, is among the nation’s leading authorities on instructional coaching and adult learning. She holds an Ed.M. from Harvard, directed or co-directed seven federal randomized evaluations of coaching for the New Teacher Center, and authored “Designing Instructional Coaching.” She also designed the first national evaluation of the Comprehensive Centers program — rare command of both the coaching evidence base and what effective CC technical assistance requires.
Leader development and principal pipelines: Mollie Rubin (PSA).	Dr. Rubin anchors the leadership-development and principal-pipeline lane. She holds a Ph.D. from the University of Pennsylvania, co-authored multiple Wallace Foundation principal-pipeline reports, and researches principal supervisors and assistant principals. Her toolkit — talent analytics, Plan-Do-Study-Act cycles, and networked-improvement methods — equips her to help SEAs build and study their own leadership pipelines rather than depend on outside delivery.
Impact evaluation and data use: Julie Meredith (PSA).	Dr. Meredith anchors the data-use and continuous-improvement function. She holds a Ph.D. from the University of Pittsburgh and brings 15+ years evaluating accountability systems and

	reform, with command of experimental, quasi-experimental, multilevel, difference-in-differences, regression-discontinuity, and geospatial methods. She specializes in low-burden data-collection routines agencies can sustain themselves — what lets the Center’s continuous-improvement engine run on data SEAs actually generate.
Learning Agendas and MTSS: Karen Gray-Adams (NORC).	Ms. Gray-Adams anchors the Learning Agenda and multi-tiered-system-of-support work. She provides capacity-building TA on K–16 systems, MTSS, and strategic planning, serves as NORC’s Central Comprehensive Center Deputy Director, and coached states through the federal Learning Agenda Pilot. As a Maryland Blueprint researcher she brings direct knowledge of one of the region’s most consequential reform agendas.
Chronic absenteeism and mathematics frameworks: Roseline Telfort (NORC).	Dr. Telfort reinforces the Center’s mathematics capacity and leads its chronic-absenteeism lane. A Senior Research Scientist applying AI and machine-learning methods to education, she has delivered chronic-absenteeism and mathematics instructional-framework TA to state agencies and served as a College- and Career-Readiness task lead for the Blueprint for Maryland — so the Center’s mathematics depth does not rest on a single specialist.
School improvement and turnaround: Dan Aladjem (PSA).	Dr. Aladjem anchors the school-improvement and turnaround lane, directly relevant to the CSI/TSI/ATSI schools the Center prioritizes. Managing Director of PSA and chair of its Institutional Review Board, he brings 20+ years leading large-scale federal, state, district, and foundation projects aimed at changing students’ classroom experiences, spanning school improvement and turnaround, state and district policy, and teacher development. He holds an A.B. and A.M. from Stanford and a Ph.D. from the University of Southern California.

Mathematics expertise is deliberately distributed rather than resting on one specialist: Friedman anchors the lane, reinforced by co-leads Granovskiy (instructional frameworks) and Booker-Dwyer (STEM standards) and specialist Telfort. More broadly, the Center’s content depth is concentrated where the FY2026 Absolute Priority focuses — mathematics (Friedman, Granovskiy, Booker-Dwyer, Telfort) and literacy spanning foundational reading and the science of reading (Jennerjohn) and assessment (Gentile), reinforced by Granovskiy on literacy-plan implementation — so the team’s depth aligns directly with the priority.

Representation and Lived Experience of the Target Population

The FY2026 criterion asks not only whether personnel are qualified but whether they represent or have lived experience of the target population. The team is unusually strong here: former SEA officials (Booker-Dwyer, a former Assistant State Superintendent; Morton, a former PDE Acting Secretary and Intermediate Unit Executive Director), an elected school-board chair (Booker-Dwyer), and many former teachers, principals, coaches, and district leaders (Bitzer, Scott, Friedman, Jennerjohn, Rubin, Riley, Cheever). The team is physically in the region — Maryland residents include both Co-Directors (Hildreth, Eyer) and co-lead Booker-Dwyer; the District of Columbia, co-leads Russell and Cheever and specialists Laguarda, Meredith, Rubin, and Aladjem; New Jersey, co-lead Bitzer; Pennsylvania, co-leads Scott and Morton — placing in-region staff, including top leadership, in four of the five jurisdictions. Delaware is anchored by demonstrated command of its agency: Russell worked directly with DDOE on performance-management systems, and Granovskiy brings Comprehensive Center experience across three regions in Delaware’s priority content areas. This is what lets the Center understand each client’s context from the inside and earns the trust embedded assistance depends on.

Detailed time commitments for each individual are in section C.2; resumes are in the Appendix.

(c)(4) Budget Adequacy and Reasonableness of Costs

The Center’s budget is adequate to support the proposed work, and its costs are reasonable in relation to the Center’s objectives, design, and potential significance. It is built to deliver the full scope described here — intensive embedded partnerships in all five States, targeted cross-State cohorts, and universal region-wide resources, supported by the leadership, specialists, and continuous-improvement engine of C.1–C.3 — within the maximum award for Region 3.

Detailed costs by category and year appear in ED Form 524 and the Budget Narrative; this section addresses why they are adequate and reasonable.

Adequacy: The Budget Supports the Proposed Design

The budget is adequate because each cost category is tied to the work the design requires, with the basis for each in the Budget Narrative. Personnel costs fund the two Co-Directors, the State co-lead pairs, the nine specialists, the Evaluator, and the Communications/Operations Lead at the C.2 commitments; subawards fund the integrated roles of SRI, NORC, and EPLC; and non-personnel costs fund the travel, materials, and meeting support that on-site intensive TA and cross-State convenings require. The travel line is lean by design: it covers only incremental out-of-area PSA travel — the Co-Directors and co-leads live in four of the five States, so most on-site SEA work incurs minimal grant travel — and partner travel sits in the Line 8 subawards. On-site intensity does not taper: the Center funds four site visits per jurisdiction every year through closeout. Within the **\$5,345,000 subaward total**, SRI and NORC hold **\$2,485,000 each** and EPLC **\$375,000** for Pennsylvania, at standard institutional rates, with the Year-5 total stepping down \$30,000 as effort tapers in the sustainability-transition year. Consistent with the Regional Center role, roughly **60 percent of the budget supports the intensive tier**, 30 percent targeted cross-State services, and 10 percent universal products. The total request falls within the Department's Region 3 maximum annual award of **\$2,293,378**; annual budgets of \$2,271,969, \$2,240,920, \$2,260,531, \$2,284,120, and \$2,290,258 stay within the ceiling every year and total **\$11,347,799**.

Full per-year line detail — personnel and fringe by individual, travel by trip, and other direct costs by item — appears in the ED 524-A budget worksheet submitted with this application. The 5 percent emerging-needs set-aside (\$567,390 over five years) is carried as a discrete line with no indirect charged on it. Indirect costs are 15 percent of a Modified Total Direct Cost base of

\$4,856,878 (personnel, fringe, travel, and other direct costs plus the first \$50,000 of each subaward), so indirect applies to almost none of the subaward total.

Reasonableness and cost-effectiveness [APP REQ 5]

Costs are reasonable in relation to the project's objectives and design for four reasons:

- **The tiered service model is itself a cost-effectiveness strategy.** Universal and targeted services spread the Center's fixed expertise across many clients at low marginal cost, while the more expensive intensive services are reserved for the high-leverage problems where embedded support is warranted — matching dosage to need is how the Center maximizes reach per dollar (B.3).
- **Specialist time is tiered to match use, not carried as fixed cost.** The nine specialists are each committed at 0.20 FTE, matched to expected use: each anchors a content lane that surges into a State's intensive work when priorities call and otherwise serves the region through targeted cohorts and universal products, while the year-round State relationship is carried by the co-lead pair — keeping deep expertise available without paying for rarely-used capacity.
- **Established relationships reduce start-up cost.** Because the team already knows each State's leadership, priorities, and in-progress work, the budget does not carry the first-year ramp-up a new entrant would require; resources go to delivery sooner.
- **Costs align to market expectations.** Personnel, subaward, and other direct costs reflect each organization's established institutional rates — the same rates PSA and its partners charge across their federal and non-federal work, not rates set for this competition — so the budget carries no grant-specific markup and aligns to market expectations for comparable capacity-building TA (Budget Narrative).

Emerging-Needs Set-aside [APP REQ 7]

The budget includes a line item setting aside five percent of the annual grant amount to support emerging needs consistent with the project’s intended outcomes. This is both a compliance requirement and a design strength: it lets the Center respond to needs that arise mid-cycle, such as a new State priority, a leadership transition, an unanticipated implementation barrier, without disrupting committed work, reinforcing the responsiveness that the continuous-improvement model (B.2) is built to detect.

Indirect Costs

The budget applies the 15 percent de minimis indirect rate on modified total direct costs (MTDC) under 2 CFR 200.414(f). PSA holds no current Federal negotiated rate; under that provision as revised effective October 1, 2024, any recipient without a current rate may elect the de minimis, and PSA so elects. Because MTDC counts only the first \$50,000 of each subaward, PSA’s indirect applies to almost none of the subaward dollars — directing a high share of every Federal dollar to direct service in the five States.

Reasonable in Relation to Potential Significance

Finally, the costs are reasonable in relation to potential significance: the Center leaves behind durable State capacity — systems, leadership pipelines, and improvement routines that outlast the Federal partnership — rather than one-time services. Itemized costs, cost-effectiveness, and emerging-needs (APP REQ 5 and 7) appear in ED Form 524 and the Budget Narrative.

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Data Sources

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Delaware Department of Education (DeSSA/Smarter Balanced); Maryland State
Department of Education (MCAP); New Jersey Department of Education (NJSLA);
Pennsylvania Department of Education (PSSA).

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<https://www.nationsreportcard.gov>

Individual Resumes for Project Director & Key Personnel

JEANINE L. HILDRETH

Managing Director | Policy Studies Associates, Inc.

Senior education research and technical assistance leader with more than 25 years of experience designing and managing capacity-building TA and mixed-methods evaluation for state education agencies, the U.S. Department of Education, foundations, and national organizations. Managing Director at Policy Studies Associates and former Director of the Mid-Atlantic (Region 4) Comprehensive Center (2019–2024), where she led TA serving Delaware, the District of Columbia, Maryland, New Jersey, and Pennsylvania—ensuring positive relationships with state and local partners, meeting all federal operational and reporting requirements, and overseeing the design and implementation of state service and project plans. Her work helps states and districts design and implement evidence-based policies and practices across capacity-building technical assistance, leader development, the educator workforce, college and career readiness, federal and state funding and resource allocation, and student attendance and engagement—grounded in the use of evidence and stakeholder voice to inform policy change.

Areas of Expertise

- **Comprehensive Center leadership.** Direction of a Mid-Atlantic Comprehensive Center serving five states, with responsibility for state and local partnerships, federal operational and reporting compliance, and design and implementation of state service and project plans.
- **Capacity-building technical assistance to SEAs and education agencies.** Long-term partnerships with state and city agencies—including SEAs in DE, DC, MD, NJ, and PA, NYSED, and major foundations—to identify priorities, leverage research and partnerships, and deliver TA—including coaching and professional learning grounded in adult learning principles—that builds capacity for evidence-based policy and practice.
- **Leader development & principal pipelines.** Team member on principal-development evaluations including the University of Maryland's SEED-funded School Improvement Leadership Academy and Baltimore's Growing Great Leaders principal pipeline initiative.
- **Educator workforce development.** Region 4 CC-led work to strengthen the educator pipeline in Pennsylvania and to support effective instructional practices in K-12 schools and higher education.
- **College & career readiness.** Multi-state, mixed-design evaluation of College Summit; development of Washington, DC's first districtwide Graduate Profile and Maryland's Work-Based Learning Continuum; evaluation of Abell Foundation Performance-Based Scholarship initiative and BGCA career and post-secondary programs.
- **Funding & resource allocation.** Direction of TA on Maryland's Blueprint for Maryland's Future implementation and on innovative measurement in philanthropic grantmaking; profiles of School Improvement Grant strategies.
- **Student attendance & engagement.** Evaluation of Baltimore's Transformation Schools initiative, Wheaton/Watkins Mill afterschool programs for newcomer students, Colorado peer-mentoring dropout prevention, and BGCA Be Great 9th Grade Cohort transitions.
- **Community schools & family engagement.** Lead evaluator for Fordham's Community Schools Technical Assistance Center (CS-TAC) for NYSED, the Children's Aid Society Parent Leadership Initiative, and the Annie E. Casey Foundation's Baltimore community high school expansion.

Selected Project Experience

Comprehensive Center Leadership: Building SEA and LEA Capacity Through Technical Assistance, Coaching, and Professional Learning

- **Region 4 (Mid-Atlantic) Comprehensive Center, Director (U.S. Department of Education, 2019–2024).** Directed the Region 4 Comprehensive Center serving Delaware, the District of Columbia, Maryland, New Jersey, and Pennsylvania. Key duties included ensuring the development of positive relationships with state and local educational agencies; ensuring that all federal operational and reporting requirements were met; and overseeing design and implementation of state service and project plans. Coordinated projects spanning literature and research reviews and interviews with subject-matter experts and a range of stakeholder groups to inform state

and local policy change. For each year of its operation, the Mid-Atlantic Center met its short-term goals more than 90 percent of the time, and annually more than 90 percent of participants in Center activities reported skill and/or knowledge improvements in one or more capacity building indicator areas.

- **Pennsylvania educator workforce consortium (Region 4 CC).** Led a multi-year project with a Pennsylvania consortium to help strengthen the educator pipeline in the Commonwealth and to support effective instructional practices in K-12 schools and in colleges and universities. Center staff also supported the Commonwealth's work to develop guidance on supporting all students in schools and districts.
- **Washington, DC Graduate Profile (Region 4 CC, OSSE).** Led the development of Washington, DC's first districtwide graduate profile, identifying the experiences students need to develop the content knowledge and skills to succeed in high school and beyond.
- **Maryland Work-Based Learning Continuum (Region 4 CC, MSDE).** Led development of the Work-Based Learning Continuum for MSDE, providing research-based strategies for developing workplace skills from the elementary grades through high school.
- **Maryland Blueprint stakeholder engagement (Region 4 CC, MSDE).** Analyzed survey and focus group data collected by MSDE to inform the development of the state's strategic plan for implementing The Blueprint for Maryland's Future.
- **High-quality instructional materials procedures (Region 4 CC, MSDE).** Supported MSDE on the development of new procedures for identifying and implementing high-quality instructional materials for schools and districts.
- **Special education for incarcerated youth (Region 4 CC, OSSE).** Supported the District of Columbia Office of the State Superintendent of Education in ensuring that incarcerated youth received legally required special education services.
- **Fordham Community Schools Technical Assistance Center / CS-TAC (NYSED, Fordham University).** Serves as lead evaluator for CS-TAC. Helps Center staff assess the quality and usefulness of services provided to Community Schools in New York City and the eastern region of the state, supporting both external reporting and program improvement.
- **Mid-Atlantic technical assistance center (U.S. Department of Education).** Served as lead evaluator for a federally funded Mid-Atlantic technical assistance center. Gathered evidence on the Center's activities and success in helping clients design and implement effective policies and practices.

Implementation Support and Coaching: Leadership Development and Principal Pipelines

- **School Improvement Leadership Academy / SILA (University of Maryland, U.S. DOE SEED grant).** Member of the team evaluating SILA, which supports principal development through comprehensive, evidence-based professional learning to principals and assistant principals on school improvement and leadership. The impact evaluation comprises a quasi-experimental matched-comparison design.
- **Growing Great Leaders principal pipeline (Noyce Foundation, Baltimore City Public Schools).** Team member on the evaluation of Baltimore's principal leadership pipeline initiative, examining how the district and three partner organizations collaborate to design school- and role-based development opportunities for aspiring principals.
- **Baltimore principal accountability and support systems (Baltimore Community Foundation).** Led the evaluation combining surveys and interviews with key district stakeholders to develop grounded findings of the strengths and weaknesses in the operation and outcomes of Baltimore's principal accountability and support systems.

Educator Workforce Development

- **Educator pipeline in Pennsylvania (Region 4 CC).** Led the multi-year project with a Pennsylvania consortium to strengthen the educator pipeline in the Commonwealth and support effective instructional practices in K-12 schools and higher education.

College & Career Readiness

- **College Summit national evaluation (with AIR).** Co-led a multi-year evaluation of the implementation and outcomes of the College Summit program using a mixed design—a quasi-experimental comparative interrupted time-series analysis of mature programs and a randomized controlled trial of new programs—to assess impact on the development of a college-going culture and on preparation for and enrollment in post-secondary education.

- **Abell Foundation Performance-Based Scholarship initiative.** Led a quasi-experimental evaluation examining the comparative performance of Baltimore City Public Schools graduates who enrolled in local community colleges. Data collection included quantitative analyses of administrative data, two student surveys, and interviews with key program staff.
- **United Way Worldwide Middle and High School Success and Transitions Initiative.** Led the evaluation of UWW's education strategy in 12 communities, working with UWW and grantees to develop a theory of change, indicators and measures of program implementation and outcomes, and interview protocols and surveys.
- **BGCA Be Great 9th Grade Cohort, CareerLaunch, and Great Futures in Science (Boys & Girls Clubs of America).** Led multiple evaluations supporting BGCA's transition, career-planning, and STEM programs through site visits, surveys of mentors and participants, and analysis of administrative data, with reporting focused on identifying successes, challenges, and best practices.
- **Claude Moore Foundation health education program (with George Washington University).** Evaluated a Virginia school district's health education program, exploring the extent to which participants experienced different post-secondary outcomes compared with similar non-participants.

Funding & Resource Allocation

- **School Improvement Grant strategy profiles (U.S. Department of Education).** Member of the team developing profiles on schools, districts, and states that received School Improvement Grant funding, with each profile focused on a specific strategy used to improve student learning opportunities and outcomes.

Student Attendance & Engagement

- **Wheaton and Watkins Mill High School Knight Time (Montgomery County Public Schools, 21st CCLC).** Leads the evaluation of the Knight Time afterschool project, including evaluation focused on collaborating to remove barriers for newcomer students. Tracks achievement of milestone targets and develops understanding of successes and challenges of program implementation through interviews, online learning platform data, and engagement with school staff, project partners, and participants.
- **Baltimore Transformation Schools Initiative.** Led the evaluation comparing outcomes of students enrolled in Transformation Schools and non-Transformation Schools within and across school years, using district administrative data supplemented by interviews with school leaders and operators.
- **Colorado Closing the Achievement Gap Leading Together peer-mentoring dropout prevention.** Led the evaluation analyzing two years of data on students enrolled as tutors and mentors in four school districts to identify early impacts of the program.

Community Schools & Family Engagement

- **Children's Aid Society Parent Leadership Initiative (i3 development grant).** Led the evaluation documenting implementation of the initiative in six South Bronx schools. Activities included collection and analysis of implementation data, surveys and interviews of stakeholders, and exploratory quantitative analyses linking parent participation in sponsored activities to student engagement and academic performance.
- **Annie E. Casey Foundation Baltimore community high school expansion.** Led development of a research-based document to inform the expansion of community high schools in Baltimore City through a literature review and interviews with principals and partners of current community schools.
- **i3 READS for Summer Learning (Harvard University).** Led the formative evaluation across six regions of North Carolina, examining program component implementation through interviews with key staff, observation of program activities, and parent interviews.

Methodological Expertise

- **Mixed-methods evaluation design.** Design and management of evaluations integrating quantitative and qualitative methods, including comparative interrupted time-series, RCTs, and propensity-matched designs.
- **Stakeholder engagement & facilitation.** Interviews and focus groups with state and district leaders, providers, foundations, families, and students to ensure as many voices and experiences as possible inform policy and program recommendations.
- **Survey research.** Design, sampling, administration, and analysis of stakeholder, participant, and provider surveys.

- **Administrative & longitudinal data analysis.** Merging and analysis of district and state data systems, including development of early-warning indicators, longitudinal student tracking, and graduation-requirements tracking.
- **Theory of change & outcomes frameworks.** Development of theories of change, indicators, and measurement frameworks for foundation initiatives, school districts, and SEAs.
- **Literature and artifact review.** Review of extant literature and policy documents to inform state and local policy change.
- **Federal grant administration & reporting.** Oversight of federal Comprehensive Center operational and reporting requirements and state service and project plan implementation.

Employment History

Policy Studies Associates. Washington, DC — Managing Director	2010–Present
Baltimore City Public Schools. Baltimore, MD — Director of Research Services	2005–2010
Policy Studies Associates. Washington, DC — Senior Research Associate	1997–2005
Innovative Medical Research. Towson, MD — Research Study Coordinator	1994–1997

Education

University of Maryland, College Park — Ph.D., Education Policy and Research
University of Chicago — M.A., Sociology
Georgetown University — B.A., Sociology

Selected Reports and Publications

- Anderson, L.M., Woods, Y., & Hildreth, J. (2025). Evaluation of the SEED-Funded School Improvement Leadership Academy (SILA) at the University of Maryland's Center for Educational Innovation and Improvement (CEii): Final Report. Washington, DC: Policy Studies Associates.
- Hildreth, J. (2024). Collaborating to remove barriers for newcomer students: Evaluation of the afterschool programs at Wheaton and Watkins Mills High Schools. Washington, DC: Policy Studies Associates.
- Hildreth, J., Snow, K., & Cheever, H. (2022). MSDE stakeholder engagement analyses. Washington, DC: Policy Studies Associates.
- Hildreth, J. (2020). Building meaningful bridges for students: Supporting expansion of Baltimore community high school. Washington, DC: Policy Studies Associates.
- Hildreth, J., & Butler, A. (2019). Parents at the center: Final Parent Leadership Institute evaluation report. Washington, DC: Policy Studies Associates.
- Hildreth, J., Aladjem, D., Butler, A., & Turner, T. (2018). Supporting the development of effective systems of school improvement: Year 1 evaluation of DCF investments. Washington, DC: Policy Studies Associates.
- Thessin, R., Scully-Russ, E., Hildreth, J., & Lieberman, D. (2018). Key features to inform student outcomes: Learning from a high school healthcare education program. *International Journal of Education Reform*.
- Hildreth, J., Francis, Y., Orozco, N., Palmiter, A., Riley, D., & Turner, T. (2016). Preparing students for career and college: An evaluation of the early implementation of the College Summit program. Washington, DC: Policy Studies Associates.
- Hildreth, J., Butler, A., Francis, Y., McCann, C., & Palmiter, A. (2015). Helping students make successful high school transitions: Evaluation of the BGCA Be Great 9th Grade Cohort program. Washington, DC: Policy Studies Associates.
- Hildreth, J., Francis, Y., & Turner, T. (2015). Post-secondary preparation, access, and completion: A literature review. Washington, DC: Policy Studies Associates.
- Hildreth, J., Riley, D., Dibner, K., & Turnbull, B. (2014). Principal support and accountability in Baltimore City Public Schools. Washington, DC: Policy Studies Associates.
- Hildreth, J., Butler, A., Vaden, Y., & Coleman, S. (2014). Report on the Abell Foundation Performance-Based Scholarship Initiative. Washington, DC: Policy Studies Associates.

Hildreth, J., Palmiter, A., Vaden, Y., & Reisner, E. (2012). Evaluation of the Baltimore City Public Schools Transformation Schools Initiative. Washington, DC: Policy Studies Associates.

A complete list of publications and conference presentations is available upon request.

BRIAN K. EYER

Senior Associate for Policy and Practice | Policy Studies Associates, Inc.

Education leadership-development and technical assistance leader with more than 30 years of experience as a teacher, assistant principal, principal, principal supervisor, leadership development specialist, and state CTE budget manager. Senior Associate for Policy and Practice at Policy Studies Associates, Dr. Eyer delivers capacity-building technical assistance and customized leadership-development programs for state education agencies, local school districts, and national organizations, including sustained, direct support to the Region 4 (Mid-Atlantic) Comprehensive Center serving Delaware, the District of Columbia, Maryland, New Jersey, and Pennsylvania. His work helps states and districts design and implement evidence-based policies and practices across leader development and principal pipelines, the educator workforce, college and career readiness (including CTE and Perkins funding), mathematics curriculum and instruction, federal and state funding and resource allocation, and student engagement in rural and high-need schools. He has supported leadership-development work for Wichita Public Schools (Kansas) principal supervisors as part of PSA's Pipeline Center and leads evaluation for two Partners for Rural Impact Full-Service Community Schools regions across rural Kentucky. He grounds his technical assistance in adult learning theory, his lived experience as a principal supervisor and transformational principal, and a deep working knowledge of state policy implementation.

Areas of Expertise

- **Capacity-building technical assistance to SEAs and districts.** Direct support to state education agencies and districts on policy implementation, leader-academy development, and customized professional learning grounded in adult learning theory.
- **Leader development & principal pipelines.** Design and delivery of leadership academies for aspiring and sitting principals, assistant principals, principal supervisors, and superintendents; co-author of state professional-standards rubrics, principal evaluation guidance, and AP advancement tools.
- **Educator workforce development.** Tools, workbooks, and TA to help state and district teams strategize programmatic and workforce plans, including a multi-volume Pennsylvania resource on strengthening the educator workforce for Multilingual Learners.
- **College & career readiness (CTE).** Career pathways design, work-based learning, industry-standard assessments, and Perkins funding; state-level CTE budget management and program oversight.
- **Mathematics curriculum & instruction.** Implementation support and site-based evaluation of citywide Algebra I curriculum adoption (Illustrative Mathematics).
- **Federal & state funding and resource allocation.** Development of ESSER fund monitoring tools for state oversight of district spending; Perkins grant administration and state/federal CTE reporting; evaluation of rural federal grants.
- **Student engagement in rural & high-need schools.** Evaluation of full-service community school grants in rural Kentucky and direct leadership of school-turnaround work as a transformational principal in Baltimore.
- **State policy implementation.** Practitioner-grounded expertise in implementing landmark state policies, including The Blueprint for Maryland's Future.

Selected Project Experience

Building SEA and LEA Capacity Through Technical Assistance, Coaching, and Professional Learning

- **Region 4 (Mid-Atlantic) Comprehensive Center (U.S. Department of Education, 2020–2024).** Led and supported projects for the Region 4 Comprehensive Center serving Delaware, the District of Columbia, Maryland, New Jersey, and Pennsylvania, informing state and local policy change and developing leader academies and leadership pipelines. Supported MSDE on the development of ESSER fund tools for monitoring district spending. Analyzed survey and focus group data to inform Maryland's strategic plan for implementing The Blueprint for Maryland's Future. Developed an Aspiring Superintendents Academy with the Public School Superintendents

Academy of Maryland (PSSAM) and customized leadership-development programs with the Delaware Department of Education, Calvert County, Queen Anne's County, Christina School District (DE), Talbot County, and the Eastern Shore of Maryland Education Consortium.

- **Strengthening the Educator Workforce for Multilingual Learners (Pennsylvania Department of Education).** Led the development of *Strengthening the Educator Workforce for Multilingual Learners: A Tool for Educational Agencies, Workbooks 1, 2, and 3* (2023–2025). Developed resources to help district teams strategize their programmatic and workforce plans so that Multilingual Learners receive needed support. Piloted the tool in the Palisades School District (PA) and shared resources at the U.S. Department of Education's ESSA Conference and the national conference of the Massachusetts Association of Teachers of Speakers of Other Languages (MATSOL). This tool has led to significant changes in the Palisades school district, including improved teacher preparation and improved multilingual learner outcomes on state assessments.

Implementation Support and Coaching: Leadership Development and Principal Pipelines

- **The Pipeline Center (Policy Studies Associates).** Supports the development of PSA's Pipeline Center, a full-service technical assistance center designed to build the leadership capacity of district and state education systems to develop, implement, and sustain a pipeline of high-quality education leaders. Delivered training with Wichita Public Schools (Kansas) principal supervisors on developing assistant principals; developed the Pipeline Center facilitator certification process for future facilitators. Led the pipeline development project in Talbot County Public Schools, resulting in a professional development and training initiative for central office staff, school board members, principal supervisors, principals, and assistant principals.
- **AP Summit & Career Lattice (DCPS and OSSE, Wallace Foundation principal-pipeline initiative).** Served as a team member to develop the *AP Summit*, a city-wide professional development initiative for assistant principals launched by DCPS and OSSE with funding from the Wallace Foundation's principal-pipeline initiative. Supported the development of DCPS's Career Lattice Program for teacher leaders by researching best practices and aligning the program to district goals.
- **Maryland leader academies and consortia (Region 4 Comprehensive Center).** Collaboratively customized leadership-development programs for principals, aspiring principals, teacher leaders, assistant principals, principal supervisors, district office staff, and the Eastern Shore of Maryland Education Consortium across multiple Maryland districts and consortia.
- **Maryland State Leadership Development (MSDE, 2017–2019).** As MSDE Leadership Development Specialist, co-authored the *Professional Standards for Educational Leaders Rubric*, the *Principal Evaluation Guidebook*, the *Leadership Coaching Guide*, and four webinars for local school systems. Developed and delivered professional learning experiences for principals, assistant principals, principal supervisors, assistant superintendents, IHE partners, coaches, teacher leaders, and teachers. Established the Promising Principals' Academy (PPA) to fill gaps between principal preparation and practice, and the Leading for School Improvement Institute (LSII) for principal teams in Maryland's lowest-performing schools (Comprehensive Support and Improvement and Targeted Support schools). Coached six principals in low-performing schools in Dorchester County and Prince George's County.
- **Assistant Principal Advancement to the Principalship (The Wallace Foundation).** Co-author of *Assistant Principal Advancement to the Principalship: A Guide for School Districts*, commissioned by The Wallace Foundation.

College & Career Readiness

- **Maryland CTE budget management & Perkins grant administration (MSDE).** Served as budget manager for the CTE programs of the state of Maryland, with deep working knowledge of Perkins grant regulations and data requirements for both state and federal reporting.
- **Digital Harbor High School CTE pathways (Baltimore City Public Schools, principal 2005–2015).** As principal of a 1,500+ student CTE high school, designed and implemented career pathways aligned to MSDE guidelines that prepared all students to graduate college- and career-ready. Addressed funding challenges and ensured students received essential program components including work-based learning experiences, job shadowing, and industry-standard assessments to achieve program completion. Grew advanced placement classes from 0 to 8, created honors-level classes, and developed two new technology-focused CTE career pathways.
- **NYC Public Schools Pathways Initiative.** Serves as a team member on the evaluation of the NYCPS Pathways initiative. Co-designed interview and focus group protocols, conducted site visits to understand program

implementation, and supported the development of case studies of five schools implementing programs under the Pathways Initiative.

Mathematics Curriculum & Instruction

- **NYC Solves — Algebra I implementation (NYC Public Schools).** Served as a team member on the NYCPS Math Initiative. Developed protocols, conducted site visits, and reported on school successes and challenges in implementing Illustrative Mathematics, the new Algebra I curriculum NYCPS had adopted.

Federal & State Funding and Resource Allocation

- **ESSER fund monitoring tools (MSDE, Region 4 Comprehensive Center).** Supported the Maryland State Department of Education in developing ESSER fund tools for monitoring district spending.
- **Perkins grant administration & state CTE budget management (MSDE).** Served as state budget manager for Maryland CTE programs, with direct responsibility for Perkins grant regulations, data requirements, and state and federal reporting.
- **Partners for Rural Impact Full-Service Community Schools / FSCS (U.S. Department of Education).** Leads evaluation for two regions in Kentucky that received FSCS grants, supporting measurement and reporting on grant objectives, pillars, and federal performance indicators; delivering formative evaluation feedback to grant leaders and school-based teams; and generating field-building insights related to implementing, scaling, and sustaining FSCS in rural communities.

Student Engagement & School Improvement

- **Digital Harbor High School transformation (Baltimore, principal 2005–2015).** As Transformational Principal, led Digital Harbor's growth from 850 to 1,500 students. Provided leadership in instructional leadership, staff development, evaluation, data analysis, operations, finance, and action research. Managed a staff of 152. Developed a learning-community structure that collected and analyzed student data, strategically implemented student interventions, and continually developed leadership and teacher capacity through customized professional learning.
- **Baltimore Community Learning Network principal supervisor (Baltimore City Public Schools, 2015–2017).** As Executive Director / Principal Supervisor, supported 14 Baltimore schools and Special Education Centers with focus on building leadership capacity. Coordinated monthly Community Learning Network meetings with principals to build administrator capacity in instructional leadership teams, teacher leader development, and data triangulation (i-Ready, MAPs, common assessment, state data) for focused classroom instruction. Conducted monthly cross-functional walk-throughs with content specialists and provided actionable feedback to principals and leadership teams.

Methodological Expertise

- **Adult learning principles & professional learning design.** Design and delivery of customized professional learning experiences grounded in adult learning principles for leaders at all levels.
- **Survey & focus group research.** Design, implementation, and analysis of surveys and focus groups to inform state strategic planning, leader-academy improvement, and TA design.
- **Tool and workbook development.** Development of standards rubrics, evaluation guidebooks, coaching guides, ESSER monitoring tools, and multi-volume district resources.
- **Instructional walk-throughs & coaching.** Leadership-team walk-throughs with actionable feedback cycles; one-on-one coaching of principals in low-performing schools.
- **State policy implementation analysis.** Analysis of state policy implementation, including The Blueprint for Maryland's Future.
- **Improvement Science.** Design and facilitation of Plan-Do-Study-Act cycles and rapid-cycle tests to iterate interventions and accelerate local improvements.

Employment History

Policy Studies Associates. Washington, DC — Senior Associate for Policy and Practice	2020–Present
Maryland State Department of Education. Baltimore, MD	
Leadership Development Specialist	2017–2019
Baltimore City Public Schools. Baltimore, MD — Executive Director (Principal Supervisor)	2015–2017
Digital Harbor High School (Baltimore City Public Schools). Baltimore, MD	
Transformational Principal	2005–2015
Central Bucks School District. Doylestown, PA — Assistant Principal	2000–2005
Harrisburg School District. Harrisburg, PA — Teacher and Assistant Principal	1992–2000

Education

University of Phoenix — Ed.D., Educational Leadership
Cleveland State University — M.Ed., Curriculum and Development
Penn State University — Principal Certification
York College of Pennsylvania — B.S., Biology

Selected Reports and Publications

Miller, K.F., Platt, A.L., Eyer, B.K., & Russell, C.A. (2025). Evaluation of FutureReady NYC: Lessons Learned from Five Schools. Washington, DC: Policy Studies Associates.

Booker-Dwyer, T., Aladjem, D., Fletcher, K., & Eyer, B. (2023). Assistant principal advancement to the principalship: A guide for school districts. Washington, DC: Policy Studies Associates, commissioned by The Wallace Foundation.

Eyer, B.K. (2023–2025). Strengthening the educator workforce for Multilingual Learners: A tool for educational agencies, Workbooks 1, 2, and 3. Pennsylvania Department of Education.

Fletcher, K.B., Eyer, B.K., & Russell, C.A. (2022). A district vision for equity: Strategies from Surrey Schools. Surrey, Canada. Maryland State Department of Education. (2019). Equity and excellence: A guide to equity in Maryland. (Co-author.)

Maryland State Department of Education. (2019). Maryland's professional standards for educational leaders rubric. (Co-author.)

Maryland State Department of Education. (2019). Principal evaluation guidebook. (Co-author.)

Eyer, B.K. (2014). Correlation study between new teacher retention and professional learning community culture in urban high schools. Dissertations & Theses @ University of Phoenix.

A complete list of publications and conference presentations is available upon request.

DANIEL K. ALADJEM

Managing Director | Policy Studies Associates, Inc.

Dan Aladjem is a researcher, evaluator, policy analyst, and Managing Director at Policy Studies Associates with more than 25 years of experience designing and leading studies across the full spectrum of education research and policy. A unifying thread runs through that work: real improvement in classrooms requires changing individual behavior within schools, and changing schools requires understanding and addressing the institutional forces at the district, state, and federal levels that shape what is possible. That conviction has guided work across school and system improvement, educator pipeline development, instructional practice and change, and direct technical assistance to public agencies. He brings that analytical orientation to sustained work with state and local education agencies — including DC's Office of the State Superintendent of Education and the Maryland Accountability and Implementation Board — alongside a broad portfolio of federal, foundation, and nonprofit clients. His work on educator pipelines spans both ends of the continuum, from teacher leadership development to principal preparation and the systems that support both, grounded in genuine depth in how those systems change and what strategic staffing of schools actually requires. He chairs PSA's Institutional Review Board.

Areas of Expertise

- **Capacity-building technical assistance to SEAs and education agencies.** Direct support to state education agencies (including OSSE-DC) and national organizations on policy implementation, system alignment, and the design of agency supports to lowest-performing schools.
- **Educator workforce & teacher pipeline development.** Evaluation of teacher residency programs, multi-state State Teacher Fellows initiatives, district educator staffing and hiring, and STEM teacher leadership models.
- **Leader development & principal pipelines.** Studies of and tools for principal preparation programs, assistant principal advancement, and district readiness to build, expand, and sustain leadership pipelines—including Wallace Foundation pipeline initiatives reaching 90+ districts.
- **STEM curriculum, instruction & policy.** Commissioned work for the National Academies on K-12 STEM and rural workforce development, NGSS standards-setting, longitudinal evaluation of system-wide mathematics and science curriculum and instruction initiatives, studies of deeper learning and its implications for teacher evaluation systems, and reviews of innovative science investigations and engineering design for grades 6-12.
- **Literacy curriculum & the science of reading.** Co-author of national resource guiding state chiefs to align curricula, assessments, and professional learning to evidence-based reading instruction, Reading First state monitoring team member.
- **College & career readiness.** Outcome evaluation of postsecondary access programs and research on instructional practices and student attributes associated with college and career success.
- **School improvement & turnaround.** National studies of comprehensive school reform, dramatically improved schools, and federal Turnaround School Leaders Program; senior advising on full-service community schools in rural communities; studies of school choice and alternative education contexts.
- **Funding & resource allocation.** Analysis of federal education and workforce-development investments in rural areas; evaluation of foundation grant programs and the targeting of grant resources.

Selected Project Experience

Building SEA and LEA Capacity Through Technical Assistance, Coaching, and Professional Learning

- **D.C. Office of School Support plan (OSSE).** Provided technical support to the District of Columbia Office of the State Superintendent of Education in responding to a D.C. Council mandate to develop a plan for a new Office of School Support to intensify OSSE's support to the lowest-performing schools in D.C. Led meetings with the OSSE Deputy Superintendent; managed day-to-day project activities; designed and supervised research, landscape scanning, and policy analysis; led all project deliverables including reports, briefs, and presentations; and co-facilitated listening sessions with school principals and CBO executives.

- **School climate and culture alignment (OSSE).** Provided technical support to OSSE to align supports for positive school climate and culture work across OSSE divisions; guided scope and sequence for the project, facilitated working group sessions to collect, analyze, and streamline relevant work across the agency; produced a theory of action and logic model reflecting OSSE's school climate and culture priorities; and developed recommendations for improvement of related work streams.
- **NGA Center for Best Practices Policy Academy evaluation.** Principal Investigator for an evaluation of the NGA Center for Best Practices' signature technical assistance program. The study described the TA provided to four states and their work to improve statewide educator evaluation systems. Findings were used by NGA to improve TA activities.
- **ESSA Leadership Learning Community (ELLC).** Studied a foundation and partner-initiated effort to foster cross-sectoral state-level and statewide education policy making and implementation related to school turnaround, school leadership, and ESSA. ELLC engaged 11 state-based teams of state officials, local district leaders, community members, and universities in strengthening school leadership and school improvement.

Educator Workforce & Teacher Pipeline Development

- **Hope Street Group State Teacher Fellows programs (4 states).** Led a six-year formative study of the Hope Street Group State Teacher Fellows programs in Hawai'i, Kentucky, North Carolina, and Tennessee. The study integrated interview, focus group, survey, and social media data to document program impacts and produce recommendations for program improvement.
- **STEM Teacher Leadership Research Action Cluster (U.S. Department of Education).** Facilitated a Research Action Cluster on models of STEM teacher leadership for the U.S. Department of Education.
- **Detroit Children's Fund K-12 School and Talent Program Grants.** Senior member of the study team that examined DCF's investment in school and teacher leaders as a strategy for improving schools, providing formative and summative feedback to DCF on implementation and outcomes.

Implementation Support and Coaching: Leadership Development and Principal Pipelines

- **Improving principal preparation programs in Texas.** Principal Investigator for a study of improving principal preparation programs in Texas, focused on the role of external technical assistance, change in higher education, and the state education agency's role in improving principal preparation. EDC, with support from the Texas Education Agency, provided external assistance through professional learning and networking strategies connected to the Quality Measures tool, reaching approximately half of all principal preparation programs in Texas.
- **Albany State University Tier II principal preparation redesign (UPPI).** Principal Investigator on the evaluation of an innovative Tier II principal training program. Led design of a case study highlighting the redesign of the principal preparation program. Directed design, data collection, and analysis of a qualitative study of the impact of the UPPI initiative; co-authored *Redesigning Principal Preparation: A Case Study of the ASU Educational Leadership Tier II Program* for the International Council of Professors of Educational Leadership.
- **Principal Pipeline Initiative & district readiness tools (The Wallace Foundation).** Senior member of the study team that evaluated the implementation and effectiveness of the principal pipelines initiative. Led examination of the experiences of assistant principals in the leadership pipeline. Subsequently led development of tools and procedures for facilitated assessment of school district readiness to expand leadership pipelines in support of Wallace's nationwide scale-up of pipelines in over 90 districts.
- **Federal Turnaround School Leaders Program / TSLP (U.S. Department of Education).** Led a study of the implementation and early outcomes of the TSLP, which funded partnerships between school districts and universities and nonprofits to build pipelines of school and teacher leaders. The study illustrated the ways districts and principal preparation programs partnered to train leaders for turnaround schools.
- **Assistant principal advancement and pipeline consultant certification.** Provided intellectual guidance to projects developing tools and procedures for improving school districts' assistant principals' readiness for promotion as well as for certifying trained external consultants working with school districts on principal pipelines.

STEM Curriculum, Instruction & Policy

- **K-12 STEM education and workforce development in rural areas (National Academies of Sciences, Engineering, and Medicine).** Authored a commissioned paper describing the quantity and evaluating the quality of current federal programming and research directed at K-12 STEM education (in both formal and informal settings) and workforce development in rural areas.
- **Science and Engineering for Grades 6-12 (National Academy of Sciences).** Led a review of the research literature on engaging middle and high school students in science and engineering through new approaches to investigation and design. The work provided the basis for the committee's review of research on science investigations and engineering design problems for grades 6-12, contributing to the 2019 report *Science and Engineering for Grades 6-12: Investigation and Design at the Center*.
- **D.C. Science Assessment standards setting (OSSE).** Provided technical support to OSSE on the standards-setting process of the District of Columbia Science Assessment, D.C.'s Next Generation Science Standards-based assessment, and coordinated OSSE's Technical Advisory Group.

Subject-Matter Expertise: Literacy and the Science of Reading

- **A Nation of Readers (Council of Chief State School Officers).** Co-authored a national resource guiding state chiefs, IHEs, and other stakeholders to align curricula, assessments, and professional learning to the science of reading. The guide has informed state reading policy nationwide since its 2021 release.

College & Career Readiness

- **UC Early Academic Outreach Program / EAOP (University of California Office of the President).** Principal Investigator for the outcome evaluation of UC's premier youth engagement and partnership program, which builds partnerships between UC campuses and local schools to promote readiness and enrollment in UC, CSU, and other higher education institutions. The evaluation combined qualitative description across all campuses with extant administrative data to examine EAOP student outcomes relative to other students.
- **Instructional practices on the OECD Test for Schools (America Achieves and Asia Society).** Led a study of instructional practices in high schools that participate in the OECD Test for Schools and PISA, with emphasis on practices that engage high school students in ways that lead to higher performance.
- **Attributes of post-high school student success (America Achieves).** Conducted a systematic review of the research literature and associated metrics on attributes of student success post-high school.

School Improvement & Turnaround

- **National Longitudinal Evaluation of Comprehensive School Reform (IES).** Project Director responsible for designing and directing all aspects of the federal government's single largest research investment in studying the implementation and impact of comprehensive school reform. Findings documented the conditions under which whole-school reform models produced measurable improvements in student outcomes.
- **GE Foundation Developing Futures evaluation.** Principal Investigator for a four-year, multi-million-dollar evaluation of the GE Foundation's system-wide initiative to improve mathematics and science curricula and instruction across multiple urban districts — an early and large-scale test of what systemic instructional change requires, conducted before Next Generation Science Standards existed and before the Common Core reframed expectations for rigor. Findings centered on the organizational conditions that enabled or impeded instructional change at the classroom, school, and district levels.
- **Achieving Dramatic School Improvement (U.S. Department of Education).** Project Director for a three-year project to identify schools that achieved rapid improvements in student outcomes and to analyze the policies, programs, and practices used by these turnaround schools compared with strategies used by nonimproving chronically low-performing schools.
- **Full-service community schools in rural Kentucky.** Senior Advisor on evaluations of the implementation of full-service community schools across seven federal grants in rural communities of three states; guides reporting, analysis, and qualitative data collection.

Funding & Resource Allocation

- **Federal education and workforce-development investments in rural areas (National Academies).** Authored *Strategic Priorities or Distributed Choice? Federal Education and Workforce Development Investments in Rural Areas*, a commissioned chapter examining federal targeting and allocation strategies in rural communities.
- **National Academy of Education grant program bias analysis.** Directed an analysis of two NAEd grant programs for early-career scholars, identifying areas of bias in grant awards (more strongly related to applicants' institutional reputation than other factors).

Methodological Expertise

- **Quasi-experimental & longitudinal designs.** Matched-comparison and longitudinal evaluations of teacher residencies, school turnaround, and comprehensive school reform using student-level and administrative data.
- **National qualitative & case study research.** In-depth retrospective case studies, multi-site implementation studies, and case study design for principal preparation redesign and turnaround school strategies.
- **Mixed-methods program evaluation.** Integration of interview, focus group, survey, social media, and administrative data for multi-year formative evaluations.
- **Literature reviews & evidence syntheses.** Commissioned reviews for the National Academies and other sponsors on STEM, deeper learning, and post-high-school student success.
- **Research design & methods alignment.** Matching analytic methods to inquiry focus, including quantitative analysis of achievement and outcomes data and qualitative analysis of policy implementation.
- **Tool and toolkit development.** Facilitated assessment tools, theories of action, logic models, and practitioner resources for districts, SEAs, and national organizations.

Employment History

Policy Studies Associates. Washington, DC — Managing Director	2013–Present
SRI International. Arlington, VA — Senior Researcher	2011–2013
American Institutes for Research. Washington, DC — Principal Research Scientist	1998–2011

Education

University of Southern California — Ph.D., Public Policy / Public Administration	1998
Stanford University — A.M., Education, Secondary Teaching	1991
Stanford University — A.B., History (Departmental Honors)	1987

Selected Advisory Roles

Center on School Turnaround, WestEd. Scientific Council (2012–2018) and Advisory Board (2014–2018)	
TA Academy Advisory Board, Education Northwest	2013–2015
General Electric Foundation Advisory Board	2005–2009

Selected Reports and Publications

- Aladjem, D.K. (2024). Strategic priorities or distributed choice? Federal education and workforce development investments in rural areas. In National Academies of Sciences, Engineering, and Medicine, K-12 STEM education and workforce development in rural areas (pp. 261–275). Washington, D.C.: National Academies Press.
- Booker-Dwyer, T., Aladjem, D.K., Fletcher, K., & Eyer, B. (2023). Assistant principal advancement: A guide for school districts. Washington, D.C.: Policy Studies Associates.
- Carthon, J.E., Aladjem, D.K., Daniels, D.V., & Fletcher, K. (2022). Redesigning principal preparation: A case study of the ASU educational leadership Tier II program. ICPEL Education Leadership Review, 23(1), 286–304.
- Turnbull, B.J., Aladjem, D.K., Fletcher, K., & Kidd, S. (2022). All the voices: Statewide collaborations for school leadership. Washington, D.C.: Policy Studies Associates.

- Aladjem, D.K., Meredith, J.M., & Kidd, S. (2021). Evaluation of the NYC Fatherhood Program. Washington, DC: Policy Studies Associates.
- Aladjem, D.K., Anderson, L.M., Riley, D.L., & Turnbull, B.J. (2021). Principal pipeline self-study guide for districts. New York: The Wallace Foundation.
- Anderson, L.M., Aladjem, D.K., Fletcher, K., & Riley, D.L. (2021). A nation of readers: How state chiefs can help every child learn to read. Washington, DC: Council of Chief State School Officers.
- Aladjem, D.K., Anderson, L.M., et al. (2020). Advancing school leadership, improvement, and equity in ten states. Washington, DC: Policy Studies Associates.
- Turnbull, B.J., & Aladjem, D.K. (2020). Analysis of district definitions of educational equity: Equity-centered Principal Pipeline Exploratory Test. Washington, DC: Policy Studies Associates.
- Aladjem, D.K., von Glatz, A., Hildreth, J., & McKithen, C. (2018). Leading low-performing schools: Lessons from the Turnaround School Leaders program. Washington, DC: U.S. Department of Education.
- Turnbull, B.J., Anderson, L.M., Riley, D.L., MacFarlane, J.R., & Aladjem, D.K. (2017). Building a stronger principalship, Vol. 5: The Principal Pipeline Initiative in action. Washington, DC: Policy Studies Associates.
- MacFarlane, J.R., Aladjem, D.K., & Russell, C.A. (2017). Instructional practices in high schools that participate in the OECD Test for Schools and PISA. Washington, DC: Policy Studies Associates.
- Aladjem, D.K. (2016, September). The future of low-performing schools. *The State Education Standard; The Journal of the National Association of State Boards of Education*, 32–34.
- Aladjem, D.K. (2014). Evaluating the state turnaround strategy. In S. Redding & L.M. Rhim (Eds.), *Handbook on state management of school turnaround*. Sacramento: Center on School Turnaround WestEd.
- Aladjem, D.K., Birman, B., Harr-Robins, J., Orland, M., Heredia, A., Parrish, T.B., & Ruffini, S. (2010). Achieving dramatic school improvement: An exploratory study. Washington, DC: U.S. Department of Education.
- Aladjem, D.K., & Borman, K.M. (Eds.). (2006). *Examining comprehensive school reform*. Washington, DC: Urban Institute Press.
- Aladjem, D.K., LeFloch, K.C., Herman, R., Zhang, Y., et al. (2006). *Models matter — The final report of the National Longitudinal Evaluation of Comprehensive School Reform*. Washington, DC: American Institutes for Research.
- A complete list of publications and conference presentations is available upon request.*

LESLIE M. ANDERSON

Co-Owner & Principal | Policy Studies Associates, Inc.

Education research and technical assistance leader with more than three decades of experience directing a diverse portfolio of evaluation, capacity-building, and policy studies for state education agencies, the U.S. Department of Education, foundations, and national organizations. Co-Owner & Principal of Policy Studies Associates, she also leads PSA's Center for Leadership Improvement and Pipeline Support (The Pipeline Center), which builds the capacity of state and district systems to develop and sustain pipelines for principals, superintendents, and other leaders. Deep expertise spanning the educator workforce pipeline, school and district leadership development, literacy and the science of reading, mathematics curriculum and instruction, college and career readiness, student attendance and engagement, and federal funding and resource allocation. Specializes in mixed-methods study design, capacity-building technical assistance grounded in evidence-based policy and practice, and translating complex findings into concise, actionable tools and briefs for technical, policy, and practitioner audiences. Known for building and sustaining trusted client relationships across multiple cycles of research, evaluation, and technical assistance.

Areas of Expertise

- **Educator workforce & teacher pipeline development.** Landscape analyses of educator preparation and staffing shortages, teacher residency models, teacher quality and evaluation systems, and strategies to accelerate the supply and development of effective teachers in high-need settings.
- **Leader development & principal pipelines.** Principal and assistant principal professional learning, leader tracking systems, and tools for assessing district readiness to build, expand, and sustain leadership pipelines.
- **Literacy curriculum & the science of reading.** State and national initiatives to align curricula, assessments, and professional learning to evidence-based reading instruction, from early literacy through the elementary grades.
- **Mathematics & STEM curriculum and instruction.** Standards rollout and instructional materials supports, and evaluation of initiatives targeting access to STEM instruction and gains in mathematics achievement.
- **College & career readiness.** Dual enrollment implementation, individualized student learning opportunities, and postsecondary transition and standards alignment.
- **Student attendance & engagement.** Evaluation of school-based models measuring chronic absenteeism, attendance, graduation, and school-climate outcomes.
- **Federal funding & resource allocation.** Braiding and maximizing federal and state funds, resource-targeting analyses, and supports that help states and districts direct resources to highest-need communities.
- **Capacity-building technical assistance.** Needs sensing, service planning, coaching, and facilitation grounded in adult learning principles and implementation science that build SEA and LEA capacity to design, implement, and sustain evidence-based policies and practices.

Selected Project Experience

Building SEA and LEA Capacity Through Technical Assistance, Coaching, and Professional Learning

- **Region 4 (Mid-Atlantic) Comprehensive Center (U.S. DOE).** Co-led initiatives building NJDOE capacity through needs sensing, service planning, coaching, and technical assistance—identifying improvement priorities, leveraging existing resources and partnerships, and coordinating with partners to avoid duplicative efforts—to design, implement, and sustain evidence-based policies and practices spanning staffing shortages, needs-assessment systems, funding, preK-3 programming, dual enrollment, and standards rollout.
- **Comprehensive needs-assessment system (NJDOE).** Helped the state coordinate and streamline needs assessment by mapping requirements across 16 separate offices and programs and convening a cross-agency working group to simplify and align efforts so LEAs could better identify and address student needs.
- **Wisconsin school boards and superintendents (REL Midwest).** Directed in-person trainings and a webinar for local school board members and district superintendents on policies and practices to close achievement gaps and ensure universal access to high-quality education.

Educator Workforce & Teacher Pipeline Development

- **Statewide teacher shortages (NJ Department of Education, Region 4 Comprehensive Center).** Conducted a landscape analysis of district policies and practices to address staffing shortages, plus interviews with educator preparation program (EPP) and community college leaders on enrollment challenges and strategies to expand the pool of prospective teachers in high-need areas. Recommendations focused on stronger alignment between community colleges and four-year EPPs to support student transfers; NJDOE drew on these recommendations in its EPP and pipeline work.
- **Project edPIRATE teacher residency (East Carolina University, U.S. DOE Teacher Quality Partnership).** Directed the external evaluation of a teacher- and leader-preparation initiative for high-need rural schools featuring a one-year residency with stipends, hybrid graduate coursework, extended post-graduation support, and a complementary leadership program. Used administrative data, surveys, and focus groups to document candidate engagement and outcomes and to track changes in teacher and leader practices and retention in rural partner districts.
- **Teacher residencies as a shortage strategy (Michigan DOE, REL Midwest).** Conducted a landscape study of teacher residency programs and delivered two stakeholder trainings introducing research-based residency models and funding strategies, and facilitated discussion on how EPPs and districts could collaborate to launch residencies in Michigan.
- **Study of Emerging Teacher Evaluation Systems (U.S. DOE).** Directed a study describing the design and implementation of comprehensive teacher evaluation systems across eight districts—four fully operational and four in early implementation—to aid state and local planning.
- **National Study of the Teaching Profession (Center on Education Policy & Bill & Melinda Gates Foundation).** Directed a study surveying a nationally representative sample of more than 100,000 teachers to amplify educator voice on standards, testing, evaluation, and the profession.

Implementation Support and Coaching: Leadership Development and Principal Pipelines

- **The Pipeline Center (Center for Leadership Improvement and Pipeline Support, PSA).** Leads PSA's center dedicated to building the capacity of state and district systems to reimagine, develop, implement, and sustain the pipeline of principals, superintendents, and other school and district leaders. The Center delivers coaching and facilitated, evidence-based technical assistance—grounded in adult learning principles—to SEAs, regional service agencies, and districts in urban, suburban, and rural settings, drawing on a suite of pipeline tools developed from PSA's long-term, Wallace Foundation-funded research.
- **School Improvement Leadership Academy / SILA (University of Maryland, SEED grant).** Directs the external evaluation of a principal-development initiative providing evidence-based professional learning to 53 principals and assistant principals in Title I, Targeted Support and Improvement, and high-need schools, using a quasi-experimental matched-comparison design. As part of this work, led the scoring of 54 school improvement plans (SIPs) across two cohorts of leaders of high-need, predominantly Title I schools in Maryland and one New Jersey district against the University of Virginia/WestEd 12-domain Rubric for Assessing Schools' Plans for Rapid Improvement, using a calibrated eight-person scoring team with measured interrater reliability and consensus scoring on every plan, and generated a structured, evidence-cited scoring report identifying domain-level strengths and weaknesses for each plan. The structured feedback informed participants' plan revisions and the academy's curriculum redesign; among the 34 participants who completed the program and had matched pre- and post-academy plans, average SIP quality scores rose 4.5 points (Cohort 1) and 12.7 points (Cohort 2) out of 48 within a single year, with the largest gains in the planning domains that had scored weakest at baseline.
- **Principal Pipeline Initiative & district tools (The Wallace Foundation).** Senior member of the team evaluating how six large urban and suburban districts strengthened pipelines to prepare and support principals. Led development of the *Principal Pipeline Sustainability Guide* and contributed to the *Principal Pipeline Self-Study Guide for Districts*—tools now used in The Pipeline Center's facilitated assistance; lead author of reports on districts' systems for evaluating and supporting school leadership and on Leader Tracking Systems.
- **Project I4 — instructional leadership (East Carolina University, SEED grant).** Directed the external evaluation, applying implementation science to examine fidelity of implementation, improvement in principal performance as instructional leaders, changes in school culture and access to STEM instruction, and effects on mathematics achievement across approximately 50 low-performing Title I schools.

Literacy Curriculum & the Science of Reading

- **A Nation of Readers (Council of Chief State School Officers).** Led development of a national resource guiding state chiefs, IHEs, and other stakeholders to align curricula, assessments, and professional learning to the science of reading. Growing out of a 2020 CCSSO summit, the guide has informed state reading policy nationwide.
- **Reading Partners literacy tutoring (AmeriCorps grantee).** Directed an alumni outcomes study examining the service experience and effects on 1,000+ AmeriCorps alumni, comparing outcomes to a statistically matched national comparison group.
- **Jumpstart dual language learners (AmeriCorps).** Principal investigator for a study using multi-level modeling to assess the impact of college-student literacy tutoring on dual language learners' early literacy skills at sites in Los Angeles and San Francisco.
- **City Year high-impact tutoring — literacy outcomes (AmeriCorps).** Principal investigator for evaluations of the Whole School Whole Child model, which examined how high-impact tutoring delivered by AmeriCorps members affected student outcomes in English language arts. Used a comparison-group design and regression analyses across hundreds of partner schools to assess effects on literacy performance.

Mathematics & STEM Curriculum and Instruction

- **2023 ELA and mathematics standards rollout (NJDOE, Region 4 Comprehensive Center).** Supported the state's standards rollout by developing practical resources and tools—change summaries, crosswalks, learning modules, implementation plans, and instructional-materials tools.
- **Project i4 mathematics achievement (East Carolina University).** Led a quasi-experimental matched-comparison design using state assessment data to analyze changes in mathematics achievement and access to STEM instruction in Title I schools.
- **City Year high-impact tutoring — mathematics outcomes (AmeriCorps).** Principal investigator for evaluations of the Whole School Whole Child model assessing how high-impact tutoring delivered by AmeriCorps members affected student outcomes in mathematics. Used a comparison-group design and regression analyses across hundreds of partner schools to assess effects on math performance.

College & Career Readiness

- **Dual enrollment implementation toolkit (NJDOE, Region 4 Comprehensive Center).** Developed a toolkit to support districts in designing and implementing dual enrollment programs that expand early postsecondary opportunities.
- **Individualized Student Learning Opportunities / ISLO (NJDOE).** Evaluated the ISLO program, identified policy successes and challenges from administrative data and district interviews, and developed support materials including a policy decision checklist and a standards mapping tool for ISLO courses and experiences.
- **Quality in Undergraduate Education / QUE (The Education Trust).** Directed an evaluation of an effort to establish discipline-based postsecondary learning standards across ten four-year institutions and their feeder two-year colleges, including policies on credit accrual, transfer, and graduation.

Student Attendance & Engagement

- **City Year Whole School Whole Child model (AmeriCorps).** Principal investigator for evaluations of the WSWC model across 325 schools in 29 cities, using a comparison-group design and regression analyses to assess impact on academic achievement, chronic absenteeism, and graduation rates—extending prior studies and incorporating interviews and focus groups with leaders and AmeriCorps members.
- **DC Healthy Schools Act (Office of the State Superintendent of Education).** Co-directed an evaluation assessing implementation of health practices and policies and changes in student-level outcomes—including academic performance and attendance—at multiple points after implementation.

Federal Funding & Resource Allocation

- **Maximizing Federal Funds (NJDOE, Region 4 Comprehensive Center).** Helped districts braid federal and state resources to support accelerated learning through the design and development of the Maximizing Federal Funds website, and provided scenario-planning trainings and online resources to state and district staff.

- **Study of Education Resources and Federal Funding (U.S. DOE, with AIR).** Led the team analyzing how ESEA shaped targeting and resource allocation across major programs—examining how funds supported professional development, technology, extended learning time, and schoolwide reform, and how use varied across schools and districts.
- **21st Century Community Learning Centers state competitions (U.S. DOE, with AIR).** Directed an evaluation of states' capacity to administer grant competitions and developed a method linking U.S. Census data to state funding allocations to assess whether funds reached the highest-need, lowest-resourced communities.

Methodological Expertise

- **Quasi-experimental & comparison-group designs.** Matched-comparison and longitudinal designs using state assessment and administrative data to estimate program impact.
- **Advanced quantitative analysis.** Multi-level / hierarchical linear modeling, regression and joint-regression analysis, and analysis of student-level achievement data.
- **Survey research.** Nationally representative sample design, instrument development, administration, and follow-up—including surveys of 100,000+ teachers and national district samples.
- **Qualitative & mixed methods.** Case study design, site visits, interviews, and focus groups, integrated with quantitative findings to assess implementation and impact.
- **Translation & dissemination.** Concise briefs, reports, and toolkits with data visualizations tailored to technical, policy, and practitioner audiences.

Employment History

Policy Studies Associates. Washington, DC — Co-Owner & Principal	2010–Present
Potomac Business Consulting. McLean, VA — Managing Director	2009–2010
Independent Consultant (SRI International). Menlo Park, CA	2007–2009
Policy Studies Associates. Washington, DC — Managing Director	1990–2006
U.S. Department of Education. OERI, Washington, DC — Policy Analyst	Summer 1989
National Opinion Research Center (NORC). Chicago, IL — Research Assistant, Education Division	1988–1990
Decision Resources Corporation. Washington, DC — Assistant Research Analyst	1986–1988

Education

University of Chicago, Harris Graduate School of Public Policy Studies — M.P.P. (Program Fellowship Recipient)
Oberlin College — B.A., History

Selected Reports and Publications

- Anderson, L.M., Woods, Y., & Hildreth, J. (2025). Evaluation of the SEED-Funded School Improvement Leadership Academy (SILA) at the University of Maryland's Center for Educational Innovation and Improvement (CEii): Final Report. Washington, DC: Policy Studies Associates.
- Anderson, L.M., & Meredith, J. (2025). City Year effects on partner school outcomes from 2021-22 to 2023-24. Washington, DC: Policy Studies Associates.
- Anderson, L.M. (2024). Cohort 1, Year 1 outcomes and impacts: Brief #3 on the implementation and outcomes of the School Improvement Leadership Academy at the University of Maryland.
- Anderson, L.M., & Meredith, J. (2023). City Year effects on partner school performance from 2017-18 to 2021-22. Washington, DC: Policy Studies Associates.
- Anderson, L.M., Worley, S., Eleusizov, A., & Turnbull, B.J. (2023). Principal Pipeline Sustainability Guide. New York: The Wallace Foundation.
- Anderson, L.M., Bitzer, J., Hildreth, J., Lopez, A., & Meredith, J. (2023). NYC Service AmeriCorps alumni study: Understanding the NYC Service AmeriCorps experience. Washington, DC: Policy Studies Associates.

- Militello, M., Anderson, L.M., Blitz, M., Tredway, L., & Meredith, J. (2023). Instructional leadership is leadership for equity: Using teacher observations to improve equitable teaching practices. College of Education, East Carolina University.
- Anderson, L.M., Spector, J., Riley, D., & Kidd, S. (2022). Study of state policies to prohibit aiding and abetting sexual misconduct in schools. Washington, DC: U.S. Department of Education.
- Anderson, L.M., Aladjem, D.K., Fletcher, K., & Riley, D.L. (2021). A nation of readers: How state chiefs can help every child learn to read. Washington, DC: Council of Chief State School Officers.
- Aladjem, D.K., Anderson, L.M., Riley, D.L., & Turnbull, B.J. (2021). Principal pipeline self-study guide for districts. New York: The Wallace Foundation.
- Aladjem, D.K., Anderson, L.M., et al. (2020). Advancing school leadership, improvement, and equity in ten states. Washington, DC: Policy Studies Associates.
- Anderson, L.M., Meredith, J., & Hildreth, J. (2020). Reading Partners AmeriCorps alumni study. Washington, DC: Policy Studies Associates.
- Anderson, L.M., Meredith, J., Schmidt, R.A., Pratt-Williams, J., Jonas, D.L., & Vandersall, K. (2019). Study of the implementation of the ESEA Title I, Part C Migrant Education Program. Washington, DC: U.S. Department of Education.
- Woodworth, K., Chow, K., Chen, W., Anderson, L.M., Butler, A., Turnbull, B., Brayboy, B., & Hirshberg, D. (2019). Implementation of the Title VI Indian Education Formula Grants Program. Washington, DC: U.S. Department of Education.
- Anderson, L.M., & Turnbull, B.J. (2019). Sustaining a principal pipeline. Washington, DC: Policy Studies Associates.
- Anderson, L.M., Turnbull, B.J., & Arcaira, E.R. (2017). Leader tracking systems: Turning data into information for school leadership. Washington, DC: Policy Studies Associates.
- Anderson, L.M., Butler, A., Palmiter, A., & Arcaira, E. (2016). Study of emerging teacher evaluation systems. Washington, DC: U.S. Department of Education.
- Anderson, L.M., & Turnbull, B.J. (2016). Building a stronger principalship, Vol. 4: Evaluating and supporting principals. Washington, DC: Policy Studies Associates.
- Anderson, L.M., McElvain, C., Arcaira, E., Riley, D., & Mielke, M. (2014). 21st Century Community Learning Centers state competitions. Washington, DC: U.S. Department of Education.
- Turnbull, B. J., Riley, D. L., Arcaira, E. R., Anderson, L. M., & MacFarlane, J. R. (2013). Building a stronger principalship: Six districts begin the Principal Pipeline Initiative. Washington, DC: Policy Studies Associates.
- Turnbull, B. J., & Anderson, L. M. (2011). Government that works for schools and children: Defining an effective state role in Title I education. Washington, DC: Center for American Progress and American Enterprise Institute for Public Policy Research.
- Padilla, C., Tiffany-Morales, J., Bland, J., & Anderson, L. M. (2009). Evaluation of California's district intervention and capacity building initiative: Findings and lessons learned. Menlo Park, CA: SRI International.
- Turnbull, B. J., & Anderson, L. M. (2006). Comprehensive school reform as a district strategy: Final report. Washington, DC: Policy Studies Associates.
- Anderson, L. M., & Laguarda, K. G. (2006). Case studies of supplemental services under the No Child Left Behind Act: Findings from 2003-04. Washington, DC: U.S. Department of Education.
- Anderson, L. M., Fabiano, L., & Reisner, E. R. (2002). Using whole school improvement to increase student learning: Student achievement in schools assessed as demonstrating effective practices in Boston Public Schools. Washington, DC: Policy Studies Associates.
- Anderson, L. M. (2001). Effectiveness of district strategies for comprehensive school reform: A review of the literature. Washington, DC: Policy Studies Associates.
- Anderson, L. M., & Turnbull, B. J. (1998). Living in interesting times: Early state implementation of new federal education laws. Washington, DC: U.S. Department of Education.

Anderson, L. M., Panton, K. L. M., & Janger, M. I. (1995). An evaluation of state and local efforts to serve the educational needs of homeless children and youth. Washington, DC: U.S. Department of Education.

Anderson, L. M. (1990). NELS:88 base year ineligible survey field training manual. Chicago: NORC.

Selected Presentations

Eubanks, S., Snell, J. L., & Anderson, L.M. (2025). "Building a Pipeline of Leaders to Transform School Improvement Planning." Workshop presented at the Carnegie Foundation for Teaching's 2025 National Summit on Improvement, San Diego, CA.

Anderson, L.M., & Wilkerson, S. (2023). "State Laws and Policies to Prohibit Aiding and Abetting Sexual Misconduct in Schools." Paper presented at the 2023 American Educational Research Association Conference, Chicago, IL.

Anderson, L.M. (2022). "A Guide to Sustaining Principal Pipelines." Presented to district leaders, foundations, and policymakers in The Wallace Foundation's ARP Professional Learning Community.

Anderson, L.M. (2022). "Leader Tracking Systems—How to Collect and Use Data to Build a Principal Pipeline." Presented to state and district leaders in Wisconsin.

Anderson, L.M., Schmidt, R., & Jonas, D. (2019). "Study of the Implementation of the ESEA Title I, Part C Migrant Education Program." Briefing for the U.S. Department of Education.

Anderson, L.M. (2019). "From Teacher to Principal: Educational Leadership Tracking System." American Association of Colleges for Teacher Education (AACTE) webinar.

Anderson, L.M. (2018). "Leadership Tracking Systems: Turning Data into Information for School Leadership." Panel presentation at the 2018 AASA National Conference on Education, Nashville, TN.

Anderson, L.M., & Turnbull, B.J. (2017). "Building a Stronger Principalship: Evaluating and Supporting Principals." Panel presentation at The Wallace Foundation's annual conference on principal pipelines.

Anderson, L.M. (2006). "District Implementation of the Supplemental Educational Services Provision of NCLB: Findings from Year 2." Paper presented at the 2006 American Educational Research Association Conference, San Francisco, CA.

Anderson, L.M. (2002). "Applying Lessons Learned from State Implementation of the 1994 Reauthorization of ESEA: What Is the Capacity of States to Respond to the New Federal Legislative Agenda of 2001?" Paper presented at the 2002 American Educational Research Association Conference, New Orleans, LA.

Anderson, L.M. (1994). "Implementation Issues in Combining Service and Learning: The Student Literacy Corps." Symposium presentation at the 1994 American Educational Research Association Conference, New Orleans, LA.

A complete list of publications and conference presentations is available upon request.

JENNIFER BITZER

Senior Research Associate | Policy Studies Associates, Inc.

Education research and capacity-building professional who brings classroom teaching, school leadership, and research experience to technical assistance and evaluation projects for state education agencies, large urban school systems, the U.S. Department of Education, and national organizations—including the Region 4 (Mid-Atlantic) Comprehensive Center, where she has supported leader-development initiatives across five states. Her work helps states and districts design and implement evidence-based policies and practices across leader development, adolescent and elementary literacy (including the science of reading), mathematics curriculum and instruction, college and career readiness, financial literacy, and student engagement and attendance. She specializes in designing and managing mixed-methods evaluations that produce practical, accessible feedback for continuous improvement—developing interactive PowerBI data dashboards, reports, and tools that engage stakeholders, tighten the feedback loop, and inform decision-making for state, district, and program leaders.

Areas of Expertise

- **Capacity-building technical assistance & professional learning design.** Design and delivery of professional learning sessions for school and district leaders grounded in adult learning principles, including coaching; stakeholder engagement on scope and sequence; survey-based feedback loops for continuous improvement of TA delivery.
- **Leader development & principal pipelines.** Direct support to state-level leadership academies for aspiring principals, assistant principals, and superintendents; evaluation of SEED-funded principal/AP professional learning and statewide principal-preparation improvement.
- **Adolescent & elementary literacy curriculum, including the science of reading.** Evaluation of multi-state middle school literacy interventions and federally-funded early-literacy Innovative Approaches to Literacy work; experience leading instructional practices and curricular shifts including the science of reading.
- **Mathematics curriculum & instruction.** Evaluation of citywide high school Algebra 1 curriculum adoption (Illustrative Mathematics), engaging district and school leaders, teachers, and students.
- **College & career readiness.** Evaluation of pathways, work-based learning, and modern youth apprenticeship initiatives; development of theories of action and outcomes frameworks for district pathways offices.
- **Financial literacy.** Project management of state-level personal finance implementation resource development for elementary, middle, and high school instruction.
- **Student engagement & attendance.** Evaluation of full-service community school initiatives and reading motivation/engagement interventions; design of staff, parent, and student needs assessments.
- **Mixed-methods evaluation & data visualization.** Design and management of mixed-methods projects, statistical and qualitative analysis, and development of interactive PowerBI dashboards and accessible reports that drive decision-making.

Selected Project Experience

Building SEA and LEA Capacity Through Technical Assistance, Coaching, and Professional Learning

- **Region 4 (Mid-Atlantic) Comprehensive Center (U.S. Department of Education).** Supported technical assistance and leadership projects across five states, including reporting on national, state, and local policy issues relevant to the Center's work. Participated in the design and execution of professional development sessions for school and district leaders grounded in adult learning principles; solicited stakeholder input on scope and sequence of professional learning; created, distributed, and analyzed training feedback surveys; and facilitated leadership team discussions to inform continuous improvement of future sessions.
- **Delaware Leadership Network.** Supported design and implementation of professional development sessions for school and district leaders in Delaware; gathered stakeholder input on scope and sequence and analyzed feedback to inform improvement of future sessions.

Implementation Support and Coaching: Leadership Development and Principal Pipelines

- **Maryland leadership academies (Region 4 Comprehensive Center).** Provided technical support to multiple state-level leadership-development initiatives across Maryland—including The Next Level Maryland Leadership Academy for aspiring assistant principals and principals, the Calvert County Next Level Leadership Principal Academy, and the Next Generation of Maryland District Leaders: The Maryland Superintendent Academy—with responsibility for professional learning design and implementation and analysis of participant survey data to inform and improve future sessions.
- **School Improvement Leadership Academy / SILA (University of Maryland, U.S. DOE SEED grant).** Supported the evaluation of SILA, a professional development initiative for principals and assistant principals in Title I, Targeted Support and Improvement (TSI), and high-need schools in Delaware, Maryland, and New Jersey. Led analysis of the Comprehensive Assessment of Leadership for Learning (CALL) survey, administered to teachers at participating schools, and developed user-friendly PowerBI data dashboards to share with fellows to inform school improvement planning and teacher development.
- **Quality Measures (QM) principal preparation evaluation — Texas (EDC).** Led the evaluation of QM in Texas, focused on improving principal preparation programs statewide and reaching over half of all principal preparation programs in the state. Engaged regularly with QM support providers, principal preparation program staff and leadership teams, and state-level stakeholders. Led qualitative data collection and analysis and shared reporting and lessons learned from the implementation of the QM program to improve principal preparation at scale for both the EDC team and state-level stakeholders.

Adolescent & Elementary Literacy Curriculum (Science of Reading)

- **Middle School Literacy Initiative / MSLI (Reading Is Fundamental).** Supported the quasi-experimental evaluation of a multi-state intervention to improve reading confidence, reading frequency, and reading achievement scores among middle school students. Facilitated interviews and focus groups with students and staff and synthesizes both quantitative and qualitative data for the evaluation and reporting to stakeholders.
- **Innovative Approaches to Literacy / IAL early childhood (Reading Is Fundamental, U.S. DOE).** Contributes to the evaluation of the federally-funded IAL intervention to support the use of play-based early childhood education in District of Columbia Public Schools, through surveys, classroom observations, and focus groups.

Mathematics Curriculum & Instruction

- **NYC Solves — 9th Grade Algebra 1 (NYC Public Schools).** Managed the evaluation of the implementation of NYC Solves, the citywide 9th Grade Algebra 1 Illustrative Mathematics curriculum initiative, engaging district and school leaders, teachers, and students through interviews and focus groups. Synthesized key findings from qualitative data collection into case studies for NYCPS and stakeholders to inform future planning.

College & Career Readiness

- **NYC Public Schools Pathways Initiative (NYC Public Schools).** Supports the evaluation of the Career Ready Modern Youth Apprentice (CRMYA) and FutureReady NYC (FRNYC) programs in NYC high schools, in support of longer-term work toward a high-quality career-connected learning model. Led development of a Theory of Action to identify and inform key measurement frameworks and long-term strategic planning of the Office of Student Pathways. Supported quantitative analysis of the pilot year, managing student-level data across more than 15 data sources for over 1 million students to create a single database for analyzing demographics and performance. Co-leads design of a comprehensive outcomes framework to determine progress on priority initiatives and the 2030 career-connected learning goals.

Financial Literacy

- **Personal Finance Education Implementation Resources (NYSED).** Serves as project manager for the Personal Finance Implementation Resource Development for NYSED, leading the design and development of key materials—learning objectives, implementation resources, and instructional resources—to support the new requirement for Personal Finance instruction at the elementary, middle, and high school levels across the state. Collaborates closely with NYSED to develop supports while preserving district and school-level flexibility over

curriculum, resources, staffing, and instructional approaches, reflecting the goals of the NY Inspires plan and the New York State Portrait of a Graduate.

Student Engagement & Attendance

- **Partners for Rural Impact Full-Service Community Schools / FSCS (U.S. Department of Education).** Manages project components for the evaluation of seven FSCS grants in rural East Kentucky, Missouri, and Texas, including measurement and reporting on grant objectives, survey design and administration. Led the design and administration of staff, parent, and student needs assessments across three states and 24 school districts. Provides formative evaluation feedback to grant leaders and school-based teams through reporting and user-friendly PowerBI data dashboards; created and shared interactive dashboards of needs-assessment results with program teams to inform FSCS planning.
- **Summer Rising (NYC).** Supported the evaluation of Summer Rising, a summer academic and enrichment program delivered by DYCD and the NYC Department of Education. Managed survey development, design, and administration and analyzed participant and provider survey results, synthesizing findings into user-friendly data dashboards to inform planning of future services.
- **Summer Together social-emotional learning (San Francisco DCYF).** Supported evaluation of the Summer Together program, a citywide cross-agency system to expand access to summer learning and enrichment. Collected and analyzed pre- and post-test scores to identify the impact of implementing a social-emotional learning tool across summer programs.

Youth Workforce Development

- **Summer Youth Employment Program / SYEP (NYC DYCD).** Supported the evaluation of the SYEP, the largest summer employment program for youth in the U.S. Managed survey development, design, and administration; used quantitative methods to analyze participant and provider survey results; and synthesized themes and findings into user-friendly data dashboard reports to inform planning of future services.

Methodological Expertise

- **Mixed-methods evaluation design.** Design and management of evaluations integrating quantitative and qualitative methods to deliver actionable feedback for continuous improvement.
- **Quasi-experimental designs.** Experience supporting multi-state quasi-experimental evaluations of literacy and curricular interventions.
- **Survey design & administration.** Design, administration, and analysis of participant, provider, staff, parent, and student surveys, including multi-state needs assessments.
- **Qualitative methods.** Interviews, focus groups, and classroom observations, with synthesis of qualitative data into case studies and themes.
- **Data visualization & dashboards.** Development of interactive PowerBI dashboards and accessible reporting tools that engage practitioner, policy, and stakeholder audiences.
- **Theory of action & outcomes frameworks.** Development of theories of action, measurement frameworks, and outcomes indicators for district and state initiatives.
- **Professional learning design.** Design, delivery, and continuous improvement of professional learning sessions for school and district leaders, grounded in classroom-teaching and school-leadership experience.

Employment History

Policy Studies Associates. Washington, DC — Senior Research Associate	2022–Present
Annenberg Institute. Providence, RI — Research Assistant	2022
Memphis College Prep Elementary School. Memphis, TN — Director of Academics, Dean of K-2, Instructional Coach, Lead Teacher	2014–2021
Teach For America. Memphis, TN — First Grade Teacher	2014–2016

Education

Harvard Graduate School of Education — Ed.M., Education Policy and Analysis

Johns Hopkins University School of Education — M.S., Elementary Education and Teaching

Rhodes College — B.A., Psychology Major, Education Minor

Selected Reports and Publications

Bailey, E., Meredith, J., Miller, K., & Bitzer, J. (2024). Increasing middle school reading motivation: Preliminary results from a 3-year mixed methods study. Reading Is Fundamental.

Meredith, J., Fletcher, K., & Bitzer, J. (2024). Reading Is Fundamental Middle School Family Literacy Initiative: Year 2 Report. Washington, DC: Policy Studies Associates.

Fletcher, K., Bitzer, J., & Russell, C. (2023). SEL measurement in DCYF youth programs. San Francisco, CA: SF Department of Children, Youth & Their Families.

Fletcher, K., Bitzer, J., & Russell, C. (2023). Evaluation of Summer Together. San Francisco, CA: SF Department of Children, Youth & Their Families.

Meredith, J., Fletcher, K., & Bitzer, J. (2023). RIF Middle School Family Literacy Initiative: Year 1 Report. Washington, DC: Policy Studies Associates.

Anderson, L.M., Bitzer, J., Hildreth, J., Lopez, A., Meredith, J. (2023). NYC Service AmeriCorps alumni study: Understanding the NYC Service AmeriCorps experience. Washington, DC: Policy Studies Associates.

A complete list of publications and conference presentations is available upon request.

TIARA BOOKER-DWYER

Senior Policy Associate | Policy Studies Associates, Inc.

Education leader with more than two decades of experience spanning the science classroom, state education agencies, district governance, and higher education, now serving as a Senior Policy Associate at Policy Studies Associates. A former Assistant State Superintendent in Maryland and Deputy State Superintendent in Virginia, she has directed statewide school improvement, educator workforce, accountability, and instruction systems serving the most under-resourced schools. Deep expertise spanning educator and leadership pipelines, school improvement and accountability, college and career readiness, and Career and Technical Education (CTE), STEM and computer science education, the educator workforce and teacher retention, and federal grant administration under ESSA and Perkins V. Specializes in capacity-building technical assistance grounded in research and executive leadership experience, the design and facilitation of leadership academies and coaching, and the translation of policy and evidence into actionable tools for state, district, and practitioner audiences. Known for building trusted partnerships across agencies, school systems, higher education, and elected officials to advance student outcomes.

Areas of Expertise

- **Educator & leadership pipeline development.** Design and facilitation of academies, coaching, and summits that prepare superintendents, principals, and assistant principals for advancement, including career-lattice and pipeline tools developed with state and district partners.
- **School improvement & accountability.** Research-informed, tiered systems of support and statewide accountability systems under ESSA, including identification and exit processes for schools needing comprehensive and targeted support.
- **College & career readiness and CTE.** Statewide Career and Technical Education accountability, dual-credit and early-college pathways, work-based learning, and Perkins V administration.
- **STEM & computer science education.** Standards, curricula, and programs of study spanning K–12 and higher education, and cross-sector coalitions to expand the supply of well-prepared STEM educators.
- **Educator workforce & teacher retention.** Staffing models, strategic budgeting, induction, mentoring and coaching frameworks, and teacher-leadership strategies that improve retention and student outcomes.
- **Education policy & governance.** Legislative testimony, regulation, and State Board policy development, board governance, and fiscal and policy analysis of education legislation.
- **Federal grant administration & compliance.** Administration and monitoring of ESSA, Perkins V, and Comprehensive Literacy State Development (CLSD) grants against federal performance requirements.
- **Capacity-building technical assistance.** Preparation of technical assistance partners, professional learning for administrators and teachers, and translation of evidence into tools and guidance for state and district implementation.

Selected Project Experience

Implementation Support and Coaching: Leadership and Educator Pipelines

- **Maryland leadership academies (Policy Studies Associates).** Designed and facilitated the New Maryland Superintendent Meetings, Maryland Superintendent Academy, and Next Level Maryland Leadership Academy to prepare new and aspiring superintendents, principals, and assistant principals; more than 80% of participants earned promotions to leadership positions.
- **Career lattice & Assistant Principal Summit (OSSE & DC Public Schools).** Led development of a career lattice for the Office of the State Superintendent of Education to expand teacher career pathways, and launched the inaugural Assistant Principal Summit with DC Public Schools to prepare assistant principals for the principalship and other leadership roles.
- **Statewide leadership development & school improvement (Maryland State Department of Education).** As Assistant State Superintendent and Executive Director, led statewide leadership development and school

improvement strategy, including evidence-based professional learning, coaching, and tools for school and district leaders.

School Improvement & Accountability

- **Statewide school improvement model overhaul (Virginia Department of Education).** Directed a research-informed overhaul of the statewide school improvement model, restructuring agency roles and reallocating resources to improve student outcomes in the most under-resourced schools.
- **Tiered system of support (Maryland State Department of Education).** Established a data-driven, research-informed tiered system of support that contributed to 47% of schools federally identified for additional targeted support and improvement (ATSI) and 23% identified for comprehensive support and improvement (CSI) exiting status.
- **Blueprint for Maryland's Future implementation support (Accountability and Implementation Board).** As Strategy Lead, prepared technical assistance partners, applying implementation science, to support Maryland school systems implementing the Blueprint for Maryland's Future; approximately 90% of Maryland Blueprint Coordinators rated the support from technical assistance providers as helpful in advancing Blueprint objectives.
- **Assessment alignment & high-intensity tutoring evaluation (Virginia Department of Education).** Led revision and implementation of State Board policy to align math and reading proficiency expectations with National Assessment of Educational Progress (NAEP) benchmarks, and directed the evaluation of Virginia's \$418M investment in statewide high-intensity academic tutoring in math and literacy.

College & Career Readiness and CTE

- **Statewide CTE accountability systems (Maryland State Department of Education).** Designed and implemented statewide accountability systems for Career and Technical Education programs at high schools and two-year colleges, overseeing data collection and analysis to continuously improve academic programs and student transitions.
- **National CTE advisory leadership (Advance CTE).** Served on the Advance CTE Board of Directors and the Career Clusters National Advisory Committee, informing national frameworks for college and career readiness and CTE program quality.

STEM & Computer Science Education

- **STEM Teacher Talent Development Coalition (Policy Studies Associates).** Facilitated a regional cross-sector coalition of K–12, higher education, government, and community partners to increase the number of well-prepared STEM educators serving Philadelphia students.
- **Maryland STEM standards, computer science & programs of study (Maryland State Department of Education).** Established the Maryland STEM Standards of Practice, contributed to a national framework for K–12 computer science education, and provided technical assistance to school systems and higher education to plan and implement STEM, computer science, and related programs of study.

Educator Workforce & Teacher Retention

- **Research-based teacher retention course (Notre Dame of Maryland University).** Designed and delivered a graduate course on staffing models, strategic budgeting, induction, mentoring and coaching frameworks, and scheduling structures that improve teacher retention and student performance, integrating artificial intelligence tools and accessible design to support adult learning.
- **Educator workforce systems (Virginia Department of Education).** Oversaw the Office of Educator Workforce and led cross-functional teams to monitor and evaluate teacher preparation programs in higher education and K–12 school improvement initiatives, ensuring quality and effectiveness.

Education Policy, Governance & Federal Grants

- **Board governance & fiscal oversight (Baltimore County Public Schools).** As appointed School Board Member-at-large and elected School Board Chair, oversaw a \$2 billion operating and capital budget serving more than 110,000 students; developed and revised more than 300 board policies aligned with current research; chaired the Board Audit Committee; and maintained operational stability during challenging fiscal periods.

- **Legislative & regulatory policy (Virginia & Maryland).** Advised executive leadership and legislators on more than 150 education bills with fiscal and policy analysis, developed Code of Maryland Regulations (COMAR) and State Board policy, and—as MSDE Ombudsman—resolved complex constituent concerns referred by the Governor, legislators, and other officials.
- **Federal grant administration & compliance (Virginia & Maryland).** Oversaw administration and compliance of the Every Student Succeeds Act (ESSA), Perkins V, and Comprehensive Literacy State Development (CLSD) federal grants, monitoring program performance against federal requirements and approving grant applications for the release of federal and state funds.

Boards, Committees & Appointments

- Council of Chief State School Officers (CCSSO) National Conference on Student Assessment, Program Planning Committee (2024–2026)
- Board of Education for Baltimore County Public Schools (Chair, 2024–2025) (2023–2025)
- Maryland Association of Boards of Education, Legislative Committee (2023–2025)
- Advance CTE Career Clusters National Advisory Committee (2023–2025)
- Notre Dame of Maryland University Advisory Board (2021–Present)
- Advance CTE Board of Directors (2021–2022)
- Maryland Agricultural Education Foundation Board of Directors (2020–2025)
- Maryland Business Roundtable for Education, Strategic Steering Committee (2019–2025)
- Southern Regional Education Board, Making Schools Work Advisory Council (2019–2022)
- Governor’s Interagency Transition Council (2019–2022)
- Maryland Youth Apprenticeship Advisory Committee (2019–2022)
- U.S. Chamber of Commerce Foundation, Talent Pipeline Management Review Committee (2019–2022)

Employment History

Policy Studies Associates — Senior Policy Associate	2022–2025; 2026–Present
Notre Dame of Maryland University — Adjunct Professor	2025–Present
Virginia Department of Education — Deputy State Superintendent	2025–2026
Baltimore County Public Schools — School Board Chair & Member-at-Large	2023–2025
Maryland State Department of Education — Assistant State Superintendent & Executive Director	2017–2022
Maryland State Department of Education — Ombudsman	2016–2017
Maryland State Department of Education — Technology Education Supervisor	2014–2016
Maryland Business Roundtable for Education — Program Director	2013–2014
Maryland State Department of Education — STEM Coordinator & Specialist	2011–2013
Indian Creek Upper School — STEM Program Director & Science Teacher	2007–2011

Education & Credentials

Johns Hopkins University — Graduate Certificate in School Administration	2013
Johns Hopkins University — M.A., Biology	2008
Lincoln University — B.S., Biology	2003
Maryland Advanced Professional Educator License — Superintendent I/II, Administrator I/II, and Biology (grades 7–12) endorsements	2020–2030

Honors & Awards

- Advance CTE Rising Star Award (2021)
- The Daily Record Very Important Professionals Award (2020)
- Technology and Engineering Educators Association of Maryland, Technology and Engineering Leadership Award (2016)
- The Daily Record Leading Women Award (2015)
- National Academies of Science Ford Foundation Predoctoral Fellowship (2006–2008)

- DuPont Excellence in Teaching Award (2004)

Selected Reports and Publications

- Booker-Dwyer, T., et al. (2026). General Assembly report on the 2025 Virginia School Survey of Climate and Working Conditions: Summary of state-level results for Virginia public elementary and middle schools. Richmond, VA: Virginia Department of Education.
- Booker-Dwyer, T., et al. (2025). General Assembly report on the Office of School Improvement. Richmond, VA: Virginia Department of Education.
- Booker-Dwyer, T., et al. (2025). General Assembly report on the statewide assessment vendor. Richmond, VA: Virginia Department of Education.
- Booker-Dwyer, T., et al. (2023). Assistant principal advancement to the principalship: A guide for school districts. New York: The Wallace Foundation.
- Booker-Dwyer, T., et al. (2019). Principal evaluation guidebook and Professional standards for educational leaders rubric. Baltimore, MD: Maryland State Department of Education.
- Booker-Dwyer, T., et al. (2018). Leadership coaching guide. Baltimore, MD: Maryland State Department of Education.
- Booker-Dwyer, T., et al. (2017). Innovative school schedules: Recommendations to enhance student achievement. Baltimore, MD: Maryland State Department of Education.
- Booker-Dwyer, T., et al. (2016). A framework for K–12 computer science education.
- Booker-Dwyer, T., et al. (2013). Maryland State STEM Standards of Practice framework, instructional guide, lessons, professional development, and high school STEM curriculum. Baltimore, MD: Maryland State Department of Education.
- A complete list of professional activities, presentations, and publications is available upon request.*

JULIE MEREDITH

Senior Research Associate | Policy Studies Associates, Inc.

Senior research and impact-analysis leader with more than 15 years of experience designing and conducting evaluations of school accountability and reform policies, federal and state programs, and educational interventions at the local, state, and federal levels. As a Senior Research Associate at Policy Studies Associates, she partners with state education agencies, the U.S. Department of Education, foundations, and national organizations to build their capacity to collect appropriate data, measure program impact, and translate findings into clear narratives that inform decision-making. Her current Central Region portfolio includes co-leading the federal Full-Service Community Schools evaluation across rural Missouri and Kentucky for Partners for Rural Impact; leading impact analyses of Save the Children's rural literacy programming, including a summer reading intervention in Kansas; and supporting the Wallace Foundation's ESSA Leadership Learning Community partnership in Missouri. Her work supports states and districts across literacy and the science of reading (including adolescent literacy), chronic absenteeism and student engagement, mathematics curriculum and instruction, college and career readiness, leader development, the educator workforce, and the allocation of federal and state funds—grounded in econometric and statistical methods including experimental and quasi-experimental designs, multilevel models, difference-in-differences, regression discontinuity, geospatial analysis, and social network analysis.

Areas of Expertise

- **Capacity-building partnership with data systems.** Collaboration with clients to design data collection routines that minimize burden, improve data quality, and build organizational capacity to use evidence in program improvement.
- **Literacy curriculum & the science of reading (including adolescent literacy).** Multi-state evaluations of rural literacy and family-engagement literacy initiatives spanning elementary through middle school, including the impacts of supplemental supports and play-based early childhood approaches.
- **Chronic absenteeism & student engagement.** Quasi-experimental analyses of program effects on chronic absenteeism, attendance, and school climate; geospatial analysis mapping absenteeism patterns in rural communities.
- **Mathematics curriculum & instruction.** Quasi-experimental analyses of program effects on math and ELA proficiency rates across hundreds of partner schools.
- **Leader development.** Lead quantitative analyst on quasi-experimental evaluations of SEED-funded principal and assistant-principal professional learning initiatives and instructional-leadership programs.
- **Educator workforce development.** Multi-state evaluations of State Teacher Fellows programs and federal teacher-pipeline initiatives, including the Migrant Education Program.
- **College & career readiness.** Multi-state evaluation of educator-led college-readiness models and post-secondary preparation work in charter high schools.
- **Federal funding & resource allocation.** Federal grant performance reporting for full-service community schools; analyses of state policy diffusion under federal competitive grants (Race to the Top); ESSA state responsibilities and opportunities for school improvement.
- **Capacity-building technical assistance.** Quantitative support and evaluation of state leadership and capacity-building TA centers, including for CCSO and the Building State Capacity and Productivity Center.

Selected Project Experience

Subject-Matter Expertise: Literacy and the Science of Reading (Including Adolescent Literacy)

- **Save the Children U.S. Rural Education school-based literacy and math programs.** Leads annual evaluations and impact analyses of Save the Children's school-based literacy and math programs in high-poverty, rural Title I schools and currently leads a separate comparative study of its South Carolina community-based early childhood programs. Led a longitudinal study of COVID-19's impact on the literacy performance of Save the Children

participants, integrating administrative data, student assessment scores, and publicly available school-level data. Prior work has included a randomized controlled trial (RCT) in Mississippi, a summer reading intervention in Kansas, and program-impact analyses for Arkansas schools at the request of the Arkansas Department of Education.

- **Middle School Family Literacy Initiative (Reading Is Fundamental).** Principal investigator for the multi-state evaluation of an intervention to improve family engagement and middle school literacy—adolescent literacy work spanning multiple states and producing multi-year reports.
- **Innovative Approaches to Literacy / IAL early childhood (Reading Is Fundamental, U.S. Department of Education).** Principal investigator for the evaluation of a federally funded IAL intervention that supports play-based early childhood education in the District of Columbia Public Schools.
- **Reading Partners AmeriCorps alumni study.** Led survey analyses to assess the impact of program participation on AmeriCorps members' civic engagement, using national surveys of non-Corps members and prior surveys of AmeriCorps members to create matched comparison groups and examine differences in civic participation and volunteerism among Reading Partners alumni, other AmeriCorps participants, and the broader U.S. adult population.

Chronic Absenteeism & Student Engagement

- **City Year Whole School Whole Child model — multi-cohort impact analyses (AmeriCorps).** Leads quantitative analyses for three comprehensive studies of City Year's WSWC model since joining PSA, including a 2015 study (242 schools in 25 cities across 18 states), a 2019–2023 longitudinal study (325 schools in 29 cities across 21 states), and an ongoing follow-up study. Integrates state education datasets with City Year's administrative student and corps member data and survey responses. Uses quasi-experimental methods to assess impacts on multiple school performance indicators, including math and ELA proficiency rates, graduation rates, chronic absenteeism, and school climate measures. Adapts analytic approaches in collaboration with City Year staff to account for COVID-19 challenges to schools and AmeriCorps programming.
- **Full-Service Community Schools chronic absenteeism mapping (Partners for Rural Impact, U.S. Department of Education).** Co-PI for the evaluation of seven FSCS grants across East Kentucky, East Texas, and rural Missouri. Leads all federal grant performance reporting using administrative data from the Kentucky Department of Education and PRI's internal data systems. Uses geospatial analyses drawing on public and de-identified student-level data to map chronic absenteeism patterns in the rural context.
- **NYC Department of Youth and Community Development afterschool impact analysis.** Led longitudinal analysis of DYCD's afterschool program impacts on elementary and middle school students, managing and analyzing large, multi-year, student-level administrative datasets. Additionally, analyzed outcomes for DYCD's Summer Youth Employment Program and Community Needs Assessment survey data using a complex sampling design that incorporated Census block data to ensure the sample was representative of the population.

Subject-Matter Expertise: Mathematics

- **City Year math and ELA proficiency analyses.** Leads quasi-experimental quantitative analyses of City Year WSWC model effects on student math and ELA proficiency rates across 300+ partner schools in 29 cities, providing rigorous evidence of program impact on core academic outcomes.
- **Save the Children rural math programming.** Leads impact analyses of Save the Children's school-based math programs as part of its U.S. Rural Education portfolio in high-poverty, rural Title I schools.

Leader Development

- **School Improvement Leadership Academy / SILA (University of Maryland, U.S. DOE SEED grant).** Led the quasi-experimental design and analysis for the evaluation of SILA, a SEED-funded professional development initiative focused on strengthening leadership in Comprehensive Support and Improvement (CSI) and Targeted Support and Improvement (TSI) schools.
- **Project I4 — instructional leadership (East Carolina University, U.S. DOE SEED grant).** Led the quasi-experimental design and analysis for the evaluation of Project I4, a SEED-funded professional development initiative aimed at improving student performance through instructional leadership.

- **State efforts to strengthen school leadership (Council of Chief State School Officers).** Co-authored *State Efforts to Strengthen School Leadership: Insights from CCSSO Action Groups*, supporting state-level capacity-building on school leadership policy and practice.
- **ESSA Leadership Learning Community / ELLC — Missouri (The Wallace Foundation).** Supported the ESSA Leadership Learning Community partnership in Missouri, one of ten state-based teams of state officials, local district leaders, community members, and universities engaged in strengthening school leadership and school improvement under ESSA.

Educator Workforce Development

- **Hope Street Group State Teacher Fellows programs — cross-state evaluation.** Co-authored multi-year, multi-state evaluations of the Hope Street Group State Teacher Fellows programs, including the Kentucky State Teacher Fellows Program (Years Two and Three) and the cross-state synthesis.
- **ESEA Title I, Part C Migrant Education Program (U.S. Department of Education).** Co-authored the national *Study of the Implementation of the ESEA Title I, Part C Migrant Education Program*, informing federal understanding of how states, regions, school districts, and schools serve migratory children and youth.

College & Career Readiness

- **Pittsburgh Charter High Schools post-secondary preparation (Heinz Endowments).** Co-authored *Looking Inward to Keep “The Promise”: What Do Pittsburgh Charter High Schools Do to Prepare Students for Post-Secondary Education?*, examining school strategies for college preparation.
- **DYCD Transition to High School longitudinal analysis (NYC).** Co-author of the longitudinal analysis of DYCD's Transition to High School program for Cohorts 1 and 2, using student-level administrative data.

Federal & State Funding and Resource Allocation

- **Federal grant performance reporting — Full-Service Community Schools (Partners for Rural Impact, U.S. DOE).** Leads all federal grant performance reporting for seven FSCS grants across East Kentucky, East Texas, and rural Missouri, using administrative data from state education agencies and internal program data systems.
- **State responsibilities for school improvement under ESSA (CCSSO).** Co-authored *State Responsibilities and Opportunities for School Improvement under ESSA* for the Council of Chief State School Officers, supporting state capacity to direct federal and state improvement resources.
- **Race to the Top state policy diffusion (doctoral dissertation; peer-reviewed publication).** Authored a doctoral dissertation and a peer-reviewed *Educational Evaluation and Policy Analysis* article (with Russell, Childs, Stein, & Prine, 2015) examining the impact of federal competitive grants on state policymaking and the design of inter-organizational networks for implementing education reform.

Building SEA and LEA Capacity Through Technical Assistance, Coaching, and Professional Learning

- **Building State Capacity and Productivity Center evaluation.** Co-authored the Year 1 evaluation of the Building State Capacity and Productivity Center, supporting federal understanding of state-capacity TA delivery.
- **Library-based afterschool literacy programs (Free Library of Philadelphia LEAP).** Co-authored *Participation in Library-Based, Drop-In Afterschool Programs: Analysis of the Free Library of Philadelphia's LEAP Program*, supporting the program's continuous improvement through participation analysis.

Methodological Expertise

- **Experimental & quasi-experimental designs.** Design and execution of RCTs, matched-comparison designs, difference-in-differences, and regression discontinuity analyses for program impact estimation.
- **Multilevel & longitudinal models.** Multilevel models for clustered data and longitudinal analyses of student-, school-, and program-level outcomes using cross-sectional and panel data.
- **Survey design & administration.** Design and management of large- and small-scale surveys, including complex sampling designs that incorporate Census block data to achieve representative community samples.
- **Geospatial analysis.** Use of geographic data to map program reach, partnership evolution, and chronic absenteeism patterns in rural communities.

- **Social network analysis.** Analysis of relational data to understand partnership networks in community-school and education reform contexts.
- **Administrative & longitudinal data analysis.** Integration and analysis of multi-year, student-level administrative datasets across state education agencies, school districts, and AmeriCorps programs.
- **Federal grant reporting & data systems.** Federal grant performance reporting using state administrative data and program internal data systems.
- **Data visualization & translation.** Presentation of results in clear, accessible language and visualizations tailored to end-user needs.

Employment History

Policy Studies Associates. Washington, DC — Senior Research Associate 2013–Present
Carnegie Foundation for the Advancement of Teaching. Stanford, CA — Senior Researcher 2013
Learning Research and Development Center, University of Pittsburgh. Pittsburgh, PA
 Graduate Student Researcher 2009–2013

Education

University of Pittsburgh, School of Education — Ph.D., Administrative and Policy Studies
New York University, Tisch School of the Arts — B.F.A., Film and Television (with honors)

Selected Reports and Publications

- Meredith, J. (2026). The longitudinal impacts of supplemental literacy supports in rural elementary schools. *The Rural Educator*.
- Anderson, L.M., & Meredith, J. (2025). City Year effects on partner school outcomes from 2021-22 to 2023-24. Washington, DC: Policy Studies Associates.
- Meredith, J., Fletcher, K., & Bitzer, J. (2024). Reading Is Fundamental Middle School Family Literacy Initiative: Year 2 report. Washington, DC: Policy Studies Associates.
- Meredith, J. (2023). Impact of Save the Children school-age programming in rural Arkansas schools. Washington, DC: Policy Studies Associates.
- Anderson, L.M., & Meredith, J. (2023). City Year effects on partner school performance, 2017-18 through 2021-22. Washington, DC: Policy Studies Associates.
- Meredith, J. (2022). Impact of COVID-19 school closures on Save the Children participants. Washington, DC: Policy Studies Associates.
- Meredith, J., Fletcher, K.B., Russell, C.A., Impact of Summer Together 2021: Findings from a Quasi-Experimental Study.
- Aladjem, D., Meredith, J., & Kidd, S. (2021). Assessment of the DYCD Fatherhood program model. Washington, DC: Policy Studies Associates.
- Anderson, L.M., Meredith, J., & Hildreth, J. (2020). Reading Partners AmeriCorps alumni study. Washington, DC: Policy Studies Associates.
- Anderson, L.M., Meredith, J., Schmidt, R.A., Pratt-Williams, J., Jonas, D.L., & Vandersall, K. (2019). Study of the implementation of the ESEA Title I, Part C Migrant Education Program. Washington, DC: U.S. Department of Education.
- Riley, D., Meredith, J., & Butler, A. (2019). State responsibilities and opportunities for school improvement under ESSA. Washington, DC: Council of Chief State School Officers.
- Riley, D., & Meredith, J. (2017). State efforts to strengthen school leadership: Insights from CCSSO action groups. Washington, DC: Policy Studies Associates.
- Russell, J.L., Meredith, J., Childs, J., Stein, M.K., & Prine, D.W. (2015). Designing inter-organizational networks to implement education reform: An analysis of state Race to the Top applications. *Educational Evaluation and Policy Analysis*, 37(1), 92–112.

Meredith, J., & Anderson, L.M. (2015). Analysis of the impacts of City Year's Whole School Whole Child model on partner schools' performance. Washington, DC: Policy Studies Associates.

Meredith, J. (2013). State policy diffusion and Race to the Top: The impact of federal competitive grants on state policymaking (Doctoral dissertation). University of Pittsburgh.

A complete list of publications and conference presentations is available upon request.

DEREK L. RILEY

Managing Director | Policy Studies Associates, Inc.

Senior research, evaluation, and technical assistance leader with 24 years of experience managing TA and evaluation efforts for state education agencies, the U.S. Department of Education, foundations, and national organizations. Managing Director at Policy Studies Associates, he led the evaluation of the Region 4 (Mid-Atlantic) Comprehensive Center and has contributed to the national evaluation of the Comprehensive Center network and the U.S. Department of Education's development of program-wide CC measures of capacity-building, outcomes, and implementation. His work helps states and districts design and implement evidence-based policies and practices across literacy curriculum and the science of reading, financial literacy, leader development and principal pipelines, STEM curriculum and instruction, college and career readiness, federal and state funding and resource allocation, and student engagement. He has contributed to evaluation of the federal Full-Service Community Schools program across rural Missouri and other rural communities, examining program solutions related to kindergarten readiness, academic growth, workforce development, and community health, and supported the ESSA Leadership Learning Community partnership in Nebraska. A former teacher in diverse settings, he is skilled at collecting data from youth, educators, and stakeholders and at translating evidence into actionable, timely products for mid-course corrections, strategic planning, and continuous improvement.

Areas of Expertise

- **Comprehensive Center evaluation & capacity-building TA.** Led evaluation of the Region 4 Comprehensive Center; contributed to national evaluation of the CC network and to U.S. DOE's development of program-wide CC measures of capacity-building, outcomes, and implementation.
- **Literacy curriculum & the science of reading.** Co-author of national resource for state chiefs aligning curricula, assessments, and professional learning to the science of reading; state TA on dyslexia and dysgraphia policy.
- **Financial literacy.** Developed New York State's Personal Finance Education Learning Objectives; delivered statewide webinar for approximately 1,200 district and school leaders; developing additional implementation resources and trainings.
- **Leader development & principal pipelines.** Multi-year research on the Wallace Foundation Principal Pipeline Initiative; co-author of the *Principal Pipeline Self-Study Guide* used in 90+ districts nationally; CCSSO state-leadership action groups.
- **STEM curriculum, instruction & policy.** Director of evaluation for the National Science Foundation's Community Advancing Discovery Research in Education (CADRE) resource network serving ~400 NSF grantees; co-author of national STEM teacher leadership work for U.S. DOE Office of Innovation and Improvement.
- **College & career readiness.** Evaluation of the NYC Summer Youth Employment Program; policy brief for the Center for American Progress on extended learning time in high schools; contribution to evaluation of the federal Full-Service Community Schools program including kindergarten readiness, academic growth, and workforce development.
- **State school improvement policy & funding allocation.** Lead author of *State Responsibilities and Opportunities for School Improvement under ESSA* for CCSSO; director of Washington State OSPI Model Evaluation Plan for state-funded education programs; multi-year work on state special education tuition rate-setting methodology.
- **Measurement & continuous improvement.** Co-authored a report on system strategies to strengthen education systems across 10 districts for the Asia Society.

Selected Project Experience

Comprehensive Center Evaluation: Building SEA and LEA Capacity Through Technical Assistance and Continuous Improvement

- **Region 4 (Mid-Atlantic) Comprehensive Center evaluation (U.S. Department of Education).** Led the evaluation of the Region 4 Comprehensive Center, reporting quantitative and qualitative data for federal reporting and

continuous improvement. Authored the *Final Evaluation Report of the Region 4 Comprehensive Center* (2025) and worked with the center's project teams to use evaluation data for continuous improvement.

- **National Comprehensive Center Network development of network evaluation measures (U.S. Department of Education).** Provided support to the U.S. Department of Education on the development of program-wide Comprehensive Center measures of capacity-building, outcomes, and implementation, in partnership with two Centers (MC3 and TCC) and involvement of all Centers in the network.
- **National evaluation of the federal Comprehensive Technical Assistance Centers (U.S. Department of Education, IES).** Analyzed and reported on the Centers' work in support of NCLB and ARRA implementation. Co-authored interim and final reports including chapters detailing how Centers negotiated and delivered services to SEAs, achieved capacity building outcomes, and implemented services. Managed qualitative analysis and site visitor training; developed and piloted client survey instruments providing relevance and usefulness ratings for GPRA purposes.

Literacy Curriculum & the Science of Reading

- **A Nation of Readers (Council of Chief State School Officers).** Co-author of the national resource guiding state chiefs, IHEs, and other stakeholders to align curricula, assessments, and professional learning to the science of reading.
- **New York State Dyslexia & Dysgraphia Task Force (NYSED).** Facilitated and managed data from the state-legislated 49-member task force of practitioners, district leaders, providers, advocates, and parents. Co-authored the *New York State Dyslexia and Dysgraphia Task Force: Report and Recommendations* for delivery to the Governor and state legislative bodies.

Financial Literacy

- **Personal Finance Education Learning Objectives (NYSED).** Developed New York State's Personal Finance Education Learning Objectives; presented the objectives and other guidance in a statewide webinar for approximately 1,200 district and school leaders. Currently developing additional resources and trainings for local implementation.

Implementation Support and Coaching: Leadership Development and Principal Pipelines

- **Principal Pipeline Initiative & district tools (The Wallace Foundation).** Contributed to research and support of multiple Wallace Foundation initiatives for the improvement of school leadership. Conducted research on the Principal Pipeline Initiative over a six-year period, co-authoring several reports on implementation and promising district practices. Co-authored the *Principal Pipeline Self-Study Guide for Districts* and researched its implementation in a national pilot involving 90+ districts.
- **ESSA Leadership Learning Community / ELLC (The Wallace Foundation).** Supported and researched implementation of the ESSA Leadership Learning Community initiative over a five-year period, contributing to findings on ten novel state partnerships—including Nebraska—among state and district superintendents and staffs, Urban League affiliates, universities, and other partner organizations.
- **CCSSO state-leadership action groups and SEA leadership priorities.** Directed studies on school improvement and school leadership, including state collaborative networks facilitated by CCSSO. Co-authored *State Efforts to Strengthen School Leadership: Insights from CCSSO Action Groups* and *School Leadership Priorities and Programs in Thirteen State Education Agencies*.
- **Executive Leadership Program / ELP (The Wallace Foundation, University of Virginia and Harvard University).** Collected data from participating leaders of state departments of education and districts; investigated district and state collaboration and implementation of improvement strategies; and analyzed participant perspectives on implementation, impact, and sustainability.

STEM Curriculum, Instruction & Policy

- **Community Advancing Discovery Research in Education / CADRE (National Science Foundation).** Under an NSF grant, directed evaluation for CADRE, a resource network serving approximately 400 grant projects funded by the National Science Foundation's Discovery Research K-12 program. Administered over 20 surveys to grantees regarding outcomes from CADRE services and grantee needs; provided timely formative feedback for continuous

improvement and adaptation; and convened groups of researchers, providers, and practitioners to identify and document promising strategies in partnerships for STEM education. Authored *Moving STEM Education Forward: A Spotlight Brief on National Priorities and the National Science Foundation's DRK-12 Program*.

- **Building STEM Teacher Leadership (U.S. Department of Education Office of Innovation and Improvement).** Project manager for the PSA portion of an initiative to analyze and support STEM teacher leadership across the nation. Task leader for the development and facilitation of six work groups of experts and practitioners. Contributed to a convening of experts in STEM teacher leadership and to analysis of gaps between STEM and STEM-neutral teacher leader programs.

College & Career Readiness

- **NYC Summer Youth Employment Program (DYCD).** Led evaluation of the NYC Summer Youth Employment Program, the largest summer employment program of its type in the U.S., providing timely reports and debriefings to support DYCD planning and implementation.
- **Partners for Rural Impact Full-Service Community Schools (U.S. Department of Education).** Contributed to evaluation of five grant recipients across East Kentucky, Texas, and rural Missouri. Investigated program solutions related to kindergarten readiness, academic growth, workforce development, and community health, providing actionable feedback to program leaders for improved services.
- **Extended learning time in high schools (Center for American Progress).** Commissioned to write a policy brief on extended learning time in high schools and how it can support teacher practice.

State School Improvement Policy & Funding Allocation

- **State Responsibilities and Opportunities for School Improvement under ESSA (CCSSO).** Lead author of the report incorporating policy analysis and survey data from 43 state educational agencies on state policy-making and policy implementation for Comprehensive Support and Improvement school and district improvement.
- **Washington State Model Evaluation Plan and Handbook (OSPI).** Directed the development of a Model Evaluation Plan for all state-funded education programs in Washington State, in response to the state Senate. Led collaborative development with OSPI state program managers, the Office of Student Information, and the state Research and Data Center. Authored the *Handbook for Evaluating Washington State Education Programs*, providing internal guidance for state managers and evaluators on measures and conducting evaluations that provide useful feedback for accountability and improvement.
- **Special education tuition rate-setting methodology (NYSED).** Supporting a multi-year effort to revise the special education tuition rate-setting methodology for state-approved K-12 providers and preschool programs.

Measurement and Continuous Improvement

- **System strategies to advance educational equity (Asia Society).** Senior member of a team that documented system-level improvement efforts in 10 school districts, producing a public report for Asia Society.

Student Engagement & Community Initiatives

- **Opportunity Starts with a Home — NYC Youth Homelessness Demonstration Project (NYC DYCD, HUD).** Co-led support and development of NYC's comprehensive plan for reducing youth homelessness, *Opportunity Starts with a Home*, drawing from input from a large year-long work group involving multiple NYC agencies, service providers, advocacy organizations, researchers, and funders. The plan was accepted in full by the U.S. Department of Housing and Urban Development.
- **Summer Rising (NYC DYCD and NYC Department of Education).** Contributed to evaluation of Summer Rising, a summer academic and enrichment program delivered by DYCD and the NYC Department of Education.

Methodological Expertise

- **Federal evaluation & accountability frameworks.** Design and execution of evaluations meeting federal reporting requirements, including GPRA-aligned client surveys and program-wide outcome and implementation measures.
- **Mixed-methods evaluation design.** Design and management of evaluations integrating qualitative and quantitative methods for federal TA programs, state agencies, and pilot initiatives.

- **Survey design & administration.** Design and administration of surveys at scales ranging from 8 to 40,000 respondents, achieving high response rates and producing actionable findings.
- **Qualitative data analysis.** Design of systems for qualitative analysis and integration with quantitative data using ATLAS.ti, NVivo, Dedoose, and Excel.
- **Facilitation of work groups & cross-sector convenings.** Facilitation of practitioners, researchers, and policymakers in work groups and national task forces, including state-legislated task forces.
- **Policy analysis.** Policy analysis incorporating data from state educational agencies on school improvement, leadership, and federal program implementation.
- **Translation & reporting.** Delivery of accessible, actionable, and meaningful reports and briefings tailored to strategic planning, continuous improvement, outcome reporting, and funding-decision audiences.

Employment History

Policy Studies Associates. Washington, DC — Managing Director	2006–Present
Waiakea High School. Hilo, HI — High School Language Arts Teacher	2003–2006
Policy Studies Associates. Washington, DC — Research Associate	1998–2003
Tucson Unified School District. Tucson, AZ — Middle School Language Arts Teacher	1996–1997
Wediko Children's Services. Hillsboro, NH — Elementary Special Education Teacher	1994–1996

Education

Harvard Graduate School of Education — Ed.M., Administration, Planning, and Social Policy	1998
Miami University — B.S., English Education (Endorsements in Sociology and Psychology)	1994

Selected Reports and Publications

- New York State Education Department. (2026). New York State Education Department Personal Finance Education Learning Objectives.
- Riley, D. (2025). Final evaluation report of the Region 4 Comprehensive Center. Washington, DC: Policy Studies Associates.
- New York State Dyslexia and Dysgraphia Task Force. (2024). New York State Dyslexia and Dysgraphia Task Force: Report and recommendations. NY: New York State Education Department.
- New York City YHDP Planning Committee. (2022). Opportunity Starts with a Home: New York City's Plan to Prevent and End Youth Homelessness. New York City, NY.
- Anderson, L.M., Aladjem, D.K., Fletcher, K., & Riley, D.L. (2021). A nation of readers: How state chiefs can help every child learn to read. Washington, DC: Council of Chief State School Officers.
- Aladjem, D.K., Anderson, L.M., Riley, D.L., & Turnbull, B.J. (2021). Principal pipeline self-study guide for districts. Washington, DC: Policy Studies Associates.
- Riley, D., & Russell, C.A. (2020). System strategies to advance educational equity. New York, NY: Asia Society.
- Riley, D., Meredith, J., & Butler, A. (2019). State responsibilities and opportunities for school improvement under ESSA. Washington, DC: Council of Chief State School Officers.
- Riley, D., Meredith, J., Hildreth, J., Butler, A., & Turner, T. (2018). School leadership priorities and programs in thirteen state education agencies. Washington, DC: Policy Studies Associates.
- Riley, D., & Meredith, J. (2017). State efforts to strengthen school leadership: Insights from CCSO action groups. Washington, DC: Policy Studies Associates.
- Turnbull, B.J., Anderson, L.M., Riley, D.L., MacFarlane, J.R., & Aladjem, D.K. (2016). Building a stronger principalship, Vol. 5: The Principal Pipeline initiative in action. Washington, DC: Policy Studies Associates.
- U.S. Department of Education, Office of Innovation and Improvement. (2016). Building STEM teacher leadership. (Contributor.)

Riley, D., Arcaira, E.R., Coleman, S., Hildreth, J., McCann, C., & White, R.N. (2014). Handbook for evaluating Washington State education programs: A model evaluation plan. Washington, DC: Policy Studies Associates.

Riley, D., McCann, C., & Woods, Y. (2013). Moving STEM education forward: A spotlight brief on national priorities and the National Science Foundation's DR K-12 program. Washington, DC: CADRE.

Turnbull, B.J., White, R.N., Sinclair, E., Riley, D., & Pistorino, C. (2011). National evaluation of the Comprehensive Technical Assistance Centers: Final report (NCEE 2010-4031). Washington, DC: U.S. Department of Education.

A complete list of publications and conference presentations is available upon request.

MOLLIE RUBIN

Senior Research Associate | Policy Studies Associates, Inc.

Education policy researcher, program evaluator, and capacity-building partner with deep expertise in leader development and principal pipelines, qualitative methods, and district and school improvement. Senior Research Associate at Policy Studies Associates and former Research Assistant Professor at Vanderbilt University's Peabody College, where she secured federal and foundation grants and led large-scale evaluations of education leadership and instructional improvement initiatives. Her work helps states and districts design and implement evidence-based policies and practices across leader development and principal pipelines, the educator workforce (including teacher evaluation and talent management), literacy curriculum and the science of reading, mathematics curriculum and instruction, college and career readiness, and continuous improvement—grounded in extensive partnership with school districts, state education agencies, and policymakers. Record of publications in peer-reviewed journals including *Educational Administration Quarterly*, *Educational Researcher*, and *American Journal of Education*, and reports for practitioners and policymakers.

Areas of Expertise

- **Leader development & principal pipelines.** Multi-year, Wallace Foundation-funded research on principal pipelines, principal supervisors, and the assistant principal role across multiple urban districts; co-author of four foundational Wallace Foundation reports on planning, developing, sustaining, and strengthening leadership pipelines.
- **Educator workforce: teacher evaluation, talent management & analytics.** Peer-reviewed research on multi-measure teacher evaluation systems, central-office supports for data-driven talent decisions, talent analytics in districts, and information-rich hiring.
- **Literacy curriculum & the science of reading.** Contribution to the New York State Dyslexia and Dysgraphia Task Force—policy analysis, literature synthesis, subcommittee facilitation, and contribution to the report delivered to the Governor and state legislature.
- **Mathematics curriculum & instruction.** Evaluation of citywide adoption of a new ninth grade Algebra I curriculum (Illustrative Mathematics) for NYC Public Schools.
- **College & career readiness.** Evaluation of NYC's Pathways Advising Pilot for college and career advising; support for GEAR UP grant evaluation including development of a profile of a learner to inform graduation and postsecondary enrollment and persistence work.
- **Continuous improvement & research-practice partnerships.** Continuous improvement methods (PDSA cycles, network improvement communities) and research-practice partnerships designing and implementing site-specific interventions in large public high schools.
- **Qualitative research methods.** Graduate instruction in applied qualitative methods at Vanderbilt; design and implementation of large-scale, multi-site qualitative and mixed-methods studies.

Selected Project Experience

Implementation Support and Coaching: Leadership Development and Principal Pipelines

- **Implementing for Sustainability: Principal Pipelines in Four Districts (The Wallace Foundation, 2025).** Co-author of Wallace Foundation's most recent principal pipeline research, examining how four districts implement and sustain principal pipelines for long-term impact.
- **Planning and Developing Principal Pipelines (The Wallace Foundation, 2023).** Co-author of the foundational Wallace Foundation study examining the approaches, opportunities, and challenges that districts encounter as they plan and develop principal pipelines.
- **The Role of Assistant Principals: Evidence and Insights for Advancing School Leadership (The Wallace Foundation, 2021).** Co-author of the Wallace Foundation report synthesizing evidence and insights on the

assistant principal role as a steppingstone to the principalship and as a lever to strengthen leadership pipelines and broaden access to the principalship.

- **Changing the Principal Supervisor Role (The Wallace Foundation, 2020).** Co-author of the evaluation of the Principal Supervisor Initiative, examining how districts changed the principal supervisor role to better support principals.
- **Assistant Principal Role research — current PSA project.** Co-Director of a research study of the assistant principal role in three districts to address knowledge gaps and inform efforts to strengthen leadership development. The study builds a knowledge base about AP career trajectories and how the role can serve as a stronger steppingstone to the principalship and an effective lever to improve schools and school leadership.

Educator Workforce: Teacher Evaluation, Talent Management & Analytics

- **School Districts' Use of Talent Analytics (peer-reviewed).** Co-author of *School Districts' Use of Talent Analytics: Barriers and Possibilities* (Rogers, Cox, Goldring, Moyer, Neumerski, & Rubin, 2025), *Journal of Education Human Resources*, 43(2), 432–442.
- **Central Office Supports for Data-Driven Talent Management Decisions (peer-reviewed).** Co-author of *Central Office Supports for Data-Driven Talent Management Decisions: Evidence from the Implementation of New Systems for Measuring Teacher Effectiveness* (Grissom, Rubin, Neumerski, Cannata, Drake, Goldring, & Schuermann, 2017), *Educational Researcher*, 46(1), 21–32.
- **Using Teacher Effectiveness Data for Information-Rich Hiring (peer-reviewed).** Co-author of *Using Teacher Effectiveness Data for Information-Rich Hiring* (Cannata, Rubin, Goldring, Grissom, et al., 2017), *Educational Administration Quarterly*, 53(2), 180–222. Voted Subscribers' Personal Favorite Study of 2017 by the National Council on Teacher Quality.

Literacy Curriculum & the Science of Reading

- **New York State Dyslexia & Dysgraphia Task Force (NYSED).** Contributed to the team providing technical assistance and support to the state-legislated 49-member Task Force. Duties included contributing to policy analysis, synthesizing extant literature, facilitating subcommittee discussions, attending public hearings, and developing and synthesizing Task Force recommendations. Assisted in writing the final report delivered to the Governor and state legislature.

Mathematics Curriculum & Instruction

- **NYC Solves — Algebra I Illustrative Mathematics implementation (NYC Public Schools).** Member of the team evaluating the adoption of a new ninth grade Algebra I curriculum (Illustrative Math). Designed protocols for interviews and focus groups with central office leaders, curriculum developers, students, teachers, department heads, and school administrators. Participated in regular meetings with the NYCPS team overseeing the initiative, provided ongoing feedback on implementation, and supported the final report.

College & Career Readiness

- **NYC Public Schools Pathways Advising Pilot.** Co-leader of the evaluation of the Pathways Advising Pilot initiative aimed at preparing advisors to provide one-on-one college and career advising throughout the high school experience. Designed evaluation strategies and instruments for qualitative data collection; led interviews and focus groups with school-based college and career advisors, counselors, work-based learning coordinators, and students; and synthesized findings into reports and briefings to support implementation, training, and program improvement.
- **GEAR UP Grand Island Public Schools (Nebraska, U.S. Department of Education).** Supported the evaluation of the seven-year federal GEAR UP grant. Most recently assisting the district's work to develop a profile of a learner to supplement ongoing work to increase graduation, preparedness for and enrollment in, and persistence in postsecondary education.

Continuous Improvement & Research-Practice Partnerships

- **National Center on Scaling Up Effective Schools / NCSU (Vanderbilt University).** Served as Assistant Director, coordinating a research-practice partnership using continuous improvement to design and implement site-

specific interventions to improve students' educational experiences and outcomes in large public high schools. Trained and supported teams of teachers and school-based administrators to conduct Plan-Do-Study-Act (PDSA) cycles to design interventions, monitor implementation, and refine them. Supported network improvement communities and implemented rapid-feedback approaches to bring timely information to research partners.

- **Tennessee Education Research Alliance / TERA (Vanderbilt University).** Faculty Affiliate. Collaborated with researchers from multiple institutions in the development, coordination, and implementation of research studies. Presented research findings to university partners and state education leaders.

Methodological Expertise

- **Qualitative research methods.** Design and implementation of large-scale, multi-site qualitative studies including interviews, focus groups, document review, and observation; graduate instruction in applied qualitative methods.
- **Mixed-methods evaluation.** Design and implementation of mixed-methods studies on school and district improvement, leader development, teacher collaboration, instructional improvement, and educator evaluation.
- **Program implementation & evaluation.** Large-scale program implementation evaluations on local, state, and national levels, with coordination of multiple state and district agencies.
- **Continuous improvement & improvement science.** Plan-Do-Study-Act cycles, network improvement communities, and rapid-feedback approaches to support partner sites.
- **Research-practice partnerships.** Design, coordination, and implementation of research-practice partnerships with state education agencies, school districts, and policymakers.
- **Synthesis & translation.** Development and delivery of accessible reports, research syntheses, briefings, and trainings to research partners and practitioner audiences.

Employment History

Policy Studies Associates. Washington, DC — Senior Research Associate	2023–Present
Vanderbilt University, Peabody College of Education and Human Development. Nashville, TN Research Assistant Professor, Department of Leadership, Policy, and Organizations	2012–2023
Vanderbilt University, College of Arts & Sciences. Nashville, TN — Lecturer, Department of Sociology	2022–2023
New York City Department of Education (Abraham Lincoln Intermediate School). Teacher (secondary social studies, NY certified) and Debate Team Coach	2001–2004

Education

University of Pennsylvania — Ph.D., Sociology
University of Pennsylvania — M.A., Sociology
University of Pennsylvania — B.A., Sociology (Magna Cum Laude, Phi Beta Kappa)
Brooklyn College, The City University of New York — Credentialing Coursework in Secondary Social Studies Education
Community College of Philadelphia — Honors Humanities Program (Dean's List)

Selected Reports and Publications

- Goldring, E., Rubin, M., & McGraw, K.J. (2025). Implementing for sustainability: Principal pipelines in four districts. The Wallace Foundation.
- Rogers, L.K., Cox, A., Goldring, E., Moyer, A., Neumerski, C., & Rubin, M. (2025). School districts' use of talent analytics: Barriers and possibilities. *Journal of Education Human Resources*, 43(2), 432–442.
- Gordon, M.F., Grissom, J.A., Blanchard, A., Ellison, A.B., Rubin, M., & Santelli, F.A. (2024). Applying to lead: A mixed-methods investigation of prospective principals' job application strategies in two urban districts. *Educational Administration Quarterly*.
- Goldring, E., Rubin, M., Rogers, L., Neumerski, C.M., Moyer, A., & Cox, A. (2023). Planning and developing principal pipelines: Approaches, opportunities, and challenges. The Wallace Foundation.

- Goldring, E., Rubin, M., & Herrmann, M. (2021). The role of assistant principals: Evidence and insights for advancing school leadership. The Wallace Foundation.
- Cannata, M., Rubin, M., & Neel, M.A. (2021). From fidelity to integrity: Navigating flexibility in scaling up a statewide initiative. *American Journal of Education*, 127(2), 233–263.
- Rubin, M., Goldring, E.B., Neel, M.A., Rogers, L., & Grissom, J.A. (2021). Changing principal supervision to develop principals' instructional leadership capacity. In P. Youngs, J. Kim, & M. Mavrogordato (Eds.), *Exploring principal development and teacher outcomes* (pp. 41–55). Routledge.
- Goldring, E.B., Clark, M.A., Rubin, M., Rogers, L.K., Grissom, J.A., Gill, B., Kautz, T., McCullough, M., Neel, M., & Burnett, A. (2020). Changing the principal supervisor role to better support principals: Evidence from the Principal Supervisor Initiative. The Wallace Foundation.
- Grissom, J.A., Rubin, M., Neumerski, C.M., Cannata, M., Drake, T.A., Goldring, E., & Schuermann, P. (2017). Central office supports for data-driven talent management decisions: Evidence from the implementation of new systems for measuring teacher effectiveness. *Educational Researcher*, 46(1), 21–32.
- Cannata, M., Rubin, M., Goldring, E., Grissom, J.A., Neumerski, C.M., Drake, T.A., & Schuermann, P. (2017). Using teacher effectiveness data for information-rich hiring. *Educational Administration Quarterly*, 53(2), 180–222. (Voted Subscribers' Personal Favorite Study of 2017, NCTQ Teacher Quality Bulletin.)
- Rubin, M., Patrick, S.K., & Goldring, E.B. (2017). Dilemmas of prescriptive practices and perceived alignment in program implementation. *Peabody Journal of Education*, 92(5), 609–626.

A complete list of publications and conference presentations is available upon request.

CHRISTINA A. RUSSELL

Co-Owner & Principal | Policy Studies Associates, Inc.

Capacity-building and evaluation leader with more than 25 years of experience providing technical assistance, evidence-based strategic planning, and mixed-methods evaluation to state education agencies, city and county government agencies, the U.S. Department of Education, foundations, and national organizations. Co-Owner & Principal of Policy Studies Associates, she serves as a long-term evaluation and capacity-building partner to public agencies—including the Region 4 (Mid-Atlantic) Comprehensive Center (2019-2024), she supported SEAs in the District of Columbia, Delaware, Maryland, New Jersey, and Pennsylvania. Her work helps states and districts design and implement evidence-based policies and practices related to literacy and the science of reading, mathematics curriculum and instruction, college and career readiness, financial literacy, student attendance and engagement, youth and adult workforce development, cross-sector community partnerships, and funding and resource allocation. She directs federal grant evaluations of 21st Century Community Learning Centers, GEAR UP, and Full-Service Community Schools. She specializes in collaborative project design that produces ongoing, actionable feedback for continuous improvement, scale, and sustainability, and in translating findings into accessible reports, briefings, tools, and trainings.

Areas of Expertise

- **Capacity-building technical assistance to SEAs and public agencies.** Long-term partnerships with state and city agencies to identify improvement priorities, leverage existing resources and partnerships, and design and deliver TA that builds capacity for evidence-based policy and practice.
- **Literacy & the science of reading.** State task forces and development of policy resources on dyslexia, dysgraphia, and early-grades literacy; evaluation of citywide and library-based literacy initiatives aligned to early-grade reading goals.
- **Mathematics curriculum & instruction.** Formative evaluation of district math instructional redesign initiatives, generating feedback on implementation strategies and support needs to inform continuous improvement.
- **College & career readiness.** Evaluation and measurement strategy for career-connected learning, work-based learning, and dual enrollment initiatives, including analysis of impact on postsecondary pathways.
- **Financial literacy.** Direct TA to state and local agencies on the development of resources and guidance for implementation of personal finance education requirements.
- **Student attendance & engagement.** Evaluation of community school and out-of-school time initiatives addressing chronic absenteeism, including geospatial analysis to identify absenteeism “hot spots” in rural communities.
- **Youth & adult workforce development.** Evaluation of youth employment, apprenticeship, and pathways initiatives; capacity-building for the adult workforce serving young people, including credentialing, leadership development, and professional learning.
- **Funding & resource allocation.** Funding strategy, monitoring systems, and measurement frameworks that help public agencies and funders target resources for impact.
- **Mixed-methods evaluation & performance management.** Collaborative project design integrating administrative data, surveys, interviews, focus groups, and observations to deliver actionable feedback for continuous improvement, scale, and sustainability.

Selected Project Experience

Building Capacity Through Technical Assistance, Coaching, and Professional Learning

- **Region 4 (Mid-Atlantic) Comprehensive Center (U.S. Department of Education).** From 2019-2024, provided capacity-building services to State Education Agencies in the District of Columbia, Delaware, Maryland, New Jersey, and Pennsylvania. Collaborated with state leaders and staff to identify priorities for improvement; leveraged existing resources, research, and partnerships; and delivered technical assistance—including coaching

and professional learning grounded in adult learning principles— that built capacity to design and implement evidence-based policies and practices. Projects included support to the District of Columbia Office of the State Superintendent of Education (OSSE) in designing a process for revising state content standards and aligning agency supports for school climate and culture; work with the Delaware Department of Education to strengthen performance management systems by supporting cabinet staff in creating performance goals, partnering with the department leadership to clarify priorities, and informing revisions to the employee evaluation system; and co-leading a District of Columbia cross-agency task force charged with determining a sustainable solution for delivering educational services for justice-involved young adults.

- **New York City Department of Youth and Community Development (DYCD).** Directs PSA's evaluation and capacity-building partnership with DYCD since 2005. Leads action-oriented evaluation and stakeholder engagement for workforce programs, community development programs, and youth programs. Advised the redesign of the agency-wide Evaluation & Monitoring System for use by agency staff in contract management and quality improvement, developing indicators, training materials, and rubrics in collaboration with DYCD staff, providers, and IT system developers. Co-facilitated Theory of Change development with the DYCD Executive Team—engaging stakeholders from the agency Commissioner to leaders of community-based organizations—to produce a framework that strengthens the impact of funding and TA across youth, workforce, and community development programs. Led TA to review the DYCD contract process for human services contracts to improve efficiency, ensuring nonprofit providers have contracts registered quickly and receive timely payment for program delivery. Consulted on the implementation of the Community Needs Assessment survey in 42 Neighborhood Development Areas across New York City.
- **NYS/NYC Professional Development & Resource Center (PDRC) for Religious and Independent Schools (Fordham University).** Leads evaluation services as the PDRC's evaluation partner, including development and analysis of an online survey administered following professional development opportunities; stakeholder interviews to provide formative feedback; and analyses of center engagement and satisfaction for grant reports to the NYS State Education Department.

Subject-Matter Expertise: Literacy and the Science of Reading

- **New York State Dyslexia & Dysgraphia Task Force (NYSED).** Directed the PSA team that managed, facilitated, and assembled data from a state-legislated 49-member task force comprising practitioners, district leaders, providers, advocates, and parents with expertise in dyslexia and dysgraphia. Co-authored the 2025 *New York State Dyslexia and Dysgraphia: Report and Recommendations* for NYSED delivery to the Governor and state legislative bodies.
- **Free Library of Philadelphia Literacy Enrichment Afterschool Program / LEAP (William Penn Foundation).** Directed a study of LEAP including development of a theory of change, identification of indicators of success, interviews and surveys, and analysis of administrative data collected by the City of Philadelphia. The study explored LEAP's role in the citywide out-of-school time system and in supporting the city's Read by 4th campaign.
- **Balanced Literacy program evaluation (Kauffman Foundation, Kansas City Missouri School District).** Contributed to the multi-year evaluation of the Balanced Literacy program in the Kansas City (Missouri) School District for the Kauffman Foundation, conducting analyses comparing instructional practices of elementary teachers in schools with high gains in literacy achievement to those of teachers in schools with low gains.

Mathematics Curriculum & Instruction

- **NYC Solves citywide math instructional redesign (NYC Public Schools).** Directed the formative evaluation of the pilot year of NYC Solves, a citywide math instructional redesign initiative. Delivered formative feedback on implementation strategies and support needs to inform continuous improvement, scale, and sustainability.

College & Career Readiness

- **NYC Public Schools Office of Student Pathways.** Directs evaluation of Pathways initiatives, including FutureReady NYC, Career Readiness and Modern Youth Apprenticeship, and the Pathways Advising Program. Designs evaluation strategies and collects qualitative and quantitative data from work-based learning partners and intermediaries (including CareerWise), higher education partners, school and district stakeholders, and students and families through surveys, focus groups, and interviews. Manages analysis of administrative data and program records to explore student engagement in pathways opportunities, coursework, and access. Manages

development of the Office of Student Pathways measurement strategy and framework to inform future strategy and assess short- and longer-term education and economic outcomes.

- **GEAR UP Grand Island Public Schools (Nebraska, U.S. Department of Education).** Directed evaluation of the seven-year federal GEAR UP grant. Supported Annual Performance Reporting (APR) requirements and generated formative feedback through data collection from students, families, school staff, and program staff to inform improvement of supports and services. Designed a quasi-experimental summative evaluation to assess impact on high school graduation, postsecondary enrollment, and postsecondary persistence, including analysis of National Student Clearinghouse data and student-level district data.

Financial Literacy

- **Personal Finance Education resources and guidance (NYSED).** Directs project to develop resources and guidance supporting district and school implementation of new Personal Finance Education requirements under the NY Inspires plan.

Student Attendance & Engagement

- **Partners for Rural Impact / PRI Full Service Community Schools (U.S. Department of Education).** Directs evaluations of seven federally-funded FSCS grants in rural East Kentucky, Missouri, and Texas. The evaluation supports measurement and reporting on grant objectives, pillars, and federal performance indicators; delivers formative feedback to grant leaders and school-based teams for continuous improvement; and generates field-building insights related to implementing, scaling, and sustaining FSCS in rural communities. Data collection includes needs assessment surveys, principal surveys, site visits and interviews, analysis of administrative data and state education data to assess academic impact, and use of ArcGIS and Census data to identify hot spots of student chronic absenteeism.
- **Summer Rising (NYC).** Directed multi-year evaluation of Summer Rising, a partnership between the City youth agency, NYCPS, and community-based organizations. The evaluation focused on delivering findings and recommendations to improve system infrastructure and capacity.
- **Post-program education and engagement of TASC participants (Mott Foundation).** Directed a study examining the effects of middle-grades afterschool program participation on students as they progressed into high school, measured by high school attendance rates, on-time accumulation of credits, and promotion compared to matched nonparticipants.

Youth & Adult Workforce Development

- **NYC youth workforce and employment initiatives (NYC Department of Youth and Community Development).** Led PSA's evaluations of workforce-focused initiatives supporting vulnerable youth and adults, including the Summer Youth Employment Program (SYEP), WIOA-funded Train & Earn, Anti-Gun Violence Employment program, Opportunity Youth, and Fatherhood program. Data collection included analysis of administrative data, document review, and interviews with government and nonprofit leaders as well as young people and families.
- **Center for After-School Excellence credential courses (TASC).** Directed an evaluation focused on the implementation of credential courses at City University of New York campuses to professionalize the afterschool workforce. The evaluation examined youth workers' satisfaction with educational opportunities, financial incentives, and social supports, and changes in instructional practices of program completers.
- **Afterschool leadership landscape (National Afterschool Association).** Authored a literature review on strengthening the afterschool leadership workforce that informed development and implementation of a professional learning community for emerging leaders, funded by the S.D. Bechtel, Jr. Foundation. Leading evaluation of a pilot of the Foundational Practices in Youth Development micro-credential for NAA, funded by the Wallace Foundation.
- **YMCA-USA Afterschool Upgrade (Y-USA).** Principal investigator for an evaluation of a national initiative to build the capacity of Y Associations to implement high-quality programming, exploring implementation of the Upgrade tools and approach across different business models to offer recommendations for strengthening the workforce.

Funding & Resource Allocation

- **United Way of the Greater Lehigh Valley performance management.** Managed development of a performance management strategy, working with United Way stakeholders and grantees to design a measurement framework that tracks the implementation of education investments and their impacts on indicators of community progress, including health, well-being, and educational performance.
- **DC Office of Out-of-School Time Grants and Youth Outcomes needs assessment.** Directed a needs assessment for the newly-formed office under the District of Columbia's Deputy Mayor for Education to collect family and youth insights about goals and priorities for an OST system. Partnered with a grassroots organization to implement a survey at community locations and in schools; briefed the OST Commission on findings and implications.

Methodological Expertise

- **Mixed-methods evaluation design.** Collaborative design of studies integrating quantitative and qualitative methods to deliver actionable feedback for continuous improvement, scale, and sustainability.
- **Performance management & measurement systems.** Design of dashboards, logic models, theories of change, measurement frameworks, indicators, rubrics, and data systems for public agencies and funders.
- **Quasi-experimental & longitudinal designs.** Summative impact evaluations using matched-comparison designs and longitudinal student-level data, including National Student Clearinghouse and district administrative data.
- **Survey & administrative data analysis.** Sample design, instrument development, and analysis of agency administrative records, program participation data, and community needs assessments.
- **Qualitative methods.** Site visits, interviews, focus groups, observations (including Dimensions of Success), and case studies.
- **Geospatial analysis.** Use of ArcGIS and Census data to identify community-level patterns such as chronic absenteeism hot spots in rural settings.
- **Facilitation & translation.** Facilitation of state task forces and cross-agency working groups; translation of complex findings into accessible reports, briefings, and tools for practitioner, policy, and funder audiences.

Employment History

Policy Studies Associates. Washington, DC — Co-Owner & Principal	2000–Present
Collaborative for Integrated School Services. Harvard University, Cambridge, MA Research Assistant	1999–2000
Stanford Center for Research in Disease Prevention. Palo Alto, CA Social Sciences Research Assistant	1996–1999

Education

Harvard Graduate School of Education — Ed.M., Administration, Planning, and Social Policy	2000
Stanford University — A.B., Human Biology; Certificate in Children and Society	1996

Selected Reports and Publications

Aladjem, D., Meredith, J., & Russell, C. (2026). Strategic Progress: Creating Opportunity and Building Capacity. Evaluation of PRI's Full Service Community Schools Grants in East Kentucky. Washington, DC: Policy Studies Associates.

Platt, A.L., & Russell, C.A. (2025). Rockcastle READY: Progress and Promise. Evaluation of the Perkins Innovation and Modernization Grant. Washington, DC: Policy Studies Associates.

Miller, K.F., Platt, A.L., Eyer, B.K., & Russell, C.A. (2025). Evaluation of FutureReady NYC: Lessons Learned from Five Schools. Washington, DC, Policy Studies Associates.

Woods, Y., Riley, D.L., Schultz, B., Gossett, A., Rubin, M., Miller, K., & Russell, C. (2024). New York State Dyslexia and Dysgraphia Task Force: Report and recommendations. NY: New York State Education Department.

- Riley, D., Russell, C.A., Loftis Hamm, P. & Lessard, A. (2023). Evaluation of the State Summer Learning Network (SSLN). Washington, DC: Policy Studies Associates.
- Fletcher, K.B., Bitzer, J.E., & Russell, C.A. (2023). Evaluation of Summer Together: Report on Summer 2022. Washington, DC: Policy Studies Associates.
- Fletcher, K., Loftis Hamm, P., & Russell, C.A. (2023). Evaluation of Summer Rising 2022. Washington, DC: Policy Studies Associates.
- Russell, C. & Fletcher, K. (2022). Evaluation of Summer Together: Summary of Findings. (February 2022). Washington, DC: Policy Studies Associates.
- Anderson, L., Lopez, A., Eyer, B., Russell, C. & Bitzer, J. (2022). Constituency Building in Environmental Education & Outdoor Programs: Strategy Review for the William Penn Foundation. Washington, DC: Policy Studies Associates.
- Meredith, J., Fletcher, K.B., Russell, C.A., Impact of Summer Together 2021: Findings from a Quasi-Experimental Study.
- Russell, C.A., & Newhouse, C.N. (Eds.) (2020). Measure, use, improve data use in out-of-school time. Charlotte, NC: Information Age Publishing.
- Russell, C.A., & Meredith, J. (2019). Literacy learning in drop-in library programs. Washington, DC: Policy Studies Associates.
- Russell, C.A. (2019). Innovate, iterate, improve: Strategies for developing 21st century competencies. New York: Asia Society.
- Russell, C.A., Turner, T.T., & Butler, A. (2018). Voices of DC parents and youth on OST. Washington, DC: Policy Studies Associates.
- Russell, C.A. (2018). The growth, evolution, and state of OST evaluation. In Malone, H.J., & Donahue, T. (Eds.), The growing out-of-school time field: Past, present, and future. Charlotte, NC: Information Age Publishing.
- Russell, C.A., & Francis, Y. (2018). Evaluation of the YMI Cornerstone Mentoring Program: Role in supporting engagement in school and learning. Washington, DC: Policy Studies Associates.
- Russell, C.A., Hildreth, J.L., & Stevens, P. (2016). ExpandED Schools National Demonstration: Lessons for scale and sustainability. Washington, DC: Policy Studies Associates.
- Reisner, E.R., Hewes, G.M., Russell, C.A., & Pechman, E.M. (2005). Evaluation of the Balanced Literacy program. Washington, DC: Policy Studies Associates.

A complete list of publications and conference presentations is available upon request.

YVONNE WOODS

Senior Research Associate | Policy Studies Associates, Inc.

Experienced evaluation and technical assistance leader with more than 15 years of experience conducting mixed-methods research and capacity-building TA for state education agencies, the U.S. Department of Education, foundations, and national organizations—including sustained, direct support to the Region 4 (Mid-Atlantic) Comprehensive Center serving Delaware, the District of Columbia, Maryland, New Jersey, and Pennsylvania. Senior Research Associate at Policy Studies Associates since 2008, she has provided TA to the District of Columbia Office of the State Superintendent of Education (OSSE) and the New Jersey Department of Education's Division of Early Childhood Services, leads a five-year federal Innovative Approaches to Literacy evaluation in rural Kentucky, and served on the New York State Dyslexia and Dysgraphia Task Force support team. Her work helps states and districts design and implement evidence-based policies and practices across literacy curriculum and the science of reading (including early childhood literacy), leader development, the educator workforce, college and career readiness, student attendance and engagement (including extensive out-of-school-time work), and federal and state funding and resource allocation. She works collaboratively with clients to minimize staff burden while maximizing the usefulness and quality of data.

Areas of Expertise

- **Capacity-building technical assistance to SEAs and education agencies.** Direct TA to state agencies—including OSSE-DC, NJ DOE Division of Early Childhood Services, and the NY State Education Department—on policy refinement, standards revision, graduate profile development, early childhood system alignment, and dyslexia/dysgraphia policy.
- **Literacy curriculum & the science of reading (including early childhood literacy).** Lead of a five-year U.S. DOE-funded Innovative Approaches to Literacy (IAL) evaluation in rural Kentucky; contributor to a second federal IAL evaluation supporting play-based early childhood literacy in DCPS; co-author of an NJ DOE evidence-based resource guide on the science of how children learn for Pre-K through 3rd grade system alignment; co-author of the NYSED Dyslexia and Dysgraphia Task Force final report.
- **Leader development.** Support to the Wallace Foundation's ESSA Leadership Learning Community (ELLC) and the DCPS Assistant Principal Summit; co-development of a career lattice guide for LEAs; team analyst scoring School Improvement Plans for the University of Maryland School Improvement Leadership Academy; data lead on Project I4 at East Carolina University (instructional leadership for principals).
- **Educator workforce development.** Lead author and senior team member on multi-state Hope Street Group State Teacher Fellows evaluations (including Tennessee Year One); evaluation of the Delaware Reading and Writing professional learning program and the Comprehensive New Teacher Induction coaching program.
- **College & career readiness.** Five-year evaluation of Digital Promise's community college CTE global learning competencies pilot; white paper on global education in community college CTE programs for the Asia Society; classroom observations and stakeholder interviews for the multi-year College Summit evaluation; College-Community Connections sustainability study for the Teagle Foundation.
- **Student attendance & engagement (out-of-school time).** New Hampshire DOE 21st Century Community Learning Center performance-management strategy; Summer Rising and Summer Youth Employment Program evaluations in NYC; Trenton Afterschool Partnership for NJ After 3; three-year deputy director of the YouthQuest evaluation (Mott Foundation, Flint, MI); Citizen Schools Extended Learning Time Initiative in Boston.
- **Federal & state funding and resource allocation.** Evaluation of NYC DYCD's federally-funded Workforce Innovation and Opportunity Act (WIOA) programs with labor market analysis; co-developer of School Improvement Grant (SIG) strategy profiles for the U.S. DOE; contributor to ARRA federal-dollars project at the Center on Education Policy.
- **Early childhood systems alignment.** Lead author of the Baltimore City Early Childhood Advisory Council early childhood systems report (2022); evaluator of the NGA Center's Comprehensive Strategy for Early Care and

Education Project; Pre-K Expansion survey of Baltimore City childcare providers for the Maryland Fund for Educational Excellence informing Blueprint Pillar 1 implementation.

Selected Project Experience

Building SEA and LEA Capacity Through Technical Assistance, Policy Analysis, and Facilitation

- **Region 4 (Mid-Atlantic) Comprehensive Center — OSSE (U.S. Department of Education).** Provided technical assistance and support to the District of Columbia Office of the State Superintendent of Education on revising social studies standards, refining policies to support LEA capacity to deliver special education services and school improvement services, developing a districtwide Graduate Profile, and revising graduation requirements. Led meetings with OSSE project leads; managed day-to-day project activities and administrative reporting; conducted ongoing research, landscape scanning, and policy analysis; developed and finalized all project deliverables including reports, briefs, and presentations; co-facilitated listening sessions with local stakeholders in DC; delivered presentations to OSSE leadership teams; and assisted OSSE project leads with preparation for public meetings and cross-agency meetings.
- **Region 4 (Mid-Atlantic) Comprehensive Center — NJ DOE Early Childhood Services.** Provided technical assistance to the New Jersey Department of Education, Division of Early Childhood Services, including co-developing an evidence-based resource guide on the science of how children learn to inform Pre-K through 3rd grade system alignment, instruction, and assessment; developing supplemental materials for policymakers, administrators, teachers, pre-service providers, and parents; and co-facilitating two workshops for P–3 administrators and educators.
- **Region 4 (Mid-Atlantic) Comprehensive Center — multi-state landscape scans.** Conducted landscape scans and research to inform policymakers in the five Mid-Atlantic states served by the Center. Co-facilitated listening sessions, supported preparation for public meetings and hearings, and delivered presentations to agency leaders.
- **NYSED Dyslexia and Dysgraphia Task Force.** Member of the team providing technical assistance and support to the state-legislated 49-member Task Force charged with developing recommendations and a report to the New York State Governor, Commissioner of Education, President of the Senate, and Speaker of the Assembly. Duties included policy analysis, subcommittee discussion facilitation, committee meeting organizing and planning, developing and synthesizing Task Force recommendations, and report writing. Lead author of the final report.
- **Baltimore City Early Childhood Advisory Council early childhood systems report.** Lead author of the early childhood systems report (2022) consisting of a citywide landscape scan of early childhood services, a literature scan, and provider interviews. The report captured a comprehensive overview of the strengths and gaps in the systems delivering services to children and their families from prenatal to Kindergarten, and policy recommendations to improve alignment and coordination. Study included focus groups with caregivers carried out in partnership with a Baltimore-based consultant.

Subject-Matter Expertise: Literacy and the Science of Reading (Including Early Childhood Literacy)

- **Partners for Rural Impact Innovative Approaches to Literacy / IAL — Knott County, KY (U.S. Department of Education).** Leads a five-year evaluation of PRI's Knott County IAL grant funded by the U.S. Department of Education, and coordinates evaluation activities for one of PRI's Full-Service Community Schools (FSCS) grants in Breathitt and Knott Counties. The Knott County IAL grant support of district literacy efforts has contributed to measurable gains on the state reading assessment across multiple grade levels.
- **Reading Is Fundamental Innovative Approaches to Literacy / Read for Success Early Childhood (DCPS).** Contributing member of a five-year IAL evaluation for Reading Is Fundamental that assesses implementation and impact of RIF's Read for Success Early Childhood program pilot, providing play-based literacy resources and supports to preschool children in DC Public Schools.
- **NJ DOE Pre-K–3 "Science of How Children Learn" resource guide.** Co-developed an evidence-based resource guide for the NJ DOE Division of Early Childhood Services on the science of how children learn to inform Pre-K through 3rd grade system alignment, instruction, and assessment. Developed supplemental materials and co-facilitated workshops for administrators and educators.
- **Delaware Reading and Writing Project (Delaware Academy for School Leadership, University of Delaware, and Delaware Department of Education).** Senior team member on the evaluation of the state's Reading and Writing

professional learning program for teachers. Duties included developing interview guides; interviewing teachers, coaches, and program staff; analyzing participation and teacher evaluation data; and report writing. Co-authored *Evaluation of the DDOE and University of Delaware Reading and Writing Project*.

Leader Development

- **DCPS Assistant Principal Summit and career lattice (DCPS, OSSE, The Wallace Foundation).** Contributed to technical assistance for OSSE and DC Public Schools, supporting implementation of the first-ever leadership development Assistant Principal Summit for all DCPS assistant principals and contributing to the development of a career lattice guide for LEAs in the District of Columbia. The guide provides research-based strategies to develop and support career pathways for teachers.
- **ESSA Leadership Learning Community / ELLC and ARP PLCs (The Wallace Foundation).** Supported the Wallace Foundation's ELLC and American Rescue Plan professional learning communities (PLCs) projects by documenting convenings and meetings and contributing to evaluation of the ELLC. The ELLC supported states and districts in focusing on school leadership and school improvement in the development of their ESSA plans; the ARP PLCs were monthly convenings of district leaders to exchange ideas and strategies on COVID-19 recovery and the planning and spending of ARP funds.
- **University of Maryland School Improvement Leadership Academy.** Contributed to the evaluation of this two-year, SEED-funded leadership academy for sitting and aspiring school leaders and co-authored its December 2025 final report (Anderson, Woods, & Hildreth). As SIP Scoring Lead, led and supervised an eight-person team that scored 54 school improvement plans (SIPs) from leaders of high-need, predominantly Title I schools in Maryland and one New Jersey district against the University of Virginia/WestEd 12-domain Rubric for Assessing Schools' Plans for Rapid Improvement—designing and executing the scorer calibration process, measuring interrater reliability (Kendall's W), and conducting collaborative consensus scoring on every plan. Coordinated generation of a structured scoring report for each plan; the resulting feedback was associated with measurable gains in plan quality. Among the 34 participants who completed the program and had matched pre- and post-academy plans, average SIP scores rose 4.5 points (Cohort 1) and 12.7 points (Cohort 2) out of 48 within a single year.
- **Project i4 at East Carolina University (U.S. Department of Education).** Contributed to the evaluation of Project i4, which aimed to develop instructional leadership practices through an intensive coaching and mentoring program for principals grounded in adult learning principles. Managed data collection of coach and participant interviews, focus groups, and surveys; contributed to interview and survey development; and coded, analyzed, and scored qualitative data from program participants.

Educator Workforce Development

- **Hope Street Group State Teacher Fellows programs — multi-state evaluation.** Senior team member on the evaluation of the State Teacher Fellowship program, focusing on the development and evolution of the program and the impact on teacher participants and state policymaking. Lead author of *Final Report of the Evaluation of the Tennessee State Teacher Fellows Program, Year One* (2016); co-author of the multi-state synthesis and adaptation-to-policy-contexts reports (2016, 2017, 2018).
- **Delaware Comprehensive New Teacher Induction Program (Delaware Academy for School Leadership, University of Delaware, and Delaware Department of Education).** Senior team member on the evaluation of the state's Comprehensive New Teacher Induction coaching program for first-year teachers. Co-authored *Evaluation of the University of Delaware New Teacher Induction Program*.

College & Career Readiness

- **Digital Promise CTE community college global learning competencies.** Evaluates curricula, resources, and training for community college career and technical education (CTE) faculty to integrate global learning competencies into the classroom. The five-year evaluation includes formative and summative findings informing pilot implementation, continuous improvement, and outcomes, using surveys, interviews, and focus groups with participants, community college administrators, and students.
- **Asia Society — Global Education in Community College CTE Programs.** Conducted a literature scan and faculty interviews to develop the Asia Society white paper *Preparing Tomorrow's Workforce: The Global Learning*

Imperative for Career and Technical Education Programs at Community and Technical Colleges, with case studies of promising practices.

- **College Summit national evaluation.** Contributed to the team that conducted a multi-year evaluation of the implementation and outcomes of the College Summit program, with classroom observations and interviews of high school administrators, teachers, and students.
- **Teagle Foundation College-Community Connections Program.** Contributed to a qualitative evaluation examining sustainability and replication of programs that prepare high school students for the transition to college, including interviews with college and community-based organization partners.

Student Attendance & Engagement (Out-of-School Time)

- **New Hampshire DOE 21st Century Community Learning Center performance management.** Co-led the design and launch of an ongoing performance-management and evaluation strategy for NHDOE's 21st CCLC program. Collaborated with NHDOE and stakeholders to build a strategy and system NHDOE could administer independently. Data collection included surveys of program directors and coordinators, principals, and students, plus NHDOE-maintained student performance, enrollment, and participation data.
- **Summer Rising and Summer Youth Employment Program (NYC DYCD).** Contributed to evaluation of the citywide Summer Rising initiative (a partnership of the NYC Department of Education and DYCD) and to evaluation of the DYCD Summer Youth Employment Program (SYEP).
- **Summer Together (San Francisco Department of Children, Youth & Their Families).** Contributed to the evaluation of Summer Together, including provider focus groups, survey and focus group protocol development, survey analysis, and reporting. Also conducted a literature scan and provider interviews to develop two research briefs for DCYF Education Supports Service Area on remote learning strategies and engagement of disconnected youth in remote learning.
- **YouthQuest — three-year evaluation (Mott Foundation, Flint, MI).** Served as deputy director of a three-year longitudinal evaluation examining program implementation and impact of the YouthQuest afterschool program. Coordinated a team of six researchers to conduct site visits, interviews, and structured observations at 10 afterschool programs; administered surveys to youth participants and staff; and contributed to propensity score matching of students to compare test score data of participants with matched non-participants and to longitudinal analysis of youth and staff survey data.
- **New Jersey After 3 — Trenton Afterschool Partnership.** Led research activities for a small-scale evaluation of the Trenton Afterschool Partnership including developing youth and parent surveys, managing data collection activities, analysis, and reporting. Study included program participation and demographic data from a citywide program database.
- **Citizen Schools Extended Learning Time Initiative (Boston, MA).** Led a small-scale study analyzing the Extended Learning Time Initiative in Boston and the role of the Citizen Schools' program in the initiative, including interviews with school principals and program staff and analysis of state test score data.

Federal & State Funding and Resource Allocation

- **NYC DYCD Workforce Innovation and Opportunity Act / WIOA.** Led evaluation of NYC DYCD's federally-funded WIOA programs, including surveys and focus groups with providers and participants and a labor market analysis to inform policies and practices supporting youth labor development programming across the city.
- **School Improvement Grant strategy profiles (U.S. Department of Education).** Member of the team developing profiles on schools, districts, and states that received School Improvement Grant funding, with each profile focused on a specific strategy used to improve student learning opportunities and outcomes.
- **ARRA federal-dollars project (Center on Education Policy).** Contributed to a project examining how states and districts responded to the influx of federal dollars from the American Recovery and Reinvestment Act of 2009. Responsibilities included data collection for the LEA district survey, analysis, and creation of analytic graphics for the report.
- **Maryland Pre-K Expansion / Blueprint Pillar 1 survey (Maryland Fund for Educational Excellence).** Led the design, administration, analysis, and reporting on a survey of childcare providers in Baltimore City designed to understand perceptions, barriers, and concerns regarding the state's plans for Pre-K Expansion as outlined in Pillar 1 of The Blueprint for Maryland's Future.

Methodological Expertise

- **Mixed-methods evaluation design.** Design and management of mixed-methods evaluations that minimize organizational burden while maximizing the usefulness and quality of data; particularly survey research, interviews, focus groups, and observation.
- **Qualitative research & analysis.** Interviews and focus groups eliciting honest feedback including on sensitive topics; qualitative coding and analysis including with ATLAS.ti qualitative analysis software.
- **Survey design & administration.** Design and administration of multi-stakeholder surveys with processes to encourage high response rates.
- **Quasi-experimental analysis.** Propensity score matching for program impact analysis (YouthQuest).
- **Policy analysis & landscape scanning.** Policy analysis, research scans, and landscape scans to inform state and local policymakers.
- **Facilitation of task forces & convenings.** Facilitation of subcommittee discussions, listening sessions, and state-legislated task forces.
- **Translation & dissemination.** Production of clear, accessible reports with practical recommendations tailored to a variety of stakeholder audiences.

Employment History

Policy Studies Associates. Washington, DC — Senior Research Associate	2008–Present
Afterschool Alliance. Washington, DC — Research Associate	2006–2008
University of Illinois at Urbana-Champaign. Champaign, IL — Research and Graduate Assistant	2004–2006

Education

University of Illinois at Urbana-Champaign, College of Education — Ed.M., Educational Policy Studies	2006
Yale University — B.A., History	2003

Selected Reports and Publications

- Anderson, L.M., Woods, Y., & Hildreth, J. (2025). Evaluation of the SEED-Funded School Improvement Leadership Academy (SILA) at the University of Maryland's Center for Educational Innovation and Improvement (CEii): Final Report. Washington, DC: Policy Studies Associates.
- Woods, Y., Riley, D.L., Schultz, B., Gossett, A., Rubin, M., Miller, K., & Russell, C. (2024). New York State Dyslexia and Dysgraphia Task Force: Report and recommendations. NY: New York State Education Department.
- Woods, Y., Johnson, N., Thiesse, L., Kidd, S., & Hildreth, J. (2022). Baltimore City early childhood systems report. Washington, DC: Policy Studies Associates.
- Woods, Y. (2020). Preparing tomorrow's workforce: The global learning imperative for career and technical education programs at community and technical colleges. New York, NY: Center for Global Education at Asia Society and Longview Foundation.
- Woods, Y. (2020). Promising practices and strategies in remote learning: Lessons from the field. Washington, DC: Policy Studies Associates.
- Meredith, J., Aladjem, D.K., & Woods, Y. (2018). Hope Street Group State Teacher Fellows Programs: Adapting to dynamic policy contexts. Washington, DC: Policy Studies Associates.
- Aladjem, D.K., Meredith, J., & Woods, Y. (2017). Hope Street Group State Teacher Fellowship evaluation: Building sustainable impact. Washington, DC: Policy Studies Associates.
- Woods, Y., Hildreth, J., & MacFarlane, J. (2017). Evaluation of the University of Delaware New Teacher Induction Program. Washington, DC: Policy Studies Associates.
- MacFarlane, J., Woods, Y., & Hildreth, J. (2017). Evaluation of the DDOE and University of Delaware Reading and Writing Project. Washington, DC: Policy Studies Associates.

Woods, Y., Anderson, L.M., & Riley, D. (2017). Evaluation of the NGA Center's Comprehensive Strategy Project — Interim Report. Washington, DC: Policy Studies Associates.

Aladjem, D.K., Woods, Y., & Meredith, J. (2016). Hope Street Group State Teacher Fellows Programs: Synthesis of state evaluations. Washington, DC: Policy Studies Associates.

Woods, Y., Aladjem, D., & MacFarlane, J. (2016). Final report of the evaluation of the Tennessee State Teacher Fellows Program, Year One. Washington, DC: Policy Studies Associates.

Woods, Y., Russell, C.A., Palmiter, A., & Turner, T. (2016). Formative evaluation of the Y-USA Afterschool Upgrade pilot program. Washington, DC: Policy Studies Associates.

Russell, C.A., & Woods, Y. (2012). Evaluation of the New Hampshire 21st Century Community Learning Centers: Findings from the 2011-12 school year. Washington, DC: Policy Studies Associates.

Woods, Y., Sanzone, J., Miller, T., & Reisner, E. (2010). Evaluation of New Jersey After 3 Trenton Afterschool Partnership Programs. Washington, DC: Policy Studies Associates.

A complete list of publications and conference presentations is available upon request.

Katrina Laguarda

Senior Principal Education Researcher and Program Area Lead, Teaching Quality and Systems Reform

Summary

Katrina Laguarda, MEd, collaborates with education leaders to leverage research evidence to improve instruction and teacher development in K–12 schools. She leads three projects for the Regional Educational Laboratory Appalachia (REL AP) and brings more than two decades of experience collaborating with education leaders to design and execute rigorous program evaluations, including development of logic models, implementation measures, and implementation studies to provide formative feedback to strengthen program designs. Laguarda is director or co-director of seven current or recently concluded federally funded evaluations of instructional coaching and teacher development. For each, she collaborates with program leaders to specify the intervention’s key components and measures of implementation fidelity, coaching and teacher practice outcomes, and scaling strategies in diverse district contexts, including rural communities. Laguarda also recently led the development and validation of toolkit to assess the quality and effectiveness of instructional teams as they engage in data analysis to support improvements in instructional practice.

Relevant Experience

- Collaborates with stakeholders and research partners in the REL AP region on research and technical assistance projects.
- Demonstrates success leading sustainable research partnerships.
- Leads rigorous evaluations of federally funded projects requiring logic model development, fidelity monitoring, performance measurement, and development of reliable and valid short- and medium-term outcome measures.
- Specializes in research related to teacher development and instructional leadership.

Academic Background

- EdM, administration, planning, and social policy, 1992, Harvard University
- AB, social studies (magna cum laude, Phi Beta Kappa), 1987, Harvard University

Representative Research Assignments at SRI (since 2015)

Partnership Lead, Project Lead, Task Lead, and Senior Adviser, Regional Educational Laboratory Appalachia (REL AP), 2022–present. Contract with the Institute of Education Sciences, U.S. Department of Education. As Task 3 lead (2022–23) and Senior Adviser, supports REL AP teams to design projects in partnership with state and local education leaders, set long-term goals for student learning, track progress toward short-term and medium-term outcomes, monitor partnership health, and make mid-course corrections to address barriers to progress. As the Professional Learning for Mathematics Educators and Coaches partnership lead, coaches Kentucky Department of Education partners to design and implement an evaluation of the state’s Mathematics Achievement Fund, including development of an observation rubric to assess the quality of instructional coaching interactions with mathematics teachers. Leads a project with the West Virginia Department of Education and West Virginia University to design a public-facing dashboard integrating diverse federal data sets (American Community Survey, U.S. Department of Agriculture’s Food Access Research Atlas) and geospatial analysis to explore the factors influencing teacher recruitment and retention in the state’s most rural and isolated schools. Leads a

project with a consortium of districts in northeastern Tennessee to develop an evaluation framework for two locally developed career pathways programs.

Partnership Lead and Adviser, Cross-State Partnership on Using Data and Evidence to Facilitate Action, REL AP, 2017–21. Led formation of a REL AP partnership of state education agency staff across four states to develop local capacity to use state data in continuous improvement and strategic planning. Partnership formation included development of a partnership logic model. In West Virginia, supported a state-level team to develop tools to track local implementation of evidence-based trauma-informed care interventions and related student outcomes, along with plans for pilot testing and full implementation.

Director, The Oaks Academy Research-Practice Partnership (Lilly Endowment Marion County K–12 Private Schools Initiative), 2026–present. The Oaks Academy is a private school network serving 1,100 K–8 students in three low-income neighborhoods in central Indianapolis. As The Oaks research and data partner, builds school leaders’ capacity to monitor implementation of significant new grant-funded programming, designs and carries out annual rapid-cycle impact evaluations, and estimates return on investment.

Principal Investigator, Developing and Validating a Practitioner Toolkit to Scale and Sustain Collaborative Data Inquiry (Institute of Education Sciences, U.S. Department of Education), 2023–26. Led development and validation of a suite of instruments (observation rubric, participant surveys, score report, reflection guide) designed to assess the quality and effectiveness of instructional teams as they engage in data analysis to support improvements in instructional practice. The toolkit is designed to help school and district leaders sustain and scale investments in training for data-driven instructional improvement.

Principal Investigator, Implementation Evaluation of CoolThink (Hong Kong Jockey Club Charities Trust), 2020–26. Directed an evaluation of the implementation and scaling of the CoolThink computational thinking curriculum in more than 600 classrooms in 168 primary schools in Hong Kong. Led the design, analysis, and reporting of implementation studies at the classroom, school, and system levels.

Director, evaluations of Transcend’s Whole Child Model (WCM), under two U.S. Department of Education, Education Innovation and Research (EIR) Early-phase and Mid-phase grants, 2020–present. Directs quasi-experimental studies of WCM’s impacts on student and teacher well-being, student achievement, and student attendance and behavioral outcomes in diverse rural and urban district contexts. Directs mixed-methods implementation studies including the development of logic models, implementation fidelity metrics, measures of the adoption of WCM practices, and qualitative data collection to explore the facilitators and barriers to WCM implementation.

Director, evaluations of instructional coaching interventions developed by the New Teacher Center (NTC), under U.S. Department of Education Investing in Innovation (i3), EIR, and Supporting Effective Educator Development (SEED) grants, 2016–26. Directed multiple randomized controlled trials of NTC coaching interventions employing mixed methods to evaluate coaching models for different teacher populations under a variety of rural and urban district contexts. Led implementation studies including the development of logic models; measures for annual performance reporting, implementation fidelity, engagement in coaching (both dosage and type), and coaching quality; and qualitative case studies to explore the school- and district-level conditions under which instructional coaching is most effective. Collaborated with quantitative leads to evaluate impacts on teacher practice, teacher retention, student achievement, and scaling strategies that provide districts greater flexibility

in delivering program services. Evaluations of NTC coaching and induction models included Social-Emotional Learning (SEL)-Focused Instructional Coaching (EIR Mid-phase), 2021–26; Scaling Up Instructional Coaching in Urban and Rural Contexts (EIR Expansion), 2019–26; Scaling of NTC’s Beginning Teacher Induction Model (i3 Scale-up), 2016–20; and Instructional Coaching for Academic Success (SEED), 2016–19.

Co-Director, subcontract to New Leaders, Evaluation of the Emerging Leaders Program (U.S. Department of Education, SEED), 2016–19. The Emerging Leaders program trains assistant principals, instructional coaches, and lead teachers to lead school teams in data-driven continuous improvement cycles to achieve student learning goals. Co-directed a randomized controlled trial of the program’s impact on participants’ leadership skills, instructional practice, and student achievement. Led the design, analysis, and reporting of qualitative case study results to explain variations in program implementation and impacts.

Deputy Project Director, Study of State Prohibitions on Aiding and Abetting Sexual Misconduct in Schools (U.S. Department of Education, Office of Elementary and Secondary Education), 2019–22. Reviewed laws, regulations, and policies in the 50 states, drawing on extant documents and interviews with state agency staff.

Other Professional Experience

Independent Research Consultant (2008–15)

Expert Panel Member, School Improvement, National Evaluation of the Comprehensive Technical Assistance Centers and National Evaluation of the Regional Educational Laboratories (contracts with Decision Information Resources and Westat), 2008–09. Reviewed and scored comprehensive center and regional educational laboratory products focused on building state, district, and local capacity to support school improvement.

Policy Studies Associates (1992–2008)

Subcontract Director, Evaluation of Title I Accountability Systems and School Improvement Efforts (U.S. Department of Education, Policy and Program Studies Service [PPSS], subcontract to SRI), 2000–06. Led the design, administration, and analysis of a longitudinal survey of Title I directors in a national, stratified random sample of 1,300 districts, and interviews on statewide systems of school support. The evaluation tracked state and district implementation of the school improvement provisions of the No Child Left Behind Act from 2001 to 2004.

Director, Study of State-Sponsored Technical Assistance to Low-Performing Schools (U.S. Department of Education, PPSS), 2002–03. Directed case studies of technical assistance in nine states, drawing on interviews with state and district administrators and technical assistance providers.

Director, National Evaluation of the Comprehensive Regional Assistance Centers Program (U.S. Department of Education, PPSS), 1998–2000. Designed and directed the first national evaluation of the Comprehensive Center program including three nationally representative surveys of center customers and potential customers and 15 case studies of center services to states and districts, including services to support school improvement.

Selected Publications, Presentations, and Commentary

Laguarda, K., Jennerjohn, A., Wang, H., Kelley-Kemple, T. & Klute, M. (2026). *Advancing social and emotional learning integrated with rigorous content through a whole-school learning model: Evaluation of the New Teacher Center EIR grant*. SRI.

- Laguarda, K., & Bocala, C. (2026). *Developing and validating a practitioner toolkit to support collaborative data inquiry* [Paper presentation]. American Educational Research Association, Los Angeles, CA, United States.
- Cassidy, L., Wang, H., Rush, J., & Laguarda, K. (2026). *Scaling up instructional coaching in rural and urban settings: Evaluation of New Teacher Center's EIR Expansion grant*. SRI.
- Burkander, P., Laguarda, K., Schellenberger, K., Capan, S., Brown, L., & Bocala, C. (2026). *Collaborative Data Inquiry Practitioner Toolkit validation study*. SRI.
- Brown, L., Laguarda, K., Capan, S., Bocala, C., & Burkander, P. (2026). *Collaborative Data Inquiry Practitioner Toolkit*. SRI.
- Laguarda, K., Basu, S., Joshi, E., Lundh, P., Ouyang, S., Shear, L., & Yang, H. (2025). *Scaling up CoolThink@JC: Implementation study endline report*. SRI International.
- Cassidy, L., & Laguarda, K. (2024). *Leveraging a decade of research. Designing instructional coaching for optimal learning* [White paper]. New Teacher Center.
https://ntc.widen.net/s/xqtslsqcpv/designing-instructional-coaching-for-optimal-learning_fullrpt_final_2.12.2024
- Laguarda, K., Wang, H., & Shear, L. (2024). *Where are CoolThink students making the greatest learning gains? Linking CoolThink@JC implementation with student outcomes*. SRI.
- Wilkerson, S. B., Laguarda, K., Reagan, J., & Chavez, E. (2023, October 28–31). *Opening the Black Box of Instructional Coaching: Measuring the Quality of Mathematics Coaching Conversations for Continuous Improvement and Program Evaluation* [Paper presentation]. 55th NCSM Annual Conference, Washington, DC, United States.
- Laguarda, K., Shear, L., Basu, S., Joshi, E., Lundh, P., & Yang, H. (2023). *Scaling up CoolThink@JC: Implementation study midline report*. SRI International.
- Anderson, L. M., Spector, J., Riley, D., Kidd, S., Wilkerson, S. B., Cosby, A. C., & Laguarda, K. (2022). *Study of state policies to prohibit aiding and abetting sexual misconduct in schools*. U.S. Department of Education, Office Elementary and Secondary Education.
<https://oese.ed.gov/files/2022/06/Study-of-State-Policies-to-Prohibit-Aiding-and-Abetting-Sexual-Misconduct-in-Schools.pdf>
- Laguarda, K., Shear, L., Yang, H., Fields, X., & Basu, S. (2022). *Global benchmarking of computational thinking education in primary schools*. SRI International.
<https://www.sri.com/publication/global-benchmarking-of-computational-thinking-education-in-primary-schools/>
- Alozie, N., Lundh, P., Laguarda, K., Parker, C., Fujii, R., & McBride, E. (2021). *Designing for Diversity Part 1: Where is equity and inclusion in curriculum design* [White paper]. The National Comprehension Center at Westat.
- Arshan, N., Laguarda, K., Boyce, J., Beesley, A., Goetz, R., Wei, X., & Levin-Guracar, E. (2020, March 11–14). *Emerging Leaders Program: Impacts on students, teachers, and leaders in three sites* [Selected for presentation during the keynote address]. Society for Research on Educational Effectiveness Spring Conference, virtual.
- Laguarda, K., Cassidy, L., Wang, H., & Goetz, R. (2020). *New Teacher Center instructional coaching for academic success: Implementation and impacts on teachers and students*. SRI International.
- Schmidt, R. A., Pilchen, A. R., Laguarda, K., Wang, H., & Patel, D. (2020). *Scaling up teacher induction: Implementation and impact on teachers and students* [Evaluation of the New Teacher Center's i3 Scale-up grant, final report]. SRI International.

<https://www.sri.com/publication/scaling-up-teacher-induction-implementation-and-impact-on-teachers-and-students/>

- Shear, L., Wang, H., Tate, C., Basu, S., & Laguarda, K. (2020). *CoolThink@JC pilot evaluation: Endline report*. SRI International.
- Arshan, N. L., Laguarda, K. G., Boyce, J., Beesley, A., Goetz, R., Wei, X., & Levin-Guracar, E. (2019). *Emerging Leaders Program: Impacts on students, teachers, and leaders in three sites*. SRI International.
- Patel, D., Wei, X., Laguarda, K., Stites, R., Cheever, H., & Goetz, R. (2018). *Evaluation of Education Connections: Supporting teachers with standards-based instruction for English learners in mainstream classrooms*. SRI Education.
- Schmidt, R., Young, V., Cassidy, L., Wang, H., & Laguarda, K. (2017). *Impact of the New Teacher Center's New Teacher Induction Model on teachers and students*. SRI International.
- Young, V. M., Schmidt, R., Wang, H., Cassidy, L., & Laguarda, K. (2017). *A comprehensive model of teacher induction: Implementation and impact on teachers and students. Evaluation of the New Teacher Center's i3 Validation grant, final report*. SRI International.
- <https://www.sri.com/publication/a-comprehensive-model-of-teacher-induction-implementation-and-impact-on-teachers-and-students-evaluation-of-the-new-teacher-centers-i3-validation-grant-final-report/>
- Laguarda, K. G. (2009). Lessons learned from evaluation. In B. B. Berns & J. O. Sandler (Eds.), *Making science curriculum matter: Wisdom for the reform road ahead* (pp. 61–74). Corwin Press.
- Laguarda, K. G. (2006). *District assistance to low-performing schools in an era of increasing accountability* [Paper presentation]. Annual Meeting of the American Educational Research Association, San Francisco, CA, United States.
- Anderson, L. M., & Laguarda, K. G. (2005). *Case studies of supplemental services under the No Child Left Behind Act: Findings from 2003-04*. Planning and Program Studies Service, U.S. Department of Education.
- Padilla, C., Skolnik, H., Lopez-Torkos, A., Woodworth, K., Lash, A., Shields, P. M., Laguarda, K. G., & David, J. L. (2005). *Title I Accountability and School Improvement from 2001 to 2004*. Planning and Program Studies Service, U.S. Department of Education.
- Padilla, C., Woodworth, K., Lash, A., Shields, P. M., & Laguarda, K. G. (2005). *Evaluation of Title I accountability systems and school improvement efforts: Findings from 2002–03*. U.S. Department of Education.
- Laguarda, K. G. (2003). *State-sponsored technical assistance to low-performing schools: Strategies from nine states* [Paper presentation]. American Educational Research Association, Chicago, IL, United States.
- Laguarda, K. G., Hildreth, J. L., Kelliher, C. T., Riley, D. L., Walking Eagle, K. P., & Pechman, E. (2000). *Comprehensive Regional Assistance Centers Program: Final report on the evaluation*. U.S. Department of Education.

Professional Certifications and Associations

Director and Executive Committee Member, Knowledge Alliance
Member, American Educational Research Association

Paul Burkander

Senior Education Researcher

Summary

Paul Burkander, PhD, has deep expertise in state-of-the-art quantitative designs, including causal and quasi-experimental designs, and in statistical analysis, coupled with skills in translating sophisticated scientific methods for lay audiences. He leads research-based technical assistance, implementation and outcome studies, and applied research projects in partnership with local and state educators and for a variety of federal, local, philanthropic, and commercial clients. He also applies his subject matter expertise in digital and machine learning, teacher quality and workforce, and student mental health. Burkander manages teams and partners with technical working groups to produce peer-reviewed technical reports, tools, professional development modules, and publications on time, within budget, and to high research standards.

Representative Research Assignments at SRI (since 2022)

Project Lead, Predicting Effects of SNAP and Medicaid Work Requirements on Federal Funding to Districts, 2026–present. Funded by the Institute of Education Studies (IES) under the Regional Educational Laboratory Appalachia (REL AP) contract. Leads a training, coaching, and technical support (TCTS) project to enhance the capacity of West Virginia Department of Education (WVDE) staff to leverage publicly available census data and readily available administrative WVDE data to predict district-level changes in National School Lunch Program fundings due to changes in SNAP and Medicaid eligibility.

Project Lead, Data-Informed Decisionmaking to Improve Dual Enrollment, 2026–present. Funded by IES under the REL AP contract. Leads a TCTS project to increase the capacity of Virginia Community College System staff to leverage administrative data for informing and improving dual enrollment policies and practices.

Task Lead, Ask an Expert, 2025–26. Funded by IES under the REL AP contract. Led the Ask an Expert task to provide research-based responses to stakeholders' education questions. In the most recent request, provided technical support to Kentucky Department of Education staff by developing an analysis plan, Excel review tool, and stratified random sample for a review of documentary evidence submitted by all Kentucky districts.

Quantitative Task Lead, iCoachTeam, 2023–present. Funded by a U.S. Department of Education, Education Innovation and Research (EIR) Early-phase grant. Leads quantitative analyses of

Relevant Experience

- Extensive prior REL experience, including as lead REL peer reviewer, Ask an Expert task lead, and project lead on applied research and TCTS projects.
- Conducts systematic evidence reviews for WWC contracts, applying certifications in WWC group design, single-case design, and advanced design standards, version 5.0.
- Leads complex multiyear tasks and projects within and across states and in partnership with state and local practitioners.

Certifications and trainings

- WWC reviewer, group design and advanced group design standards, v. 5.0
- Completed IES-funded training on Bayesian Longitudinal Data Modeling, 2025
- Completed SREE workshop on cost analyses, 2020

Academic Background

- PhD, economics, 2014, Michigan State University
- MA, economics, 2011, Michigan State University
- BS, economics, mathematics, *summa cum laude*, 2009, Eastern Michigan University

implementation and outcome data to inform continuous improvement and estimate the effectiveness of this program designed to improve math teachers' use of technology.

Quantitative Task Lead, Postsecondary Teaching with Technology Collaborative, 2022–present.

Funded by IES. Leads an impact analysis to inform continuous program improvement, a cost analysis, and data management of cost survey data, administrative data, micro-level data from learning management systems, and faculty and student survey data.

Project Director, Uses of Federal Education Funds Study, 2023–25. Funded by IES. Led a multifaceted team to validate fiscal and personnel data collected from a nationally representative sample of districts. Led interviews with a nationally representative sample of school districts to better understand their fiscal and personnel data. Produced a restricted-use file and lessons learned memo to improve future collection and analysis of fiscal and personnel data.

Other Professional Experience

McREL International, 2021–22

Project Lead, Evaluation of Teacher Mobility to Inform Retention and Recruitment Policies in Palau, funded by IES under the REL Pacific contract, 2021–22. Led a descriptive study examining characteristics of the current Palauan teacher workforce as well as historic patterns of teacher mobility and retention.

Task Lead, Classroom Instruction That Works, 2021. Led systematic review of evidence, applying What Works Clearinghouse (WWC) group design standards (v. 4.1); trained junior McREL staff in evidence reviews; and developed systems of tracking review results to inform synthesis of evidence of strategies for improving student achievement.

Project Director, Evaluation of Pioneer Valley Books' Digital Reader and Literacy Footprints, 2021–22. Led a quasi-experimental evaluation of the Digital Reader, and an experimental evaluation of Literacy Footprints using a matched-pair cluster assignment design, including development of logic models for both interventions, study design, analysis, and reporting.

Project Director, Evaluation of TouchMath, 2021–22. Led an evaluation using a regression discontinuity design to evaluate the effectiveness of TouchMath, a multisensory math program for struggling elementary school students.

Principal Investigator, Evaluation of Reading Horizons, 2021–22. Led the design and implementation of both a quasi-experimental and an experimental evaluation of Reading Horizons, a comprehensive K–12 reading instruction program.

Mathematica Policy Research, 2014–21

Project Director, Evaluating the Relative Effectiveness of District-Run and Charter Schools, funded by local foundation, 2020–21. Designed and led a quasi-experimental impact evaluation comparing the effectiveness of various school models in a large urban school district to inform decisions about which of those models to expand.

Task Lead, Evaluation of Promise Neighborhoods and Full-Service Community Schools, funded by IES, 2020–21. Presented design plan options to Technical Working Group. This study examined the effectiveness of Promise Neighborhoods and the Full-Service Community Schools Grant program.

Researcher, Impact Evaluation to Inform Teacher Preparation and Professional Development, funded by IES, 2019–21. Led cost analyses and analyses examining the impact on student achievement and educator effectiveness of video-based observations and feedback for teachers on their classroom practices.

- Co-Principal Investigator, Evaluation of Advanced Placement (AP) Policies in District of Columbia (DC) Public Schools, funded by IES under the REL Mid-Atlantic contract, 2018–21. Led a descriptive evaluation of enrollment patterns in DC Public Schools to inform decisions about mandating student participation in AP classes and mandating teacher participation in the AP Summer Institute program.
- Researcher, School District of Philadelphia Renaissance and Turnaround Schools Evaluation, funded by the School District of Philadelphia, 2018–20. Designed and led an impact evaluation using quasi-experimental methods to determine the relative effectiveness of various school models and to inform decisions about which models to expand.
- Researcher, Evaluation of DC Public Schools’ home visiting program, funded by IES under the REL Mid-Atlantic contract, 2018–19. Led propensity score analyses for this evaluation of DC Public Schools’ home visiting program. Oversaw the use of multiple imputation by chained equations to address missing data and the implementation of machine learning techniques to estimate propensity score models.
- Task Lead, Pathways to Work Evidence Clearinghouse, funded by the Office of Planning, Research, and Evaluation (OPRE) in the Administration for Children and Families, U.S. Department of Health and Human Services (HHS), 2018–20. Co-authored review standards and led the review of studies, including designing reviewer training materials, creating and supervising implementation of tools for tracking review outcomes, and supervising reviewers.
- Researcher, Evaluation of Departmentalized Instruction in Elementary Schools, funded by IES, 2017–21. Designed matched-pair randomization process. Redesigned analysis plan to use a quasi-experimental design using a double-robust estimator when a randomized controlled trial (RCT) became infeasible.
- Researcher, Employment Strategies Evidence Review (ESER), funded by OPRE, 2017–18. Planned, facilitated, and developed materials for a series of meetings with evidence review experts and stakeholders to develop recommendations for a new evidence clearinghouse. Led production of a report summarizing recommendations.
- Researcher, Pregnancy Assistance Fund (PAF), funded by HHS, 2016–19. Led impact analyses of a program focused on engaging and guiding parenting students in DC public high schools. Led experimental impact analysis of a program for parenting teens in Houston, TX.
- Project Director, Cleveland Metropolitan School District School Turnaround Evaluation, funded by Cleveland Metropolitan School District, 2016–18. Led an impact and implementation study of a school turnaround model to determine the effectiveness of the model and to identify barriers to implementation.
- Researcher, An Impact Evaluation of the Teacher Incentive Fund, funded by IES, 2015–17. Led impact analyses of performance-based incentives on student achievement and educator effectiveness. Co-authored study report and technical appendices. This RCT examined the impact of performance-based incentives on principal and teacher outcomes and student achievement.
- Reviewer, What Works Clearinghouse (WWC), funded by IES, 2014–21. Contributed to reviews for WWC for a wide range of topic areas, including mathematics and literacy interventions for primary students and interventions designed to improve teacher effectiveness.
- Lead Reviewer, Independent Review and Evaluation for RELs, funded by IES, 2014–21. Led reviews of reports produced by RELs, including studies of how best to measure teacher

effectiveness, teacher labor supply, predicting students' postsecondary success, and predicting student success in STEM courses.

- Researcher, Evaluation of Youth CareerConnect (YCC), funded by the U.S. Department of Labor (DOL), 2014–19. Led impact evaluation of YCC, a program designed to prepare high school students for both college and careers in a high-demand industry. This evaluation used both an RCT and a quasi-experimental propensity score design with a machine learning and a traditional logit model. Co-authored study report and led authoring of technical appendix.
- Researcher, Workforce Investment Act Gold Standard Evaluation, funded by DOL, 2014–17. Led development of analytic weights to account for unequal probabilities of site selection, assignment to treatment, and selection into a survey sample. Co-led impact analyses.

Selected Publications

- Grindal, T., Ortiz, N., & Burkander, P. (2025, November 13–15). *The impacts of extreme weather on the implementation of Head Start services* [Poster presentation]. 47th Annual Fall Research Conference of the Association for Public Policy Analysis & Management, Seattle, WA, United States.
- Burnett, A., & Burkander, P. (2021). *Advanced Placement participation, staffing, and staff training in the District of Columbia Public Schools* (REL 2021–077). U.S. Department of Education, Institute of Education Sciences, National Center for Education Evaluation and Regional Assistance, Regional Educational Laboratory Mid-Atlantic.
- McConnell, S., Schochet, P., Rotz, D., Fortson, K., Burkander, P., & Mastro, A. (2021). The effects of employment counseling on labor market outcomes for adults and dislocated workers: Evidence from a nationally representative experiment. *Journal of Policy Analysis and Management*, 40(4), 1249–1287. <https://doi.org/10.1002/pam.22305>
- Rotz, D., Sama-Miller, E., & Burkander, P. (2020). *Protocol for the Pathways to Work Evidence Clearinghouse: Methods and standards* (OPRE Report # 2020-44). U.S. Department of Health and Human Services, Administration for Children and Families, Office of Planning, Research, and Evaluation.
- Zief, S., Deke, J., Burkander, P., Langan, A., & Asheer, S. (2020). Impacts of a home visiting program enhanced with content on healthy birth spacing. *Maternal and Child Health Journal*, 24(2), 105–118. <https://doi.org/10.1007/s10995-020-02968-6>
- Burkander, P., Maxwell, N., Shiferaw, M., Jacobus, M., Vigil, A., Tilley, C., Harrington, A., Dillon, E., Inanc, H., & Schochet, P. (2019). *Building college and career pathways for high school students: Youth CareerConnect* [Study submitted to the U.S. Department of Labor, Employment and Training Administration]. Mathematica Policy Research.
- Maxwell, N., Bellotti, J., Schochet, P., Burkander, P., Whitesell, E., Dillon, E., Inanc, H., Geckeler, C., & Gonzalez, R. (2019). *Building college and career pathways for high school students: Youth CareerConnect impact findings report* [Report submitted to the U.S. Department of Labor, Employment and Training Administration]. Mathematica Policy Research.
- Speroni, C., Wellington, A., Burkander, P., Chiang, H., Herrmann, M., & Hallgren, K. (2019). Do educator performance incentives help students? Evidence from the Teacher Incentive Fund National Evaluation. *Journal of Labor Economics*, 38(3), 843–872. <https://doi.org/10.1086/706059>
- Chiang, H., Speroni, C., Herrmann, M., Hallgren, K., Burkander, P., & Wellington, A. (2017). *Evaluation of the Teacher Incentive Fund: Final report on implementation and impacts of*

pay-for-performance across four years. U.S. Department of Education, Institute of Education Sciences, National Center for Education Evaluation and Regional Assistance.

<https://eric.ed.gov/?id=ED578857>

Fortson, K., Rotz, D., Burkander, P., Mastri, A., Schochet, P., Rosenberg, L., McConnell, S., & D'Amico, R. (2017). *Providing public workforce services to job seekers: 30-month impact findings on the WIA Adult and Dislocated Worker Programs* [Report submitted to the U.S. Department of Labor]. Mathematica Policy Research.

Hannah Cheever

Senior Education Researcher Technical Assistance Provider

Summary

Hannah Cheever, MPP, has expertise in leading technical assistance projects across content areas and policy contexts; executing strategic project planning in close collaboration with state and district leaders for capacity-building efforts; dissemination, including translating research into practitioner-friendly products; qualitative data collection and analysis, including background research, surveys, literature reviews, and interviews; and project management.

Representative Research Assignments at SRI (since 2016)

Working in Partnership Lead, Regional Educational Laboratory Appalachia (REL AP), 2024–present. Funded by the Institute of Education Sciences (IES). REL AP works in partnership with school districts, state education agencies, and others to use data and research to improve outcomes for children and youth. Supports project development and implementation by ensuring all work stems from local need. Works with local education stakeholders in the community and brings expertise in facilitating partnerships comprising various capabilities to inform project implementation.

Project Lead, REL AP, Reducing Chronic Absenteeism in Kentucky, 2025–present. Funded by IES. Leads team in development of a training and coaching series to address chronic absenteeism in Kentucky. Series aims to help educators learn about and implement research-based strategies to reduce barriers to school engagement, improve school connectedness, and engage with students, families, and communities in meaningful ways.

Center Manager, Project and Product Manager (National Leadership, Capacity Building, and Communication Strands), Postsecondary Teaching with Technology Collaborative, 2021–present. Funded by IES. The Collaborative is a research and capacity-building center that aims to study and improve how faculty lead and manage online courses to support student success and build their self-directed learning skills. Supports research activities through faculty recruitment and strategic planning of research designs. Leads development and dissemination of the Self-Directed Learning Instructional Model in collaboration with partners at institutions of higher education. Co-leads development and implementation of the strategic communications plan, including conference presentations, learning sessions, blog posts, social media, and newsletters. Aids in strategic management activities, including systems development and meeting planning.

Task Lead, Opioid Affected Youth Initiative (OAYI) HWC Implementation Grant, Office of Juvenile Justice and Delinquency Prevention, 2023–present. Funded by the U.S. Department

Relevant Experience

- More than 10 years of experience in education, including serving as a classroom teacher and leading and contributing to research and technical assistance projects.
- Expertise in evidence-based practices to promote student resiliency and educator well-being.
- Experience managing diverse, multiyear projects, including tracking of milestones, contract requirements, and technical quality.
- Specializes in technical assistance, capacity-building, and project management.

Academic Background

- MPP, social and urban policy, 2020, Harvard Kennedy School
- BA, political science, with a minor in Spanish, 2012, Davidson College

of Justice (DOJ). Leads development and implementation of a series of trauma-sensitive trainings to improve school safety in Berkeley County Schools (BCS), West Virginia. Works with district partners to identify topics of training to align with district need. Supports coaching in networked improvement communities on implementation and data use for school-based teams with similar goals to promote and sustain use of trauma-sensitive practices.

Partnership and Project Lead, REL AP, Developing Resilient and Supportive Community Colleges Partnership, Pathway to Resilience, Equity, and Learning (REAL) in Community Colleges Project, 2023–25. Funded by IES. Co-led development of new products with team to promote trauma-sensitive practices across the Virginia Community College System (VCCS), working closely with VCCS and community college leaders across the state. Co-developed data collection protocols and templates with project partners to guide self-reflection and continuous improvement of their implementation of trauma-informed practices. Supported project partners in planning to disseminate these products, protocols, and templates to other VCCS staff interested in implementing trauma-informed practices.

Deputy Partnership and Project Co-Lead, REL AP, Building Safe, Caring, and Trauma-Sensitive Schools Partnership, Developing Trauma-Sensitive Classrooms Project, 2022–24. Supported the development and maintenance of a partnership with key district leaders in Marshall County Schools (MCS) and the West Kentucky Educational Cooperation (WKEC) to develop a training and coaching series on evidence-based, trauma-sensitive practices. Engaged MCS and WKEC partners to improve the district’s training for educators related to creating trauma-sensitive schools and classrooms. Led development and facilitation of training and coaching sessions to support district mental health coaches as they coached educators to implement newly learned content around the impact and symptoms of trauma, educator self-care, strategies to create a trauma-sensitive school environment, and identification of students who need more intensive supports.

Site Co-Liaison and Data Collection Lead, New Teacher Center’s Education Innovation and Research (EIR) Expansion Grant, Scaling Up Instructional Coaching in Urban and Rural Settings, 2022–23. Funded by the U.S. Department of Education. Developed and implemented a data collection plan for 300 observations in spring 2023. Participated in monthly calls with external partners from three sites (Niswonger Foundation in Tennessee, Southeast South-Central Educational Cooperative in Kentucky, and Houston Independent School District in Texas), providing project updates as well as guiding conversations on site updates. Participated in interview with teachers, coaches, and administrators in schools. Led training of observers, working toward calibration and reliability against data collection rubric (Danielson Framework).

Technical Assistance Provider, Region 4 Comprehensive Center, Public School Superintendent’s Association of Maryland (PSSAM), 2022–23. Supported development of strategic plan to guide the work of PSSAM to support superintendents across Maryland. Conducted an extensive landscape analysis of similar organizations nationwide and interviewed relevant state stakeholders to develop the plan.

Technical Assistance Provider, Region 4 Comprehensive Center, Educator Leadership in Maryland, 2022–23. Funded by the U.S. Department of Education. Supported development and implementation of intensive leadership academies for aspiring principals in Calvert County School District and aspiring superintendents across Maryland. Facilitated sessions on

use of data to inform leadership efforts, and aided in creation of session on strategies to support educator well-being.

Technical Assistance Provider, REL AP, Cross-State Collaborative to Support Schools in the Opioid Crisis (CCSSOC), 2020–21. Co-led development and delivery of multiday Virtual Trauma Support for Schools Summit, the culminating event of the CCSSOC project to share evidence-based practices to better support students and educators experiencing trauma. Supported development of resources to disseminate strategies and build participant awareness of CCSSOC-created resources, including an Action Agenda to Support Students and Educators Experiencing Trauma. Engaged experts in developing engaging sessions to deepen participant understanding of the impact of trauma on student learning and well-being. Developed working sessions with participants to share best practices and tools to strengthen their use of trauma-sensitive strategies.

Technical Assistance Provider, Region 4 Comprehensive Center, Career and Technical Education (CTE) and Work-Based Learning in Maryland, 2020–21. Examined literature and conducted interviews to draft a memo to improve Maryland’s approach to identifying, reviewing, selecting, and evaluating the industry credentials offered by secondary schools as part of their CTE programs of study.

Deputy Project Manager, REL Appalachia, 2017–18. Aided in operational and strategic management activities, including project design, systems development, deliverable monitoring, and staff supervision. Maintained regular communication with IES staff to support contract oversight, coordination, and planning.

Research Associate, New Teacher Center’s Investing in Innovation (i3) SEED, Scale-Up, and Validation Grant, U.S. Department of Education, 2016–18. Examined the impact of New Teacher Center’s intensive new teacher mentoring and support on beginning teacher retention, beginning teacher practice, and student outcomes. Conducted classroom observations across two districts, managed the online survey and incentives, and analyzed implementation fidelity. Examined the impact of New Teacher Center’s intensive new teacher mentoring and support when taken to scale. Examined the impact of New Teacher Center’s intensive model of instructional coaching on teacher retention, teacher practice, and student outcomes.

Research Associate, Evaluation of the Pharr-San Juan-Alamo Independent School District’s Safe Schools Initiative, 2016–17. Examined implementation of the Safe & Civil Schools Foundations Program, which targets the need for increased violence prevention, school safety, and educational effectiveness. Conducted interviews, administered surveys, participated in cross-case analysis, and provided formative feedback to the client to inform refinement efforts for subsequent trainings and implementation.

Other Professional Experience

Data Coordinator, Urban Teachers, Washington, DC, 2015–16. Assisted the executive director in meeting organizational goals for a four-year teacher preparation program, in the areas of resident and teacher performance, evaluation, and retention. Partnered with director of performance and evaluation and other program staff to collect data from the field in support of all accountability measures, and aided in creation of performance reports for participants.

Research Fellow, Convergence Center for Policy Resolution, Education Reimagined, 2014–15. Conducted research on key education topics to further advance a vision for the future of education, created by education innovators. Used this research to distinguish best practices in the implementation of the vision to guide the team’s networking efforts. Wrote weekly

newsletters for key interest holders regarding advancements in the field of learner-centric education.

Middle School Teacher, Benjamin D. Foulois Create and Performing Arts School, 2012–14. Taught over 250 first-, second-, seventh-, and eighth-grade students in Spanish I class. Analyzed and implemented personal Spanish curriculum. Initiated and developed collaborative program with social studies, English, and health teachers to enhance student achievement. Planned and executed two international educational and cultural immersive experiences for a core group of students.

Selected Publications, Presentations, and Commentary

- Cheever, H., & Thomas, K. (2026, March 18–20). *Beyond engagement: Evidence-based strategies for improving self-directed learning in online college STEM courses* [Conference session]. American Association of Colleges and Universities 2026 Transforming STEM Higher Education Conference, virtual. <https://postseccollab.org/aacu-2026-transforming-stem-higher-education-conference/>
- Nakamura, J., Chow, K., Cheever, H., Gates, A., Henry, L., Vanderhaar, J., & Watford, C. (2026, January 25). Attendance matters! A collaborative effort to address chronic absenteeism in Kentucky. *REL Appalachia Blog*. <https://ies.ed.gov/learn/blog/attendance-matters-collaborative-effort-address-chronic-absenteeism-kentucky>
- Cheever, H., & Schaefer, V. (2025, December 15). Building what works into what's scaling: The handle with care story. *LEARN Network Blog*. <https://learntoscale.org/building-what-works-into-whats-scaling-the-handle-with-care-story/>
- Yarnall, L., Thomas, K., Bickerstaff, S., & Cheever, H. (2025, March 12–14). *Using self-directed learning to improve online learning* [Paper presentation]. 38th International Self-Directed Learning Symposium, Tampa, FL, United States.
- Cheever, H., & Chow, K. (2024). *Developing trauma-sensitive classrooms: A training and coaching series for educators* [Infographic]. REL Appalachia. <https://ies.ed.gov/ncee/rel/Products/Region/appalachia/Resource/108122>
- Cheever, H., & Chow, K. (2024, August 8). Understanding trauma and supporting staff and students to thrive. *REL Appalachia Blog*. <https://ies.ed.gov/ncee/rel/Products/Region/appalachia/Blog/108153>
- Cheever, H., & Yamaguchi, R. (2024, June 18). *Let's get REAL: Resources to cultivate Resilience, Equity, and Learning in community colleges* [Conference session]. Community Resilience Initiative (CRI) 2024 National Conference, Pathways to Resilience: From Pillars to Pathways, Roanoke, VA, United States. <https://ies.ed.gov/ncee/rel/Products/Region/appalachia/Event/108010>
- Harding, C., & Cheever, H. (2024, July 2). Part 3: What strategies can edtech developers use to successfully launch a new innovation based on research? *Postsecondary Teaching with Technology Collaborative Blog*.
- Cheever, H., Griffiths, R., & Hoover, W. (2023, April 18–21). *Self-directed learning instruction as a tool for equity: A framework for improving student outcomes in online STEM courses* [Conference session]. OLC Innovate, Nashville, TN, United States.
- Yarnall, L., Griffiths, R., & Cheever, H. (2023). *Teaching and designing online STEM courses to support self-directed learning*. SRI International. <https://postseccollab.org/teaching-and-designing-online-stem-courses-to-support-sdl-skills/>

- Cheever, H., & Jones, B. (2022, November 2–3). *How faculty can use technology to support students' self-directed skills for managing their learning* [Poster presentation]. Educause Annual Conference, online.
- Cheever, H., & Perez, N. (2022, October 20–21). *Strategies to support students and educators experiencing trauma* [Conference session]. National Forum to Advance Rural Education, Green Bay, WI, United States.
- Booker-Dwyer, T., Friday, M., Griffin, J., Hildreth, J., Cassidy, L., Cheever, H., Jonas, D., Kelly, H., Pellerin, E., Schaefer, V., & Yarnall, L. (2020). *Maryland's work-based learning continuum: Describing the research and common practices*. Region 4 Comprehensive Center. https://www.marylandpublicschools.org/programs/Documents/CTE/Work-based Learning/MD_WBL_Continuum_Research_and_Common_Practices.pdf
- Patel, D., Wei, X., Laguarda, K., Stites, R., Cheever, H., & Goetz, R. (2018). *Evaluation of Education Connections: Supporting teachers with standards-based instruction for English learners in mainstream classrooms*. SRI Education.

Kerry Friedman

Principal Education Researcher

Specialized Professional Competence

Kerry Friedman, MPP, leads technical assistance, applied research, and dissemination projects at the federal, state, and local levels to support the use of data and evidence to inform education policy and practice. She specializes in the design and development of accessible, multimodal, and action-oriented tools, training, and resources for practitioners and families that build knowledge and capacity to use research, data, and evidence-based practices to improve student learning. As a seasoned project director, Friedman builds infrastructure and management support systems to ensure projects and staff succeed in meeting client priorities and expectations. She has extensive experience in TA leadership roles, applying her technical and management skills and subject matter and methodological expertise to translate research into actionable insights and improved practice.

Representative Research Assignments at SRI (since 2012)

Co-Principal Investigator, Accelerate, Transform, Scale (ATS) Hub, 2025–present. Funded by the Institute of Education Sciences (IES). The Hub is tasked with building a strong field of education innovators who will develop use-inspired, evidence-based products that harness emerging technologies to address urgent educational challenges. Leads needs assessment, resource development, and capacity-building focused on innovation, formative testing, and scaling for ATS program applicants and grantees.

Project Director, Evaluation of Transcend’s Math Design Journeys, 2025–present. Funded by the Overdeck Foundation via Transcend. Leads quasi-experimental design (QED) evaluation of the implementation and impact of Transcend’s community design process applied to supporting the adoption and implementation of math high-quality instructional materials (HQIM) and aligned professional learning on school culture, teacher self-efficacy and satisfaction, and student engagement and achievement.

Service Project Lead, National Comprehensive Center, 2024–present. Funded by the U.S. Department of Education. Leads project to build the capacity and coordination of the Comprehensive Center Network and other technical assistance providers, as well as their state and local education partners, to scale evidence-based math instructional practice. Provides leadership on all service project activities, including project conceptualization, resource development, and technical assistance activities.

Relevant Experience

- Builds capacity of educators, leaders, community partners, and families to use data and evidence-based practices to improve student outcomes.
- Designs and delivers research-based and user-centered tools, practices, and products for practitioners and families, applying expertise in adult learning and professional development.
- Experienced as a math educator, with subject matter expertise in math and durable skills instruction.
- Manages large federal contracts and cooperative agreements

Certifications

- Certified in WWC Procedures and Standards Version 4.1.
- Certificate in Education Finance, 2022, Georgetown University

Academic Background

- MPP, program evaluation and analysis, 2016, The George Washington University
- BA, economics, 2010, Pomona College

Project Director, Uplifting Youth by Engaging and Supporting Kinship and Grandfamilies in Schools, 2024–present. Funded by the U.S. Department of Justice Opioid Affected Youth Initiative. This capacity-building project aims to support positive outcomes for the growing number of children being raised by kinship caregivers and in grandfamilies in West Virginia by reducing barriers to family engagement in schools and enhancing partnership across the community and schools in support of families. Directs and oversees all project activities, leads collection and reporting of performance measures, and leads training and coaching for educators.

Project Director, LEARN Network, 2023–25. Funded by IES. The LEARN Network aimed to accelerate learning by increasing the use of research and evidence in education. To do this, the Network provided capacity-building to researchers in sustainably scaling their evidence-based products and programs. Led strategic operations for the Network, managed project staff and resources, and led capacity-building resource development, including the [LEARN to Scale Toolkit](#).

Partnership and Task Lead, Regional Educational Laboratory Appalachia (REL AP), 2022–present. Funded by IES. REL AP works in partnership with schools, districts, state education agencies, and others to use data and research to improve outcomes for children and youth. As task lead, directed the development of a national toolkit to translate evidence-based early math practices into actionable training and classroom resources for educators, and coordinated cross-REL program efforts on preK–12 math instruction. Led a partnership in West Virginia to train and coach school districts, out-of-school-time providers, and other community support providers to harness resources to support students' math learning and family engagement in math education. Co-led a math training event for educators in Kentucky. Co-led a project in Tennessee to support a consortium of districts in creating training and instructional materials that integrate support for the development of employability skills in core and career and technical education (CTE) courses.

Partnership Lead, Community Math Nights (CMNs), REL AP, 2018–21. Led co-design and co-development of the CMN program with educators in Kentucky and West Virginia. In partnership with state agencies and state and local partner organizations, provided technical assistance through training and coaching to educators at 71 schools to build understanding of research and strategies to engage families in rich math learning experiences. Co-authored an IES toolkit to support educators across the nation in implementing CMNs.

Deputy Director, REL AP, 2018–20. Provided operational and strategic management for the REL contract. Advised on technical assistance project design, led and maintained project management, applied quality assurance and control systems, monitored deliverables, and staffed projects. Maintained regular communication with IES staff to support contract oversight, coordination, and planning.

Dissemination Lead, REL AP, 2017–20. Led dissemination activities, including strategic communications planning; development of infographics, newsletters, social media, and blog content; implementation of large virtual and in-person dissemination events; and website development and management. Partnered with local, state, and regional organizations to amplify the reach of products and services. Designed process to co-develop dissemination products with partners to support usability.

Technical Assistance Specialist, Center for IDEA Early Childhood Data Systems (DaSy), 2014–18. Funded by the Office of Special Education Programs. The national DaSy Center provides states with technical assistance and resources to assist with the development of data systems

for early intervention and early childhood special education programs that are coordinated with other early childhood and longitudinal data systems. Provided technical assistance to state education agencies, including Pennsylvania, and supported dissemination efforts in effective data visualization, stakeholder engagement, and building capacity to communicate and use data for programmatic improvement at the state and local levels. Led the development of DaSy's [Data Visualization Toolkit](#) and was integral to the development of the [Stakeholder Knowledge Toolkit](#).

Developer and Technical Assistance Provider, Preventing Suspensions and Expulsions in Early Childhood Settings: A Program Leader's Guide to Supporting All Children's Success, 2016–17. Researched and wrote content; designed and developed interactive website; created infographics; and provided technical assistance through facilitated workshops for leaders and educators on using an interactive, [comprehensive guide](#) to reduce and prevent suspensions and expulsions in early childhood education settings. The guide provides relevant, specific recommendations that are actionable, based on research, and developed with guidance from a panel of national experts. Partnered with the Pennsylvania Training and Technical Assistance Center to promote use in early childhood settings.

Research Analyst and Project Manager, A Unified Research Agenda for 6–12 Digital Learning Environments to Improve STEM Outcomes for Students with LD and Students with ASD, funded by the National Science Foundation, 2014–18. The project entailed conducting a synthesis and gap analysis about digital STEM education for secondary students with learning disabilities (LD) and those with autism spectrum disorder (ASD) and using the results to create a research and development agenda. Managed project activities, including coordinating a project Summit and leading annual reporting; conducted literature reviews and interviews; and co-authored the final report.

Other Professional Experience

Educator, Friendship Collegiate Academy, 2010–12. Taught statistics, precalculus, and algebra II at a large, urban charter school. Developed Understanding by Design curriculum maps and unit plans for algebra II and statistics courses for use in the Friendship Public Charter School (FPCS) Network.

Selected Publications and Presentations

McCray, J. S., Reid, E., Wilkerson, S., Banse, H., Friedman, K., & Dec, S. (2026). *Teaching math to young children toolkit* (REL 2026-009). U.S. Department of Education, Institute of Education Sciences, National Center for Education Evaluation and Regional Assistance.

<https://ies.ed.gov/use-work/resource-library/resources>

Griffiths, R., & Friedman, K. (2025). *Going the Distance: Reflections on supporting scalable educational innovation*. SRI. https://learntoscale.org/wp-content/uploads/2025/12/Going-the-distance_Brief_LEARN_10292025_Acc_1.pdf

Friedman, K., Cheever, H., & Medeiros, J. (2025). Portrait of an Evidence-Based Education Ecosystem [Infographic]. SRI. https://learntoscale.org/wp-content/uploads/2025/12/LEARN_Portrait_Infographic.pdf

Cassidy, L., Rush, J., Friedman, K., Jennerjohn, A., & Cao, S. (2025). *The New Leadership Relay for New York City: Case studies of leadership development*. SRI International.

Friedman, K. (2025). *Stories of Scaling: STARI*. SRI. <https://learntoscale.org/stories-of-scaling/stari/>

- Friedman, K. (2025, September 18). Where are they now? Updates from the learn network product teams. *LEARN Network Blog*. <https://learntoscale.org/where-are-they-now-updates-from-the-learn-network-product-teams/>
- Friedman, K. (2024, January 25). Engaging both hearts and minds in design, development, and evaluation: A conversation with Vanessa Coleman. *LEARN Network Blog*. <https://learntoscale.org/engaging-both-hearts-and-minds-in-design-development-and-evaluation/>
- Friedman, K., Griffiths, R., Woods, A. D., Kelleher, J., Panou, Z., & Smith, E. C. (2024). *Learn to Scale Toolkit*. SRI International. <https://learntoscale.org/toolkit/>
- Griffiths, R., & Friedman, K. (2024, May 10). The latest takes on generative AI in education. *LEARN Network Blog*. <https://learntoscale.org/the-latest-takes-on-generative-ai-in-education/>
- Yarnall, L., Friedman, K., & Suarez, S. (2024, July 24). *Teaching employability skills: Preparing students for the future* [Presentation]. VASCD Work-Base Learning Conference, Charlottesville, VA, United States. <https://ies.ed.gov/learn/events/other/teaching-employability-skills-preparing-students-future>
- Friedman, K., & Panou, Z. (2023, May 1). Using the Invent-Apply-Transition Framework to design educational innovations for scale. *LEARN Network Blog*. <https://learntoscale.org/using-the-invent-apply-transition-framework-to-design-educational-innovations-for-scale/>
- Friedman, K., Harding, C., & Medeiros, J. (2023). *How teachers can plant SEAD (social, emotional, and academic development) in math* [Infographic]. Institute of Education Sciences, Regional Educational Laboratory Appalachia. <https://ies.ed.gov/ncee/rel/Products/Region/appalachia/Resource/107164>
- Friedman, K. (2021, July 26). New approaches to Community Math Nights: Overcoming obstacles to engage families. *REL Blog*. <https://ies.ed.gov/ncee/rel/Products/Region/appalachia/Blog/-89662>
- Friedman, K., Kassner, L., Araoz, C., & Dempsey, K. (2021). *Community Math Night facilitators' toolkit* (REL 2022-120). U.S. Department of Education, Institute of Education Sciences, National Center for Education Evaluation and Regional Assistance, Regional Educational Laboratory Appalachia. <https://ies.ed.gov/ncee/rel/Products/Region/appalachia/Publication/100359>
- Cox, M., & Friedman, K. (2019, March 11). Engaging families for math success. *REL Blog*. https://ies.ed.gov/ncee/edlabs/regions/appalachia/blogs/blog14_engaging-families-for-math-success.asp
- Cox, M., Friedman, K., Lara-Meloy, T., & Hamilton Biagas, K. (2019, April). *Nonacademic support for rural students' successful transition* [Presentation]. REL Appalachia Community Events: Community Math Nights, Chauncey and Harts, WV, United States.
- Friedman, K. (2019, June 27). Three ways to build college knowledge in high school. *REL Blog*. <https://ies.ed.gov/learn/blog/three-ways-build-college-knowledge-high-school>
- Friedman, K., & Schachner, A. (2019, March 21–23). *Effective practices for reducing suspensions and expulsions in early childhood settings. Supporting all children's success* [Poster presentation]. Biennial Meeting of the Society for Research in Child Development, Baltimore, MD, United States.
- Friedman, K., Backer, L., & Zeiders, S. (2019, July 24–26). *Collecting high quality data on the suspension and expulsion of preschoolers* [Paper presentation]. National Center for Education Statistics' STATS-DC Data Conference, Washington, DC, United States.

- Friedman, K., Jonas, D., Smith, K., & Raines, R. (2019, June). *Nonacademic support for rural students' successful transition* [Plenary]. Appalachian Education & Workforce Network Conference, Pikeville, KY, United States.
- Garcia, E., Friedman, K., Sumi, C., & Woodbridge, M. (2019, March 21–23). *Promoting social-emotional and behavioral skills through social problem-solving: A randomized controlled trial intervention* [Poster presentation]. Biennial Meeting of the Society for Research in Child Development, Baltimore, MD, United States.
- Friedman, K. (2018, April 24). Why build a logic model? *REL Blog*.
<https://ies.ed.gov/learn/blog/why-build-logic-model>
- Friedman, K. (2018, March 12). Algebra for all! Preparing students for success. *REL Blog*.
<https://ies.ed.gov/learn/blog/algebra-all-preparing-students-success>
- Friedman, K., & Jonas, D. (2018, February). *Assessing which programs and interventions support college and career readiness in Kentucky* [Presentation]. REL Appalachia Workshop, Corbin, KY, United States.
- Friedman, K., Linehan, P., Nguyen, J., & Furney, A. (2018, August 14–16). *Telling your data story with an infographic* [Presentation]. Improving Data, Improving Outcomes Conference, Arlington, VA, United States.
- Schiller, E., Blackorby, J., Bakia, M., K., F., & Gardner, S. (2018). *Emerging digital technologies in STEM learning: A research agenda for improving success of students with learning disabilities or with autism spectrum disorder*. SRI International.
- Shaver, D., & Friedman, K. (2018, August 14–16). *Let's talk data: Making data conversations engaging and productive* [Presentation]. Improving Data, Improving Outcomes Conference, Arlington, VA, United States.
- Gundler, D., Nicholas, A., & Belodoff, K. (2017, October). *Data-informed stakeholders: Building family capacity to understand and use EI/ECSE program data* [Symposium]. Division for Early Childhood's 33rd Annual International Conference on Young Children with Special Needs and Their Families, Portland, OR, United States.
- Juffras, J., Belodoff, K., Schmitt, R., Song, C., & Zimdahl, N. (2017). *Critical work of the child fatality review committee should build on recent reforms*. Office of the District of Columbia Auditor.
- Schachner, A., & Belodoff, K. (2017, October). *Effective practices for reducing suspensions and expulsions in early childhood settings: Supporting all children's success* [Symposium]. Division for Early Childhood's 33rd Annual International Conference on Young Children with Special Needs and Their Families, Portland, OR, United States.
- Schachner, A. C. W., Belodoff, K., Chen, W.-B., Kutaka, T., Fikes, A., Ensign, K., Chow, K., Nguyen, J., & Hardy, J. (2016). *Preventing suspensions and expulsions in early childhood settings: A program leader's guide to supporting all children's success*. SRI International.
<https://preventexpulsion.org/>

Anna Jennerjohn

Senior Education Researcher

Anna Jennerjohn, PhD, is a senior education researcher in the Education Division with a focus on literacy development for students in PK–8. Her expertise includes mixed methods, design-based research, and technical assistance for pre- and in-service educator learning. She draws on her years as a coach, teacher educator, and curriculum developer to drive responsive evaluation and research that provides improved outcomes for elementary students and their teachers alike. She has served as lead evaluator on projects funded by the National Science Foundation and the U.S. Department of Education.

Representative Research Assignments at SRI (since 2024)

Co-Principal Investigator, Evaluation of Bilingual and Multilingual Educator Pathways, National Professional Development grant, Alder Graduate School of Education, 2024–present. Leads research design and implementation, including survey, document review, and interviews to improve pathways for multilingual teacher candidates.

Project Director, Evaluation of New Teacher Center’s Education Innovation and Research (EIR) grant, Social-Emotional Learning (SEL)-Focused Coaching, 2024–present. Provides project management for the evaluation team. Analyzes interview data and provides deliverables on project outcomes.

Researcher, The Leadership Academy—Study of the Culturally and Linguistically Sustaining Partnership. 2024–present. Develops Advisory Board of community members. Provides Advisory Board onboarding and leads ongoing meetings. Uses culturally responsive evaluation principles to establish community feedback and leadership via the board.

Classroom Observation Lead, Urban District Literacy Collaborative (UDLC) Research Project, funded by the Schusterman Foundation, 2024–present. Leads classroom literacy observations across 30 schools with an evaluation team of 13 using a validated tool for equitable reading instruction, totaling over 600+ classroom observations. Serves as co-site lead in one large, urban district. Provides subject matter expertise in elementary literacy instruction in foundational skills. Leads reporting for classroom observations to share actionable data to school districts and funders.

Other Professional Experience

Senior Research Associate, Rockman et al. Cooperative (2023–24)

Principal Investigator (PI), Evaluation of Twin Cities Public Television STEM Tales, National Science Foundation, Innovative Technology Experiences for Students and Teachers (ITEST)

Relevant Experience

- Two decades of experience supporting PK–8 literacy education through research, teaching, curriculum design, and leading professional development.
- Fluent in design-based research and mixed methods.
- Content expertise in literacy development, multilingual language acquisition, and MTSS for students in PK–8.

Academic Background

- PhD, curriculum and instruction—literacy education, 2022, University of Minnesota, Twin Cities
- MA, organizational leadership and policy development—education policy and leadership, 2017, University of Minnesota, Twin Cities
- BA, sociology and elementary education, provost scholar, 2005, University of Northern Iowa

Grant. Led front-end, formative, and summative evaluation activities for a library-based digital STEM read-aloud program targeting young children with identities historically underrepresented in STEM careers.

Researcher, Cabrini University EXITO and ADELANTE, U.S. Department of Education, National Professional Development Grant. Led survey collection for family literacy events and teacher professional development coursework. Used survey feedback to help the program team improve multilingual learner coursework for teachers and literacy events for families.

PI, Evaluation of Coppin State University Center for Inclusive Excellent, U.S. Department of Education, Teacher Quality Partnership and Supporting Effective Education Development Grants. Led team of three to provide culturally responsive and equitable evaluation to the Center, a collaboration between local education agencies, state education agencies, and institutions of higher education to prepare culturally competent teachers.

PI, Evaluation of Northwestern University, Elementary Science Teacher Leaders (ESTELE), National Institutes of Health, Science Education Partnership Award. Provided evaluation services as Northwestern University worked to bring inquiry-based, language-focused science instruction to elementary schools in Chicago Public Schools.

Co-Investigator, Let's Learn Literacy Study, WNET New York. Led an exploratory study for family literacy videos for multilingual students in New York City.

Research Site Lead, Twin Cities Public Television Skillsville, U.S. Department of Education, Ready To Learn (RTL) Grant. Employed culturally responsive and equitable evaluation techniques to evaluate the pilot Skillsville Family Program for executive functioning and self-regulation strategies across sites. Improved family feedback participation rates from 45% to 100%. Designed a reflection circle model for increased community transparency, communication, and feedback in the research process.

Instructor and Research Assistant, Minnesota Center for Reading Research, University of Minnesota (2017–22)

Curriculum Lead, Path to Reading Excellence in School Sites (PRESS), English Learners Edition, 2017–19. in tailoring the multi-tiered systems of support in reading for multilingual learners. Developed professional learning (PL) sessions for local and regional education agencies in accordance with the PRESS English Learners materials.

Curriculum Lead, PRESS, Middle School Edition, 2017–20. Developed the PRESS Middle School reading supports along with Dr. Matt Burns.

Research Lead, PRESS Middle School Design-Based Research Study, 2017–21. Led the 4-year design-based research study of the PRESS Middle School model for middle schoolers who needed reading support across local education agencies with high percentages of multilingual learners. Tailored the PL sessions to support both literacy and language learning.

Instructor, Reading and Writing Methods for Elementary Teachers, 2018–22. Taught graduate preservice teachers about asset-based literacy pedagogies and science integration with the Science/Literacy Integration Project (SLIP) and the Science of Reading.

Researcher, Co-Creation of Culturally Sustaining Early Texts with Emergent Bilingual Children, 2019–20. Led this study using discourse analysis techniques; the study resulted in two peer-reviewed articles: one for researchers and one for practitioners.

Researcher, Natural Partners: Learning from Young Students' Writing After Science Lessons Outdoors, 2021–22. Led this study using repeated measures to examine the effects of outdoor and indoor science lessons on young students' writing with case study foci on emergent multilingual students.

Instructor, Global Stories of Education, 2022. Taught undergraduate students a participatory literature course using global young adult literature, centering the experiences and languages of young characters.

Practitioner Experience (2005–15)

Elementary Teacher, District 196, Apple Valley, Minnesota, 2014–15. Taught fourth-grade students, who spoke five home languages, using direct instruction, culturally relevant pedagogies, and integrated, high-interest content.

Literacy Specialist and Coach, Academia César Chávez, St. Paul, Minnesota, 2009–14. Led staff development, literacy curriculum selection, and the coaching team for a bilingual elementary school.

Elementary Teacher, Escuela Americana de Tampico, Tampico, Tamaulipas, México, 2007–09. Taught emergent multilingual elementary students across all content areas.

Elementary Teacher, Des Moines Public Schools and Boone Public Schools, 2005–07.

Selected Publications, Presentations, and Commentary

Jennerjohn, A., Rutherford-Quach, S., & Cassidy, L. (2026, May 20). Decoding is not enough: Connecting word reading to meaning in early literacy. *The 74*.

<https://www.the74million.org/article/decoding-is-not-enough-connecting-word-reading-to-meaning-in-early-literacy/>

Jennerjohn, A., Rutherford-Quach, S., Cassidy, L., Woodworth, K., Dec, S., Reynolds, D. (2026). *Bridging the divide: Connecting word recognition and language comprehension in early literacy* [Learning brief]. SRI. https://www.sri.com/wp-content/uploads/2026/04/UDLC-Foundational-Skills-Learning-Brief_04212026.pdf

Shea, L. M., Allen, A., & Jennerjohn, A. (in press). Unlock science & literacy: Discover the power of recorded read-alouds. *Exchange Community Voices*.

Shea, L. M., Jennerjohn, A., Allen, A., & Hessen, K. (in press). Enhancing literacy skills through video read-alouds: A pathway to meaning making. *Journal of Early Childhood Literacy*.

Ittner, A. C., Jennerjohn, A., & Helman, L. (2025). Insights into multilingual students to capitalize on their language knowledge. *The Reading Teacher* (early view online). <https://doi.org/10.1002/trtr.2384>

Mielicki, M., Alozie, N., Yang, H., Rachmatullah, A., & Jennerjohn, A. (2025, December 1). Three lessons learned from collaborating with teachers on first-grade formative science assessment design. *STEM & CS Blog*. <https://stemandcs.org/three-lessons-learned-from-collaborating-with-teachers-on-first-grade-formative-science-assessment-design/>

Reynolds, D., Rutherford-Quach, S., Cassidy, L., Jennerjohn, A., & Woodworth, K. (2025). *Beyond the surface: Leveraging high-quality instructional materials for robust reading comprehension* [Learning brief]. SRI.

Jennerjohn, A., & Tidd, R. (2024, July 31–August 3). *Beyond the kidney table: The why and how of outdoor literacy* [Presentation]. Natural Start Conference, Portland, OR, United States.

Jennerjohn, A., Morice, A., & Agortsas, F. (2024, January 30). *Multiple language learning in nature-based classrooms* [Webinar]. Natural Start Alliance. <https://eeepro.naaee.org/learning/webinar-multiple-language-learning-nature-based-classrooms>

Jennerjohn, A. (2024). From story to book: Discourse analysis between teacher and student in the creation of a culturally relevant text. *Journal of Early Childhood Literacy*, 24(1), 191–216. <https://doi.org/10.1177/14687984211051085>

- Jennerjohn, A., Peterson, D. S., & Cavanaugh, C. (2024). Nearby nature: An interdisciplinary science, literacy, and technology project situated within a traditional teacher preparation program. *Action in Teacher Education*, 46(1), 21–37.
<https://doi.org/10.1080/01626620.2023.2270923>
- Jennerjohn, A. (2023, October 18–20). *The outdoors as language partner* [Presentation]. North American Association for Environmental Education Conference, virtual.
- Jennerjohn, A. (2023, July 24–25). *What's the word: Language learning with emergent multilinguals outdoors* [Live session]. Natural Start Conference, virtual.
- Pierson, S. J., Moscovici, B., Allen, A., Gentile, A., Esposito, G., & Jennerjohn, A. (2023, April 10–13). *Family literacy workshops that include bilingual storybook reading, writing activities, creative dramatics, and hands-on activities connect families to school communities and students learning* [Poster presentation]. Office of English Language Acquisition – National Professional Development Conference, Washington, DC, United States.
- Burger, K., & Jennerjohn, A. (2023). The promise of virtual coaching for professional learning in word study and beyond. In A. C. Ittner, A. Frederick, D. Kiernan, & D. R. Bear (Eds.), *Implementing developmental word study* (pp. 113–129). Guilford Press.
- Jennerjohn, A. (2023). Playing in a patch of dirt: Eleven picture books and a plug for nearby nature. *Climate Literacy in Education*, 1(1), 15–20. <https://doi.org/10.24926/cle.v1i1.5236>
- Jennerjohn, A. (2022, October 11–15). *Ever-present realia: Researching outdoor learning for emergent multilinguals* [Presentation]. North American Association for Environmental Education Conference & Research Symposium, Tucson, AZ, United States.
- Jennerjohn, A. (2021). *Multi-tiered system of supports for middle school literacy* [PRESS white paper]. Minnesota Center for Reading Research.
- Peterson, D., Helman, A., Jennerjohn, A., & Payeur, A. (2021). *Reading instruction for students with characteristics of dyslexia: A workshop for elementary educators* [Online, self-paced workshop]. Minnesota Center for Reading Research. <https://events.tc.umn.edu/reading-research/event/3528-reading-instruction-for-students-with>
- Jennerjohn, A. (2021, October). *Nearby nature and literacy: Learning with, for and in local natural spaces* [Presentation]. Minnesota Center for Reading Research Conference, virtual.
- Peterson, D., Jennerjohn, A., & Cavanaugh, C. (2021, July 12–15). *Right outside your window: Literacy, science and technology integration* [Paper presentation]. Hamline Summer Literacy Institute, virtual.
- Jennerjohn, A., & Stretch, E. (2021, April 28). *Right outside your window: Poetry and wonder wander* [Virtual workshop]. Teach Outdoors! Minnesota.
<https://www.teachoutdoorsminnesota.com/spring-2021-workshops>
- Jennerjohn, A. (2020, November 19–22). *Making mirrors: Creating books with young students and their families* [Paper presentation]. National Council of Teachers of English Conference, virtual.
- Jennerjohn, A. (2020, October). *Path to reading excellence in school sites: Middle school pilot* [Presentation]. Minnesota Center for Reading Research Conference, virtual.
- Jennerjohn, A., & Heyer, J. (2020, July 25–29). *Early literacy benefits of nature-based learning* [Presentation]. Natural Start Conference, virtual.
- Jennerjohn, A. (2020, July 25–29). *Stories that spark: Speculative fiction in the forest* [Presentation]. Natural Start Conference, virtual.

- Jennerjohn, A. (2020). School–family partnerships for culturally sustaining texts. *The Reading Teacher*, 73(5), 657–661. <https://doi.org/10.1002/trtr.1891>
- Jennerjohn, A. (2020). *Multi-tiered systems of support in reading at this critical time* [PRESS white paper]. Minnesota Center for Reading Research.
- Helman, L., Jennerjohn, A., Shanahan, E., & Payeur, A. (2020). *Addressing dyslexia* [Research brief series]. Minnesota Center for Reading Research.
- Jennerjohn, A., Helman, L., Burger, K., & Burns, M. K. (2019, December 4–7). *A university-district partnership to provide literacy supports for developing middle school readers* [Paper presentation]. Literacy Research Association Conference. Tampa, FL, United States.
- Jennerjohn, A. (2019, December 4–7). *Discourse analysis of chronotope and revoicing in the co-creation of a culturally-relevant children’s text* [Paper presentation]. Literacy Research Association Conference, Tampa, FL, United States.
- Jennerjohn, A., & Eckert, L. (2019, August). *Support for developing middle school readers: A case study* [Paper presentation]. Minnesota Center for Reading Research Conference, Minneapolis, MN, United States.
- Praska, B., & Jennerjohn, A. (2019, November). *Middle school MTSS and literacy: What research says is working for developing readers* [Webinar]. Minnesota Center for Reading Research.
- Jennerjohn, A., & Praska, B. (2019, April). *Multi-tiered system of supports for middle school readers: Lessons learned from the field* [Presentation]. Minnesota Center for Reading Research Brown Bag Session, Minneapolis, MN, United States.
- Jennerjohn, A. (2018). *How does PRESS support instruction for students with dyslexia?* [PRESS white paper]. Minnesota Center for Reading Research.
- Jennerjohn, A., Helman, L., & Burns, M. K. (2018, November 18–December 1). *“She’s trying to stay invisible”: Piloting a literacy support framework in middle school* [Paper presentation]. Literacy Research Association Conference, Palm Desert, CA, United States.

Jessica Mislevy

Director of Digital Learning & Technology Policy

Specialized Professional Competence

Jessica Mislevy, PhD, directs SRI's Digital Learning & Technology Policy program. With 20 years of experience and a background in measurement and statistics, she leads mixed-methods research, evaluation, and technical assistance projects to improve college readiness and completion through the effective adoption of educational technology products and programs. Mislevy develops instruments and assesses their psychometric properties; designs sampling plans, random assignment protocols, and quasi-experimental matching protocols; uses quantitative and qualitative techniques to collect and analyze data; conducts secondary analyses of large-scale datasets; provides technical assistance to educators and developers around rigorous evaluation design and evidence standards; authors reports and gives presentations for audiences of varying technical levels; co-develops research-informed interventions, tools, and resources with education stakeholders and end users; engages with clients to set project tasks, priorities, and schedules; and manages teams on complex, multiyear projects and monitors budgets to ensure the timeliness and quality of the work.

Representative Research Assignments at SRI (since 2011)

Principal Investigator, Postsecondary Teaching with Technology Collaborative, 2022–present.

Funded by the U.S. Department of Education,

Institute of Education Sciences (IES). A national research and development center seeking to improve student success in foundational online STEM courses in open-access postsecondary institutions through research activities, national leadership, capacity-building, and dissemination activities, by generating new knowledge about how colleges can support students' development and application of self-directed learning (SDL) competencies in online courses. Led rapid cycle experiments to co-develop and test strategies to support specific SDL skills and mindsets, which included quasi-experimental designs to explore impact on students' SDL skills (survey self-reports and behavioral indicators from students' interactions with learning management systems) and academic outcomes, as well as qualitative data to provide formative feedback and insights about the strategies and their implementation. Oversees the design and execution of a pilot study to explore the usability,

Relevant Experience

- Conducts large-scale, mixed-methods impact studies and applied research.
- Builds capacity of educators, leaders, and developers to use data and evidence-based practices to improve student outcomes.
- Co-designs research-based and user-centered products and resources with and for practitioners.
- Manages large federal contracts and grants.

Certifications

- What Works Clearinghouse reviewer certification, group design standards (version 4.1), 2021
- Graduate Certificate, intermediate survey methodology, 2010, University of Maryland, College Park
- Certificate, women's studies, 2005, University of Maryland, College Park

Academic Background

- PhD, measurement, statistics, and evaluation, 2011, University of Maryland, College Park
- MA, measurement, statistics, and evaluation, 2006, University of Maryland, College Park
- BA, criminology and criminal justice, 2005, University of Maryland, College Park

feasibility, promise for improving student outcomes, and time and resources needed to implement the final, integrated set of instructional strategies. Leads and contributes to dissemination of findings to researchers and practitioner audiences.

Principal Investigator, Assessing the Efficacy and Implementation of a Technology-Based Mathematics Intervention for Middle School Students, 2023–present. Funded by the National Science Foundation. A randomized controlled trial to assess the implementation of EMPIRES, a collaborative online mathematics game for middle school students, its impact on mathematics achievement, factors that mediate its effectiveness, and conditions that facilitate successful use. Recruited teachers from three districts across two states. Oversaw the development of student and teacher surveys, teacher and administrator interview protocols, and protocols for gameplay data extraction and analysis to monitor implementation and behavior indicators of student motivation and resiliency. Oversaw random assignment of participants to EMPIRES or business-as-usual conditions for the 2024/25 school year, and data collection and analysis. Presented and co-authored publications on study findings.

Co-Principal Investigator, LEARN Network Scaling Lead, 2022–25. Funded by IES. A research network focused on identifying and ameliorating the barriers to equitably scaling evidence-based educational products by (1) working closely with educators and leaders in the education marketplace, (2) providing support to product developers in the network around adapting and preparing to scale up their evidence-based products, and (3) generating a broader set of resources to support the scaling of any evidence-based product intended for use in education settings. Led a mixed-methods research study on K–12 procurement practices and use of evidence therein, which included qualitative interviews with a broad array of education stakeholders and nationally representative surveys of school and district leaders. Authored a journal manuscript, co-authored a series of research briefs, presented at conferences, and oversaw the development of an interactive data dashboard.

Postsecondary Transitions Partnership Lead, Regional Educational Laboratory Appalachia (REL AP), 2017–21. Funded by IES. Worked in partnership with representatives from the Virginia Department of Education (VDOE), the Virginia Community College System (VCCS), and the State Council of Higher Education for Virginia (SCHEV) to conduct rigorous applied research combined with responsive training, coaching, and technical support and practitioner-focused information-sharing to ensure that evidence informs practice. Co-designed and led a secondary data analysis of Virginia Longitudinal Data System (VLDS) administrative data for VDOE to compare the academic performance of students completing online courses through Virtual Virginia to similar students completing place-based courses via regression adjustment. Supported VDOE’s development of a toolkit to assess the cost of online learning programs and adapted the materials to produce the Cost-Feasibility Analysis Toolkit, a REL toolkit for education leaders nationwide. Supported VDOE in developing a logic model for a new virtual learning initiative, GoOpenVA. Provided in-depth coaching to VDOE representatives and college access providers to increase their understanding of the evidence-based interventions available to support postsecondary transitions and their capacity to assess whether an intervention is evidence-based. Led the development of the College Access Evidence Matrix, an informational resource to help educators easily find proven interventions.

Co-Principal Investigator, Evaluation of the Open Educational Resources (OER) Degree Initiative, 2016–20. Funded by the William & Flora Hewlett Foundation, the Bill & Melinda Gates Foundation, Great Lakes Higher Education Corporation & Affiliates, and the

Speedwell and Shelter Hill Foundations. Evaluation of a multi-funder initiative led by Achieve the Dream seeking to boost college access and completion, particularly for underserved students, through the redesign of courses and degree programs with open educational resources in place of proprietary textbooks across 38 community colleges (six Virginia community colleges). Included quasi-experimental studies to estimate the impact of OER degrees on key student outcomes, cost analyses to measure cost effectiveness and sustainability, and implementation research to provide formative feedback to grantees and the broader community. Led quantitative analyses. Oversaw development, administration, and analysis of student and instructor surveys. Conducted site visits and interviews. Presented and co-authored publications on study findings.

Grantee Liaison, Evaluation of the Next Generation Courseware Challenge, 2015–18. Funded by the Bill & Melinda Gates Foundation. An evaluation of the Next Generation Courseware Challenge involving seven projects developing a new generation of personalized digital courseware for high-enrollment undergraduate courses to improve student outcomes, particularly for low-income and underserved students. Provided technical assistance to grantees to support their participation in rigorous research evaluations to measure student impact and capture and share relevant lessons for broad dissemination. Conducted site visits to postsecondary institutions to collect implementation data via interviews and observations.

Project Director, STEM Master Teacher Leader Program Analysis and Support, 2014–16. Funded by the U.S. Department of Education. An initiative to build capacity in the STEM teacher leadership community by spurring research action around common challenges and promising practices for programs designed to develop and support teacher leaders. Designed and led a landscape scan of teacher leader programs and analyzed gaps between programs in STEM relative to other content areas. Co-organized and facilitated a STEM Teacher Leader Community Convening to identify pressing issues and set an agenda for Research Action Clusters (RACs) staffed with expert practitioners and supported by SRI research partners. Facilitated virtual collaboration meetings of the Evaluation of Teacher Leader Programs RAC. Oversaw the cross-RAC development of an integrated web resource with practical information for the planning, implementation, and improvement of STEM teacher leadership.

Project Director, Supporting the Development of a K–12 STEM Education Indicator System, 2013–16. Funded by the National Science Foundation. A project to lay the groundwork for a K–12 STEM education indicator system by compiling data where available, outlining a research agenda to support the collection of enhanced data in the future, and engaging with stakeholders to raise awareness and solicit input. Developed protocols and conducted interviews with policymakers, researchers, and statistical agencies. Convened meetings of the project's Advisory Group and other experts. Obtained and served as Principal Project Officer on a restricted-use data license from the National Center for Education Statistics (NCES). Conducted secondary analyses of large-scale survey and assessment datasets to produce measures of the indicators and explore associations with student achievement. Led weekly team meetings and communications with the client. Built and monitored budgets and statements of work for subcontractors and consultants. Presented and co-authored project reports to a range of technical and practitioner audiences.

Quantitative Analyst, Evaluation of the Sustainability and Effectiveness of AP Science Courses, 2012–16. Funded by the National Science Foundation. A randomized controlled trial with the University of Washington and George Washington University to study the implementation and impact of the College Board's new inquiry-based AP science curriculum. Drafted,

piloted, and field-tested surveys for students and teachers. Investigated the psychometric properties of assessment items developed to measure students' science inquiry skills using classical test theory and item response theory.

Selected Publications and Presentations

- Wang, H., Mislevy, J., & Yang, H. (2025, October 8–11). *Assessing the efficacy of a game-based mathematics intervention: A pilot study* [Poster presentation]. Society for Research on Educational Effectiveness Conference, Chicago, IL, United States.
- Yang, H., Wang, H., Mislevy, J., Tate, C., Mielicki, M., & Ouyang, S. (2025, July 22–23). *Promoting intervention at scale: Exploring middle school student math motivation and engagement in the context of digital game-based learning* [Poster presentation]. ACM Learning @ Scale 2025, Palermo, Italy.
- Burkander, P., Thomas, K., Yu, R., Mislevy, J., Cao, Q., Lin, X., & Yao, C. (2024, September 18–21). *Improving student success in online STEM courses using technology-based interventions* [Presentation]. Society for Research on Educational Effectiveness, Baltimore, MD, United States.
- Mislevy, J., Joshi, E., Bengue, C., Smith, E., & Walters, K. (2024, June 23–26). *A district like mine: When, why, and how do educators adopt evidence-based products?* [Paper presentation]. International Society for Technology in Education Conference & Expo, Denver, CO, United States.
- Griffiths, R., Mislevy, J., & Wang, S. (2022). Encouraging impacts of an Open Education Resource Degree Initiative on college students' progress to degree. *Higher Education*, 84(5), 1089–1106. <https://doi.org/10.1007/s10734-022-00817-9>
- Pratt-Williams, J., Harris, J., Saucedo, D., & Mislevy, J. (2021). *Cost-feasibility analysis toolkit for supplemental online programs: User guide* (REL 2021–105). U.S. Department of Education, Institute of Education Sciences, National Center for Education Evaluation and Regional Assistance, Regional Educational Laboratory Appalachia.
- Mislevy, J., Schmidt, R., Puma, M., Ezekoye, A., & Saucedo, D. (2020). *Comparing the achievement of students in Virtual Virginia and face-to-face courses*. SRI International. <https://eric.ed.gov/?id=ED602892>
- Seeratan, K. L., McElhaney, K. W., Mislevy, J. L., McGhee, R., Conger, D., & Long, M. C. (2020). Measuring scientific inquiry in a randomized control trial study of Advanced Placement biology and chemistry courses. *Educational Assessment*, 25(2), 112–135.
- Bakia, M., Mislevy, J., Heying, E., Patton, C., Singleton, C., & Krumm, E. (2013). *Supporting K–12 students in online learning: A review of online Algebra I courses*. SRI International.
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Dan Reynolds

Senior Education Researcher | LinkedIn profile: www.linkedin.com/in/dan-reynolds-literacy

Summary

Dan Reynolds, PhD, is a top national voice in adolescent literacy research and translational science. Drawing from his experience as an English teacher and school administrator, he has developed a high-impact research agenda on all aspects of adolescent literacy, with special focus on complex text comprehension across subjects and evaluating Tier 2 foundational skills interventions. His research has been published in leading international literacy research journals, and he also writes for practitioner journals and blogs, cultivates intellectual leadership in adolescent literacy on LinkedIn, and appears on podcasts connecting literacy research to practice.

Representative Research Assignments at SRI (since 2024)

Principal Investigator, [Evaluation of Nebraska's Comprehensive Literacy State Development \(CLSD\) grant](#). Leads five-year implementation and impact study examining the degree to which Nebraska's CLSD grant is implemented with coherence and as intended and estimating the impact on student literacy achievement.

Steering Committee Leader, Reimagining Reading Comprehension Assessment project. Developing strategy paper to inspire vendors and districts nationwide to improve reading comprehension assessment to better serve student outcomes. Guides committee of thought leaders including professors from Harvard, Stanford, and Vanderbilt universities.

Principal Investigator, [Evaluation of Structured Linguistic Phonics Instruction](#), funded by Reading Reimagined Project at the Advanced Education Research and Development Fund (AERDF), 2024–present. Co-leads randomized controlled trial and leads follow-up interview and focus group analyses to understand how implementation shapes impact.

Senior Researcher, Reading Apprenticeship for Academic Literacy Learning (RA4ALL), Education Innovation and Research (EIR) Mid-Phase Grant from the U.S. Department of Education, 2024–present. Leads selection of optimal comprehension outcomes, the design and collection of teacher logs for measuring instructional fidelity and collaborates on all aspects of evaluation of the RA4ALL instructional program, which combines Reading Apprenticeship Academic Literacy (RAAL) comprehension instruction with Systematic Instruction in Phonological Awareness, Phonics, and Sight Words (SIPPS) instruction.

Senior Researcher, [Urban District Literacy Collaborative \(UDLC\) Research Project](#), funded by the Schusterman Foundation, 2024–present. Collaborates on survey and interview instrument development, and serves as co-site lead in large urban district. Subject matter expert on K–5 literacy instruction with high-quality instructional materials (HQIM) in foundational skills and knowledge-rich comprehension instruction.

Relevant Experience

- Leads large-scale, multi-state implementation and impact studies.
- Translates research to practice at classroom, district, and state levels.
- 20+ peer-reviewed publications on all aspects of adolescent literacy.
- Mixed-methods expertise in studying literacy across a range of theoretical and practical approaches.
- 8 years of classroom experience as high school ELA teacher and administrator in OH, LA, TN, and TX.

Academic Background

- PhD, language, literacy & culture, 2017, Vanderbilt University
- MEd, secondary English education, 2008, University of Notre Dame
- BA, English, 2006, University of Notre Dame

Other Professional Experience

National Professional Learning (PL) and Translational Science Consultant, 2017–present.

Delivered custom PL workshops, symposium keynotes, and webinars for national organizations (e.g. Council of Chief State School Officers, XQ Institute, Schusterman Foundation); state literacy conferences in Ohio, Nevada, Wisconsin, and Wyoming; and regional consortia and school districts around Ohio. Wrote guest blog posts and appeared on literacy podcasts for both researchers and practitioners. Former member of Ohio State Literacy team and co-author of Ohio’s original Plan to Raise Literacy Achievement.

Coyle Fellow, University of Notre Dame Center for Literacy Education, 2019–present. Builds network and grows research agenda in conjunction with university scholars and faculty.

Awarded 2023 Michael Pressly Award for Promising Scholar in the Education Field.

Associate Professor of Literacy Education and Director of Graduate Studies, John Carroll University (JCU), 2022–24. Expanded adolescent literacy research agenda and secured \$689,855 in external funding to support research initiatives, enrich accelerated teacher preparation programs, and partner with nearby districts to provide high-dosage tutoring to accelerate post-pandemic literacy learning. Expanded enrollment in largest MED program by 33% and completion by 50% over two years.

Chair, Department of Education, JCU, 2023–24. Led department of eight full-time faculty, 10 part-time faculty, and 2.5 FTE staff members. Convened committee to overhaul primary education STEM content sequence. Led committee to examine accreditation alignment with institutional and departmental mission, leading to a switch from CAEP to AAQEP accreditors. Led teams in collaborating on initial accreditation report and planning for site visit to secure new accreditation.

Assistant Professor of Literacy Education, JCU, 2017–21. Developed adolescent literacy research agenda; revised literacy teacher education curriculum to align with Ohio state standards and licensure exams; granted tenure one year early. Taught courses in literacy concepts, assessment, theory, and intervention to both undergraduate and graduate elementary, middle, and secondary teacher candidates.

Professional Leadership

Consulting Editorial Board, *Reading Research Quarterly*, 2024–present. Only nonacademic member on the [consulting editorial board](#) of the flagship research journal of the International Literacy Association. Peers on the board are top international literacy researchers.

Adolescent Literacy Area Chair, Literacy Research Association, 2023–24. Organized and vetted proposals for adolescent literacy research presentations at international conference.

Ohio State Literacy Team, 2017–21. Co-authored adolescent literacy work; provided feedback on development of state literacy plan.

Selected Publications, Presentations, and Commentary

Jennerjohn, A., Rutherford-Quach, S., Cassidy, L., Woodworth, K., Dec, S., & Reynolds, D. (2026). *Bridging the divide: Connecting word recognition and language comprehension in early literacy*. [Learning brief]. SRI. <https://www.sri.com/publication/bridging-the-divide-connecting-word-recognition-and-language-comprehension-in-early-literacy/>

Reynolds, D., Rutherford-Quach, S., Cassidy, L., Jennerjohn, A., & Woodworth, K. (2025). *Beyond the surface: Leveraging high-quality instructional materials for robust reading comprehension* [Learning brief]. SRI. <https://www.sri.com/publication/beyond-the-surface-leveraging-high-quality-instructional-materials-for-robust-reading-comprehension/>

- Lupo, S. M., Reynolds, D., & Hardigree, C. (2024) *Tackling tough texts: A research-based guide to scaffolding learning in grades 6–12*. Guildford Press.
- Reynolds, D., Kemper, B. R., & Collette, K. (2025). High school foundational skills intervention in context: Lessons from a research–practice partnership in an urban district. *Journal of Adolescent & Adult Literacy*, 68(4), 392–399. <https://doi.org/10.1002/jaal.1402>
- Reynolds, D., & Hattan, C. (2024). Baseball, presidents, and state test passages: Considering gendered knowledge in literacy research, curricula, and assessments. *The Reading Teacher*, 77(6), 997–1000. <https://doi.org/10.1002/trtr.2330>
- Reynolds, D., Hattan, C., & Markham, M. (2024). Fair or foul? Interrogating the role of baseball knowledge in studies of knowledge and comprehension. *Reading Research Quarterly*, 60(1), Article e575. <https://doi.org/10.1002/rrq.575>
- Curtin, A., & Reynolds, D. (2022). Beyond Spanish: Building truly multilingual classroom and school libraries. *Language Arts*, 99(5), 343–347. <https://doi.org/10.58680/la202231794>
- Goodwin, A. P., Petscher, Y., & Reynolds, D. (2022). Unraveling adolescent language & reading comprehension: The monster’s data. *Scientific Studies of Reading*, 26(4), 305–326. <https://doi.org/10.1080/10888438.2021.1989437>
- Reynolds, D. (2022). What is an ELA text set? Surveying and integrating cognitive, critical and disciplinary lenses. *English Teaching: Practice & Critique*, 21(1), 98–110. <https://doi.org/10.1108/ETPC-06-2021-0075>
- Goodwin, A. P., Cho, S. J., Reynolds, D., Silverman, R., & Nunn, S. (2021). Explorations of classroom talk and links to reading achievement in upper elementary classrooms. *Journal of Educational Psychology*, 113(1), 27–48. <https://doi.org/10.1037/edu0000462>
- Reynolds, D. (2021). Of research reviews and practice guides: Translating rapidly growing research on adolescent literacy into updated practice recommendations. *Reading Research Quarterly*, 56(3), 401–414. <https://doi.org/10.1002/rrq.314>
- Reynolds, D. (2021). Scaffolding the academic language of complex text: An intervention for late secondary students. *Journal of Research in Reading*, 44(3), 508–528. <https://doi.org/10.1111/1467-9817.12353>
- Goodwin, A. P., Cho, S.-J., Reynolds, D., Brady, K., & Salas, J. (2020). Digital versus paper reading processes and links to comprehension for middle school students. *American Educational Research Journal*, 57(4), 1837–1867. <https://doi.org/10.3102/0002831219890300>
- Goodwin, A. P., Petscher, Y., Jones, S., McFadden, S., Reynolds, D., & Lantos, T. (2020). The monster in the classroom: Assessing language to inform instruction. *The Reading Teacher*, 73(5), 603–616. <https://doi.org/10.1002/trtr.1870>
- Reynolds, D., & Daniel, S. (2018). Toward contingency in scaffolding reading comprehension: Next steps for research. *Reading Research Quarterly*, 53(3), 367–373. <https://doi.org/10.1002/rrq.200>

Sara Rutherford-Quach

Principal Researcher

Summary

Sara Rutherford-Quach, PhD, is a principal education researcher with expertise in literacy and language instruction and teacher education, particularly with respect to multilingual students. She has led multiple large literacy evaluations and has managed several complex cross-institutional panels and projects. Her research has been published in both peer-reviewed journals and practitioner-focused products.

Representative Research Assignments at SRI (since 2018)

Senior Advisor, Evaluation of Structured Linguistic Phonics Instruction, funded by Reading Reimagined Project at the Advanced Education Research and Development Fund (AERDF), 2024–present. Advises PIs on evaluation design, client communication, and instrument content.

Principal Investigator, Evaluation of Alder Graduate School of Education Bilingual and Multilingual Pathways Project, Office for English Language Acquisition (OELA) National Professional Development (NPD) Grant, 2024–present. Leads team of researchers to implement case studies focused on Alder’s English language acquisition and bilingual residency pathways.

Principal Investigator, Evaluation of Reading Apprenticeship Literacy Learning (RA4ALL), U.S. Department of Education, Education Innovation and Research (EIR) Mid-Phase Grant, 2024–present. Leads randomized controlled trial (RCT) assessing the impact of RA4ALL (RA and foundational skills) on educators’ instructional practices and student achievement outcomes in 10 high-need districts across several states.

Senior Advisor, Urban District Literacy Collaborative (UDLC) Research Project, funded by the Schusterman Foundation, 2024–present. Advises PIs and task leads, particularly on classroom observations and on acting as site lead and observer for a large district.

Co-Lead, National Comprehensive Center Multilingual Learners Workgroup, 2023–24. Co-led group of researchers and technical assistance providers focused on multilingual learners across 19 federally funded regional comprehensive centers.

Principal Investigator, Evaluation of Reading Apprenticeship Professional Development Model, U.S. Department of Education EIR Mid-Phase Grant, 2021–present. Co-leads RCT assessing the impact of Reading Apprenticeship on teachers’ instructional practices and student achievement outcomes in 50 rural school districts. Leads instrument development, implementation, and the formative evaluation.

Principal Investigator, Evaluation of Bilingual/Biliterate Instruction for Bilingual Youth (BBILY). Office for English Language Acquisition (OELA) National Professional Development (NPD) Grant, 2021–present. Leads team of researchers to conduct RCT

Relevant Experience

- More than 20 years of experience leading and contributing to applied research and technical assistance to impact policies and practices.
- Expertise in literacy, language, instructional practice across disciplines, and teacher education.
- Specializes in multilingual learners.

Academic Background

- PhD, linguistic anthropology of education, 2013, Stanford University
- MA, cultural and social anthropology, 2010, Stanford University
- MA, social science in education, 2006, Stanford University
- BA, peace and global studies, Spanish, 2000, Earlham College

assessing the impact of online professional development modules on participating teachers' instructional practices and student achievement outcomes in two states. Leads formative evaluation of module utility and implementation with respect to both educator and caregiver participants.

Principal Investigator, Study of the Early Implementation of Los Angeles Unified School District's (LAUSD's) Primary Promise, 2022–24. Led study to assess the implementation and impact of LAUSD's early literacy and mathematics initiatives. Led research team to develop interview and survey instruments, collect and analyze data, and present findings to key stakeholders.

Co-Lead, Region 4 Comprehensive Center Bilingual Teacher Pipeline Project, 2020–21. Led team of researchers to provide technical assistance to New Jersey State Department of Education as it sought to widen its bilingual teacher pool and meet the needs of multilingual learners. Led development and presentation of reports to client as well as external publications.

Principal Investigator, Evaluation of Alpha Public Schools Charter Schools Program (CSP) Grant, 2019–24. Led evaluation of expansion strategy and enactment in a growing charter school organization. Led team to identify measurable indicators of model, develop and enact protocols and surveys to measure implementation, examine teachers' instructional practices and student outcomes, and present findings.

Implementation & Teacher Outcomes Lead, Evaluation of the Pathway to Academic Success Program, U.S. Department of Education EIR Expansion Grant, 2019–24. Studied the implementation and impact of a language arts program designed to support English learners in grades 7–12 to develop academic literacy skills in eight high-need school districts across the country. Led research team to use PLATO classroom observation tool.

Senior Team Member, Evidence-Based Practices for Teaching Phonological and Phonemic Awareness, 2018–19. U.S. Department of Education's Regional Educational Laboratory Appalachia (REL AP). Created targeted technical assistance resources on evidence-based literacy practices for REL AP partners.

Qualitative Lead, Scale-Up Evaluation of the College, Career, and Community Writers Program, funded by Investing in Innovation (i3) Grant, 2018–21. Designed protocols and led qualitative investigation for a national evaluation of a professional development program that spanned 46 rural districts in 10 states.

Senior Researcher, California State University (CSU), New Generation of Educators Initiative, 2018–20. Coordinated and conducted classroom observations and interviews of teacher candidates, co-teachers, principals, and program staff. Conducted data analysis for partner CSU campuses. Led development of formative report to clients and learning briefs for external audience.

Senior Researcher, California State University, Chico Teacher Quality (TQP) Grant, Promoting Rural Improvement in Secondary Mathematics and Sciences (PRISMS) Project, 2018–19. Developed protocols and conducted interviews and observations with residents, co-teachers, principals, and other stakeholders. Led analyses of interview data and contributed to reports.

Other Professional Experience

Director of Academic Initiatives & Research, Understanding Language, Stanford Graduate School of Education (SGSE), Stanford University, 2014–18. Designed, conducted, and disseminated mixed-methods research related to multilingual learner education. Developed

and expanded professional development portfolio from one course offering to more than 30, impacting more than 70,000 educators in 130 districts. Managed cross-institutional projects of 25+ people, including researchers, academics, educators, and policymakers. Provided professional development and technical assistance to states, districts, and school staff.

Postdoctoral Scholar, Understanding Language, Graduate School of Education, Stanford University, 2013–14.

Instructor, Graduate School of Education, Stanford University. Elementary Teaching Seminar: Formative Assessment, Language Policies and Practices, 2007–13.

Research Assistant, Center to Support Excellence in Teaching (CSET), Graduate School of Education, Stanford University, 2011–13. Protocol for Language Arts Teaching Observation (PLATO).

Literacy Center Director & Curriculum Developer, YES Reading [now called Reading Partners], Redwood City & East Menlo Park, CA, 2004–05.

Kindergarten & First-Grade Teacher, East Palo Alto Charter School – Aspire Public Schools, East Palo Alto, California, 2002–04.

Bilingual Kindergarten Teacher, R. P. Harris Elementary School, Houston, Texas, 2000–02.

Selected Publications and Presentations

Jennerjohn, A., Rutherford-Quach, S., & Cassidy, L. (2026, May 20). Decoding is not enough: Connecting word reading to meaning in early literacy. *The 74 Million*. <https://bit.ly/4uy8H6I>

Jennerjohn, A., Rutherford-Quach, S., Cassidy, L., Woodworth, K., Dec, S. & Reynolds, D. (2026). *Bridging the divide: Connecting word recognition and language comprehension in early literacy*. [Learning brief] SRI. https://www.sri.com/wp-content/uploads/2026/05/Cross-Site-Learning-Brief_Bridging_04302026-2.pdf

Sailors, M. Howlett, H. Erby, L. & Rutherford-Quach, S. (2026). Rural literacy in action: A multi-year program supporting ninth and tenth grade content area teachers in North Carolina. *Literacy Today*, 44(1). <https://lnkd.in/gm5peAT7>

Reynolds, D. Rutherford-Quach, S. & Cassidy, L. (2026, February 5). From tasks to meaning: How to make sure reading instruction goes deeper. *The 74 Million*. <https://www.the74million.org/article/from-tasks-to-meaning-how-to-make-sure-reading-instruction-goes-deeper/>

Schmidt, R. & Rutherford-Quach, S. (2025). *The impact of Reading Apprenticeship in North Carolina on student course grades*. [Summative brief] SRI. <https://disciplinaryliteracy.wested.org/our-approach/our-evidence-base/>

Reynolds, D., Rutherford-Quach, S., Cassidy, L., Jennerjohn, A., & Woodworth, K. (2025). *Beyond the surface: Leveraging high-quality instructional materials for robust reading comprehension* [Learning brief]. SRI. https://www.sri.com/wp-content/uploads/2025/11/Learning-Brief_11052025_Acc.pdf

Briceño, A., Rodriguez-Mojica, C., Rutherford-Quach, S., Ruiz, M., Stoehr, K., & Cao, Q. S. (2025). Translanguaging-informed beliefs and practices of Spanish-English middle school bilingual teachers upon completion of an online professional development. *Linguistics & Education*, 86, Article 101395. <https://doi.org/10.1016/j.linged.2025.101395>

Parker, C., Partika, A., & Rutherford-Quach, S. (2024). *Strengthening the teacher workforce to support multilingual learners: A tool for state educational agencies*. National Comprehensive Center at Westat.

- Rodriguez-Mojica, C., & Rutherford-Quach, S. (2024). Curricularizing language: Sentence stems as language-teaching pedagogy. In A. K. Kibler, A. Walqui, G. C. Bunch, & C. J. Faltis (Eds.), *Multilingual schools and communities: Celebrating the contributions of Guadalupe Valdés*. Multilingual Matters.
- Rodriguez-Mojica, C., Briceño, A., Rutherford-Quach, S., & Stoehr, K. (2024). Translanguaging formative assessment tools for bilingual teachers of multilingual students. *TESOL Journal*, 16(1), Article e914. <https://doi.org/10.1002/tesj.914>
- Nunn, S., Rutherford-Quach, S. & Schaefer, V. (2021). *Evidence-based practices for teaching phonological and phonemic awareness* [Memo]. REL Appalachia. https://ies.ed.gov/sites/default/files/migrated/rel/regions/appalachia/blogs/pdf/CoachingMemo_508.pdf
- Rutherford-Quach, S., Kelly, H., Torre Gibney, D., Ballen Riccards, J., & Parker, C. (2021). *Bilingual education: Lessons from Washington State*. Comprehensive Center Network. <https://eric.ed.gov/?id=ED653357>
- Rutherford-Quach, S., Thompson, K., Mojica-Rodriguez, C., & Román, D. (2021). Taking away excuses to quit: The role of structural supports in completion and learning within online professional development for teachers. *Online Learning Journal*, 25(2), 140–170. <https://doi.org/10.24059/olj.v25i2.1586>
- Rutherford-Quach, S., Torre Gibney, D., Kelly, H., Ballen Riccards, J., Garcia, E., Hsiao, M., Pellerin, E., & Parker, C. (2021). *Bilingual education across the United States*. Comprehensive Center Network. <https://eric.ed.gov/?id=ED653343>
- Rutherford-Quach, S., Torre Gibney, D., Kelly, H., Ballen Riccards, J., Garcia, E., Hsiao, M., Pellerin, E., & Parker, C. (2021). *Leveraging flexible teacher certification policies to address the bilingual teacher shortage*. Comprehensive Center Network. <https://eric.ed.gov/?id=ED653354>
- Torre Gibney, D., Kelly, H., Rutherford-Quach, S., Ballen Riccards, J., & Parker, C. (2021). *Addressing the bilingual teacher shortage*. Comprehensive Center Network. <https://eric.ed.gov/?id=ED653351>
- Arshan, N., Park, C. J., Rutherford-Quach, S., Milby, A., Torre-Gibney, D., & Woodworth, K. (2020, March 11-14). *Works in progress: Evaluation of the National Writing Project's College, Career, & Community Writers' Program (C3WP)*. Society for Research on Educational Effectiveness Spring Conference, virtual.
- Torre Gibney, D., Rutherford-Quach, S., Hirschboeck, K., & White, M. E. (2020). *Strengthening the clinical orientation of teacher preparation programs*. WestEd. <https://www.wested.org/resource/strengthening-clinical-orientation-of-teacher-preparation-programs/>
- Torre Gibney, D., Rutherford-Quach, S., Milby, A., Lam, A., & White, M. E. (2020). *Building strong partnerships to improve clinically oriented teacher preparation*. WestEd.
- Bunch, G. C., Schlaman, H., Rutherford-Quach, S., & Munoz-Munoz, E. (2019). Where the rubber hits the road: What teachers and students experience and learn when implementing high quality instruction for English learners. In A. Walqui & G. C. Bunch (Eds.), *Designing quality instruction for English learners in an era of new standards*. Teachers College Press.
- McDermott, R., Rutherford-Quach, S., & Steinbock, D. (2019). The work of learning from silence. In A. Edwards, M. Fleer, & L. Bottcher (Eds.), *Cultural-historical approaches to studying learning and development: societal, institutional, and personal perspectives*. Oxford University Press.

- Rutherford-Quach, S., & Hakuta, K. (2019). Bilingualism as action. In V. Grover, P. Uccelli, M. Rowe, & E. Lieven (Eds.), *Learning through language: Towards an educationally informed theory of language learning* (pp. 247–253). Cambridge University Press.
- Rutherford-Quach, S., Kuo, A., & Hsieh, H. (2018). Understanding their language: Online professional development for teachers of English Language Learners. *American Educator*, 42(3), 27–31, 40.
- Rutherford-Quach, S., Bunch, G., Schlaman H., & Munoz-Munoz, E. (2017, March). *Rethinking instruction for English Learners in the Common Core era: Findings from implementation of a pilot English Language Arts unit* [Paper presentation]. Annual Meeting of American Association of Applied Linguistics, Portland, OR, United States.
- Rutherford-Quach, S., & Rice, E. (2013). *Linked Learning in Sacramento: Organizing the district and community for sustainable reform*. California Linked Learning Case Studies Series. Stanford Center for Opportunity Policy in Education (SCOPE).
- Goldenberg, C., & Rutherford-Quach, S. (2012). Arizona home language survey: The under-identification of students for English language services. *Language Policy*, 11(1), 21–30. <https://doi.org/10.1007/s10993-011-9224-5>
- Goldenberg, C., & Rutherford-Quach, S. (2010). Instructing English Language Learners: Assessing the state of our knowledge. *ERS Spectrum*, 28, 1–15.

Louise Yarnall

Senior Research Social Scientist

Summary

Louise Yarnall, PhD conducts research focused on workforce development, career and college readiness, career pathways, adult success skills, and alignment between educational systems and labor market needs. Dr. Yarnall is experienced with assessment development, survey development and analysis, experimental and quasi-experimental design, outcomes evaluation, and the development of protocols for site visits and focus groups to support implementation evaluations. In particular, Dr. Yarnall has extensive experience working with education providers and workforce stakeholders to strengthen alignment between educational offerings (e.g., curricula, industry-recognized credentials) and regional and national labor market needs.

Representative Research Assignments at SRI (since 2000)

Principal Investigator, Badging ProSkills, a joint effort to design, test, and disseminate a professional skills microcredentialing program at Evergreen Valley College (East San Jose, CA) for both faculty and students, 2025–present. Faculty receive badges for completing online modules that help them embed professional skills lessons into their career technical education (CTE) courses. The three-year project involves research on how to facilitate and incentivize microcredential integration in community college courses and an external evaluation. The project will produce a collection of eight modules, four for faculty professional development and four for students. The modules will focus on teaching and learning of four professional skills: communication, teamwork, lifelong learning, and adapting to workplace expectations. This effort involves two advisory panels, one featuring badging experts from Wake Tech Community College (NC) and another featuring local industry partners. Resulting badges will align with national competency frameworks.

Senior Researcher, Postsecondary Teaching with Technology Collaborative, a U.S. Department of Education-funded research, development and capacity-building center studying technology-enabled instructional strategies to support self-directed learning in undergraduate gateway STEM courses, 2021–present. Involved coordination with the Community College Research Center (Teachers College, Columbia University), nine broad access postsecondary institutions, and the Achieving the Dream postsecondary education organization. Supported the design of the online tools for instructors to integrate into their courses, the development of the instructional model materials, and various project dissemination efforts.

Learning Scientist, Story Studio: Coaching Data Storytelling at Scale, a collaborative research project funded by the National Science Foundation's Research on Emerging Technologies for Teaching and Learning (RETTL) program, 2023–present. This project has developed a

Relevant Experience

- More than 20 years of experience in leading research on workforce development, career and college readiness, career pathways, adult success skills.
- Expertise in informal and formal education for secondary, post-secondary, and working adult learners.
- Specializes in in career-focused informal and formal education for secondary, post-secondary, and working adult learners with a focus on community college STEM technician programs.

Academic Background

- PhD, education, 2002, UCLA
- MA, education, 1998, UCLA
- BA, English, cum laude, 1984, UCLA

web-based tool that uses artificial intelligence technology to help postsecondary data science educators to use to support students in developing professional communication skills.

Principal Investigator, Project GOALS (Greater Opportunities to Advance Lifelong Success), a targeted research effort funded the National Science Foundation's Advanced Technological Education program with the San José-Evergreen Community College District (SJECCD), 2020–24. The project employed the method of research–practitioner partnership (RPP) to implement activities of professional development and educational materials adaptation and testing. Project GOALS featured three phases: (1) a co-design phase with faculty adapting and testing tools and techniques curated in past SRI research; (2) an implementation and measurement phase to test the RPP method for creating and implementing new curricula to teach employability skills and comparing growth in selected skills over one term versus multiple terms and contexts; and (3) a dissemination phase.

Research Technical Assistance Provider, Region 4 Comprehensive Center led by Policy Studies Associates, 2020–24. Co-led three efforts aimed at providing technical support for state and local educators: a K–16 work-based learning continuum framework and implementation guidelines for the state education agency of Maryland; a policy scan of methods educators can use to update industry-recognized credentials in career and technical education programs of study; and a report on programs districts can use to recruit and diversify future educators through secondary-level work-based learning programs.

Instructional Technical Assistance Provider, U.S. Department of Education's Regional Educational Laboratory Appalachia, 2023–26. In this work, centered in rural northeastern Tennessee, collaborated with a network of nine district CTE administrators to co-develop and test instruction that expands students' opportunities to develop professional skills. This work adapted the curriculum developed under Project GOALS.

Improvement Science Technical Provider, Fairmont State University and five other institutions of the First2 Alliance, an INCLUDES network funded by National Science Foundation, 2020–24. Supported college-level educators to establish and sustain a system of testing and sharing practices to improve rural postsecondary students' STEM graduation and employment rates.

Principal Investigator of the Employability Skills project, recently funded by the National Science Foundation's (NSF's) Advanced Technological Education (ATE) Employability Skills program, 2017–20. This work focused on a literature review/environmental scan of community college training. This project involved managing budget and research activities to gather, analyze, and report on the instructional methods and institutional supports that technician educators use to teach workplace professional skills effectively; conducting a formal research literature review; closely collaborating with leading U.S. community college and industry educators involved in delivering instruction in multiple fields (e.g., information technology, advanced manufacturing, and biotechnology); conducting stakeholder interviews in several technician fields; and, hosting a webinar and co-authoring a report geared toward community college and industry technician educators.

Workforce-education consultant, Pacific Regional Educational Laboratory, funded by the U.S. Department of Education, 2017–19. This work involved preparing and presenting two webinars to secondary and postsecondary educators on the need for educators to collaborate with local employers to strengthen opportunities for students to learn about the different industries in their region, the knowledge and skills valued by local employers, and the types of education and training qualifications that prepare them for employment.

Principal Investigator of the Community College Partnerships’ Instructional Impacts (CCPII), a targeted research project from 2009–15 supported by the Advanced Technological Education (ATE) program of the National Science Foundation (NSF). This applied research project, which focused on community college training, involved: using a multi-site case study methodology that involved collaborative research with 6 community colleges across the U.S. in information technology, advanced manufacturing, engineering technologies, and green energy; developing survey instruments for instructors and students; conducting stakeholder interviews with community college educators, workforce development leaders, industry partners, and students; facilitating structured focus groups that engaged both community college educators and industry representatives in reviewing the rigor and relevance of workforce education materials in information technology and advanced manufacturing; collaborating with a labor market analyst to examine the jobs for which community college programs prepared student, using the relevant Standard Occupational Classification Codes. Reviewing and representing recent regional labor market demand for those jobs (e.g., # employers seeking those skills, fields in which those skills are sought); and, leveraging past ATE work that resulted in the development of a [rating scale](#) of the quality of workforce instructional materials. *Key accomplishments:* [Publications](#) for both scholarly and general audiences; publication of reusable [protocols](#) to (a) evaluate quality of industry-college partnerships and (b) engage both industry and educators in reviewing the quality of instructional materials to develop valued workplace skills

Selected Publications, Presentations, and Commentary

- Yarnall, L., Yang, H., Ouyang, S., & Chen, L. K. (2026, February). Rethinking the Future of Data Science Education: A Case for Thoughtful Design to Integrate AI into the College Classroom. In *Proceedings of the 57th ACM Technical Symposium on Computer Science Education V. 1* (pp. 1180-1185).
- Yarnall, L. (2025, July 22). Putting learners in charge: A self-directed learning instructional model. *Postsecondary Teaching with Technology Collaborative Blog*. <https://postseccollab.org/putting-learners-in-charge-a-self-directed-learning-instructional-model/>
- Yarnall, L. (2025, July 3). Preparing technicians for professional success. *College & Career Pathways Blog*. <https://collegecareerpathways.org/preparing-technicians-for-professional-success/>
- Lundh, P., Yarnall, L., Smith, E., Krishnamachari, A., & Griffiths, R. (2024). *How to support career technical instructors to develop students’ professional skills* (Research brief). SRI International.
- Yarnall, L., Griffiths, R., & Cheever, H. (2023). *Teaching and designing online STEM courses to support self-directed learning*. SRI International. <https://postseccollab.org/teaching-and-designing-online-stem-courses-to-support-sdl-skills/>
- Yarnall, L., & Shaver, D. (2022). Supporting a rural, first-generation college improvement network. *College & Career Pathways*. <https://collegecareerpathways.org/supporting-a-rural-first-generation-college-improvement-network/>
- Booker-Dwyer, T., Friday, M., Griffin, J., Hildreth, J., Lauren, C., Cheever, H., Jonas, D., Kelly, H., Pellerin, E., Schaefer, V., & Yarnall, L. (2020). *Maryland’s work-based learning continuum: Describing the research and common practices*. Region 4 Comprehensive Center. https://www.marylandpublicschools.org/programs/Documents/CTE/Work-based Learning/MD_WBL_Continuum_Research_and_Common_Practices.pdf

- Cassidy, L., Garland, M., Jonas, D., & Yarnall, L. (2020). *Statewide evaluation of career and technical education programs: Final report*. SRI International.
- Warner, M., Yarnall, L., Ball, A., and Jonas, D. (2020). *Supporting and measuring career readiness: Hot topics, common challenges, and practical resources*. SRI International.
- Warner, M., Harris, J., Yarnall, L., Ball, A., and Jonas, D. (2019). *Measuring career readiness in high school literature scan*. SRI International.
- Yarnall, L., Denker, G., Fried, R., Carlton, J., Levin-Guracar, E., Peyton, S., Spaulding, A., Wingerden, K., & Senanayake, R. (2019, October). *Designing smartphone microlessons to improve the cybersecurity workforce*. Poster presented at the 4th NSF Secure and Trustworthy Cyberspace Principal Investigator Meeting, Alexandria, VA.
- Yarnall, L., Freed, M., & Malone, N. (2019). Self-regulated learning. In S. Schatz & J. J. Walcutt (Eds.), *Modernizing Distributed Learning. Force Education and Training under the Office of the Secretary of Defense*. https://www.researchgate.net/publication/333601547_Self-Regulated_Learning
- Yarnall, L. & Remold, J. (2019). *Working stronger and smarter: A handbook on theory and techniques for developing employability skills for technicians*. SRI International.
- Wilson, C., & Yarnall, L. (2018). *Untapped leaders: Faculty and the challenge of student completion*. League for Innovation in the Community College.
- Yarnall, L., Cassidy, L., Cox, M., Levin-Guracar, E., McMurchy, M., & Jonas, D. (2018). *Policy and literature review for the statewide evaluation of career and technical education programs*. SRI International.
- Yarnall, L., Snow, E., Snow, E., & Katz, I. R. (2017). Leveraging domain models for personalizing problem solving and learning. In R. A. Sottilare, A. C. Graesser, X. Hu, and G. A. Goodwin (Eds.) *Design Recommendations for Intelligent Tutoring Systems* (Vol. 5: Assessment Methods). Orlando, FL: Army Research Laboratory.
- Shechtman, N., Yarnall, L., Stites, R., & Cheng, B. (2016). *Empowering adults to thrive at work: Personal success skills for 21st century jobs. A report on promising research and practice*. Joyce Foundation. Retrieved from
- Yarnall, L., Tennant, E., & Stites, R. (2016). A framework for evaluating implementation of community college workforce education partnerships and programs. *Community College Journal of Research and Practice*, 40(3), 1-17. <https://doi.org/10.1080/10668926.2015.1101405>
- Yarnall, L., Tennant, E., & Stites, R. (2015). *A framework for evaluating implementation of workforce education partnerships and programs*. Research Brief. SRI International.
- Yarnall, L. (2014). Meeting 2020 workforce goals: The role of industry-college collaboration and goals for instructional design. *Community College Journal of Research and Practice*, 38(2-3). 250-260.
- Yarnall, L. & Ostrander, J. (2012). The assessment of 21st century skills in community college: Career and technician education programs. In Secolsky, C. (Ed.) *A handbook on measurement, assessment, and evaluation in higher education*. (pp. 277-295). New York, Routledge.
- Yarnall, L., Toyama, Y., Gong, B., Ayers, C., & Ostrander, J. (2007). Adapting scenario-based curriculum materials to community college technical courses. *Community College Journal of Research and Practice*, 31(7), 583-601.

Jenna Scott

Vice President, Education and Child Development

Experienced education technical assistance provider, policy expert, and evaluator working in areas across the cradle to career pipeline. Brings expertise in educator quality and effectiveness, human capital management, college and career readiness, family engagement, school choice, and strategic planning. Has strong ties to the mid-Atlantic region, working closely with the state of Maryland and Delaware on strategic priorities and school districts in Maryland and Pennsylvania on ESSA needs, and worked as a classroom teacher in Maryland. Over ten years' experience overseeing large portfolios of technical assistance and evaluation work to ensure quality assurance. Skilled at navigating goals and priorities of clients while ensuring high-quality work to maintain timeliness and efficiency.

Professional Experience

The Central Comprehensive Center, ED, NORC *Quality Assurance and Oversight, 2025 – Present*

The Central Comprehensive Center serves state education agencies in Colorado, Kansas, Missouri, Nebraska, North Dakota, South Dakota, and Wyoming. The Central Comprehensive Center teams collaborate with state education agency leaders across these states to identify priority areas, address their most pressing needs, and develop and implement practical solutions that improve teaching and learning while using resources effectively. For the project, provides quality assurance and oversight, and serves as a state co-lead building capacity in Missouri and South Dakota.

Blueprint for Maryland's Future Interim Evaluation, NORC *Co-PI, 2025 - Present*

The Maryland Governor's Office commissioned a rapid evidence review to inform implementation of the Blueprint for Maryland's Future, a statewide education reform effort aimed at improving student outcomes from early childhood through postsecondary education. NORC at the University of Chicago, has been contracted by Maryland's Accountability and Implementation Board, to conduct a study to understand the implementation of the Blueprint. Provide methodological oversight, guide evidence synthesis, ensure the quality and policy relevance of deliverables, and translate findings into actionable recommendations to inform implementation of the Blueprint for Maryland's Future for the Maryland Accountability and Implementation Board.

Washington Statewide Family Engagement Center Project, NORC *Quality Assurance Oversight, 2024 – 2025*

The Washington Statewide Family Engagement Center (WASFEC) is a newly formed collaborative center in Washington state. The center monitors progress and compliance with federal regulations, assesses

Education

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

M.A., Sociology (Quantitative Methods)
The Pennsylvania State University

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

Expertise

Project Management & Oversight

- Over 15 years directing capacity building projects and evaluation studies
- Over 10 years serving as quality assurance and oversight for portfolios of education-focused work

performance and implementation of its activities, and measures impacts on students and families. NORC is partnering with Education Northwest to independently evaluate family engagement programming and initiatives led by WASFEC.

Evaluation of the Regional Educational Laboratories, U.S. Department of Education (ED), Institute of Education Sciences (IES), Abt Global
Project Director, 2022 - 2024

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

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

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

Strategic Planning for the Bainum Foundation
Co-project director, 2021

The Bainum Foundation, located in Maryland, was committed to developing its strategic plan with a focus on community-centered impact. The Foundation developed a framework for the organization to use as it moved forward to ensure that community-centered practices were implemented and sustained in the organization. Collaborated with the Bainum Foundation to embed community-centered practices in its strategic plan, develop tools to monitor implementation and sustainability, and contribute insights to its organizational learning agenda.

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

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

Professional History

NORC at the University of Chicago
2024 - Present

- *Vice President*

Abt Global

- *Education Account Lead*
2022 - 2024

Westat

- *Principal Associate*
2008 – 2015; 2016- 2022

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Claudia Gentile

Senior Fellow

Claudia Gentile, PhD, is a senior fellow in the Education and Child Development department at NORC. Gentile has over 25 years of experience leading national, state and local evaluations of educational programs, with a special emphasis on capacity building and technical assistance, enhancing the technical quality of studies through the development of valid and reliable instruments, including surveys, protocols and classroom observations. Dr. Gentile has provided technical assistance and training to SEAs, school districts, university research centers and nonprofit education agencies in over 15 states on innovations in literacy instruction and assessment, uses of technology and family outreach programs to improve students' achievement, innovations in teacher evaluation and professional development and school leadership. Dr. Gentile has extensive experience leading evaluation studies, including implementation studies that involve providing rapid feedback to schools and agencies to support program improvement, with a special emphasis on working with stakeholders to interpret and use quantitative outcomes data for the improvement of programs and policies.

NORC Experience

Central Comprehensive Center US Department of Education *Project Lead*

The Central Comprehensive Center serves state education agencies in Colorado, Kansas, Missouri, Nebraska, North Dakota, South Dakota, and Wyoming. The Central Comprehensive Center teams collaborate with state education agency leaders across these states to identify priority areas, address their most pressing needs, and develop and implement practical solutions that improve teaching and learning while using resources effectively. Works with the Director to provide strategic and operational leadership, overseeing state project coordination, reporting and continuous improvement systems, and alignment with federal priorities and performance measures. Co-leads projects with multiple state education agencies (Nebraska, Wyoming, North Dakota, South Dakota) in the areas of assessment innovations and literacy.

Landscape of US History Teachers, Grades 7 to 12, American Historic Association *Task Lead, 2022 - Present*

Leads the development of a survey of US History teachers, grades 7 to 12, to capture information about the range of ways they teach US History, the areas they emphasize and the influences they experience in today's heightened focus on US History.

Teen Math Mindset Study, Gates Foundation *Project Director, 2021 - Present*

Leads a survey study of teenagers' views on math, their experiences studying math, and their opportunities to take higher level math courses,

Education

Ph.D., English Education, 1998
Syracuse University

M.A., English Education/TESOL, 1983
New York University

B.A., English Literature, 1979
Goucher College

Expertise

Literacy Education

- Literacy theory and research
- PK-12 literacy standards, curriculum, instruction and assessment

School Leadership and Reform

- School Improvement/Systems of Support
- Teacher evaluation and professional workforce development
- Career Pathways
- School leader professional development
- District reforms: needs analyses, implementation support, monitoring progress

Evaluation Study Design & Leadership

- Implementation evaluations to support program improvement
- Outcomes evaluations (QEDs, RCTs): local and large-scale
- Measures development (surveys, protocols for observations, interviews and focus groups, performance tasks & rubrics, document analysis rubrics)
- Dissemination of findings (reports,

including survey development, testing, and administration via NORC's AmeriSpeak Teen Panel. Information from surveys of teens and parents will help inform efforts to improve math outcomes for BIPOC students.

Generation Citizen Evaluation Study, IES

Project Director, 2021 - Present

Provides leadership in instrument design and development, district recruitment and on boarding, and data collection and analysis for an RCT evaluation of Generation Citizen's action civics program implemented in Philadelphia and Los Angeles school districts.

Literacy Framework Implementation Review, Fulton County School District (Georgia)

Senior Advisor, 2021 - 2022

Provided expertise in instrument design to team interviewing school administrators about implementation issues for the district's K-12 Literacy Framework. Conducts interviews with school leaders and teachers.

Evaluation of Engaging Youth for Positive Change Civics Program, Robert Wood Johnson Foundation

Senior Advisor, 2020 - 2022

Provided expertise in analyzing and presenting preliminary survey data for an RCT evaluation of EYPC implementation in rural districts in Illinois; and in developing a new study design to accommodate pandemic-related issues.

Pandemic Learning Loss in US High Schools: A National Examination of Student Experiences, National Science Foundation

Senior Advisor, 2020 - 2022

Provided expertise in survey design, analysis and reporting of survey data on the challenges students faced in studying STEM subjects during the pandemic.

Tools for Assessing Higher Education Institutions Gates Foundation

Task Lead, 2018-2019

Led a technical review of rubrics designed to capture key drivers of academic success across higher education institutions and the degrees to which these drivers are equitably implemented. Met with leaders at higher education institutions, conducted reviews and recommended revisions to suit the needs of multiple stakeholders.

Kid Writing Evaluation Study, William Penn Foundation

Evaluation Director, 2017 - present

Leads implementation and outcomes evaluation studies of the Philadelphia Writing Project's early childhood writing program (Kid Writing) and its implementation in Philadelphia. The program includes teacher professional development, instructional resources, on-line support as well as a family component that includes training parents to use Kid Writing with their children, family library visits, and family literacy events.

Professional History

NORC at the University of Chicago 2017 - Present

- *Senior Fellow, Education and Child Development*
2017 - present

Mathematica Policy Research

- *Associate Director, Survey & Information Services Division*
2009 – 2017

The Regional Training Center

- *Instructor, Graduate School of Education*
2006 - present

The College of New Jersey

- *Instructor, Graduate School of Education*
2005 - 2009

Educational Testing Service

- *Research Scientist*
1998 - 2005
- *Director of Scoring, NAEP*
1992 - 1997
- *Test Developer, Literacy Assessments*
1988 - 1991

Reading and Language Arts Dept. Syracuse University

- *Adjunct Instructor, Literacy Research and Instruction*
1986 - 1988

English Department, International Christian University

- *Lecturer, ESL/EFL*
1983 - 1985

Other Professional Experience

Expeditionary Learning Teacher Potential Project

Project Director, 2014 - 2017

Directed an i3 random control trial study to evaluate the implementation and impacts of EL Education's Teacher Potential Project on novice teachers and their students in English/Language Arts classes in grades 4-8. (\$5 million; study team of 12; 40 data collectors). Data included a web survey of teachers about their instructional practices, exit surveys after PD workshops, classroom observations and student state assessment data. Successfully overcame challenge of recruiting districts for an RCT when study involved implementing a new year-long ELA curriculum.

Measure to Learn and Improve (MLI) Study

Project Director, 2014-2016

Directed the development and pilot testing of teacher, principal, and school district surveys for the Bill & Melinda Gates Foundation's MLI project, to collect information about implementation of key educational reform efforts (college-ready standards, teacher evaluation and professional development, digital and personalized learning). Evaluated state student assessment data and developed procedures to collect and rubrics to evaluate artifacts (such as school curricula and classroom assignments) for alignment to the Common Core state standards. Met with State Education Agencies in Massachusetts, Oklahoma, Colorado and California to facilitate review and revision of surveys. Directed the analysis of survey data from multiple states to address a range of questions about implementation of reform efforts.

Pittsburgh Classroom-Based Assessment Project

Project Director, 2012-2015

Directed an analysis and evaluation of classroom-based assessments, (mathematics and English/language arts, grades 3-12; science and social studies, grades 6-12), including item formatting, sensitivity, and alignment with state and Common Core standards. Provided professional development workshops to Pittsburgh City School teachers and staff to improve the quality of their assessments and provided curriculum alignment analyses of test items with Pittsburgh's curriculum.

Kauffman School Evaluation Study

Project Director, 2011 - 2017

Directed an evaluation of the first five years of the Kauffman Charter School (grades 5-12), including a quasi-experimental study of the school's impact on students' attendance, discipline and achievement. (\$5 million; study team of 5; 20 data collectors). Also included an implementation study that provided formative feedback three times a year on the lessons learned from on-site interviews, focus groups, classroom observations, and surveys of teachers, administrators, students, and parents.

National Title I Study of Implementation and Outcomes: Early Childhood Language Development (Pre-K-Grade 3)

Project Director, 2009 - 2017

Directed a national study exploring which teaching practices and instructional programs correlate to growth in children's language development, background knowledge, and comprehension. (\$15 million; study team of 30; two subcontractors; over 200 data collectors). The sample included 1,000 classrooms at 83 Title I elementary schools in 10 school districts across the country (grades prekindergarten through 3). Data included teacher and principal surveys, individually administered student assessments, and intensive classroom observations.

Community College Developmental Writing Study

Project Director, 2004-2005.

Directed an RCT evaluation of the use of ETS' web-based writing tool (Criterion) for developmental writing classes at 12 community colleges in four states. Oversaw the evaluation design, recruitment of colleges and faculty, and development of faculty surveys.

ETS/District of Trenton Partnership for School Improvement*Principal Investigator, 2003 - 2006*

Served as lead researcher for ETS's capacity-building initiative with the Trenton, New Jersey High School, to support ongoing district reform efforts. Provided technical assistance on the use of assessment data, innovations in instruction, and family outreach programs to improve graduation rates and transitions to college. Conducted interim evaluations of special programs in mathematics, technology and writing, and teacher professional development. Modified the study design as needs evolved across the three years of the initiative to address new questions that emerged.

Princeton Center for Leadership Training/School Improvement.*Technical Assistance Provider, 2003 - 2006*

Provided technical assistance to New Jersey urban districts (Jersey City, Newark, Trenton) as part of large-scale school reform efforts, including providing training in innovations in instruction and assessment; data analysis support services for interpreting survey, assessment and administrative data to develop reform plans and monitor their progress.

Early Childhood Literacy Profiles.*Director of Scoring, 2004 - 2005*

Provided technical expertise to the New Jersey and New York State Departments of Education in the design and development of their early literacy profiles, a portfolios approach to collecting evidence of early childhood literacy development, pre-K to grade 1.

New York City School District Writing Across the Curriculum Study*Technical Director, 1988-92*

Led the design, collection and analysis of student surveys to evaluate the effectiveness of a National Writing Project writing across the curriculum program. Prepared study briefs and slide decks. Funded by Chase Manhattan Bank.

NAEP*Director of Scoring and Trend Reporting, 1992 - 1997*

Oversaw the training and scoring of constructed response items, conducted at National Computer Systems facility in Iowa City, for all NAEP assessments (Reading, Mathematics, Writing, U.S. History, World Geography, Science and the Arts). Served as coordinator for three trend reports (1992, 1994, and 1996). Authored six NAEP reports, including two trend reports, two report cards, and two reports designed for teachers and school leaders on innovations in classroom-based writing, and a guidebook of fun writing activities for parents to do with their children.

Publications

Katie Mathew, Vera Lee, Tylor Mengel & Claudia Gentile. "Empowering Young Children's Literacy Development Through Writing" in the Handbook of Research on Writing Instruction: Practices for Equitable and Effective Teaching. Tracey Hodges, Editor. IGI Global Publishing 2022.

Lisa Lee, Cynthia Simko, & Claudia Gentile. "Cognitive Interviewing and Pilot Studies," in Basic Elements of Survey Research in Education: Addressing the Problems Your Advisor Never Told You About. Ulemu Luhanga and Gregg Allen, eds. Charlotte, NC: Information Age Publishing, 2020.

Gentile, Claudia. "Analytic Scoring," "Information Processing Theory," and "Kindergarten," Encyclopedia of Research in Educational Measurement, SAGE, 2018.

Johnson, Matthew, Richman, Scott, Jacob-Johnson, Cleo, Halen, Alicia, and Gentile, Claudia. "The Educational and Behavioral Impacts of the Kauffman Charter School," Journal of School Choice, vol 11, issue 3, 2017.

Chiang, H., Walsh, E., Shanahan, T., Gentile, C., Maccarone, A., Waits, T., Carlson, B., & Rikoon, S. (2017). "An Exploration of Instructional Practices that Foster Language Development and Comprehension: Evidence from Prekindergarten through Grade 3 in Title I Schools (NCEE 2017-4024)". Washington, DC: National Center for Education Evaluation and Regional Assistance, Institute of Education Sciences, U.S. Department of Education.

Boris Granovskiy

Research Scientist

Boris Granovskiy is a research scientist in the Education and Child Development department at NORC. Boris has twelve years of experience in K-12 education policy, technical assistance, and qualitative and quantitative research. This includes supporting state and local education agencies in Louisiana, Texas, Virginia, Colorado, South Dakota, and Wyoming by leading capacity building and technical assistance efforts around chronic absenteeism, literacy, education funding, and school improvement for three regional comprehensive centers. Boris also has extensive expertise supporting Congressional policymakers with objective, nonpartisan policy analysis and writing, including serving as Congress' go-to expert on student pathways and college and career readiness. He has a broad range of analytical skills, including peer-reviewed publications on agent-based modeling approaches in the natural and social sciences, and deep understanding of the current and evolving landscape of the use of artificial intelligence in K-12 classrooms.

NORC Experience

Central Comprehensive Center

Project Lead, 2026-present

The Central Comprehensive Center serves state education agencies in Colorado, Kansas, Missouri, Nebraska, North Dakota, South Dakota, and Wyoming. The Central Comprehensive Center teams collaborate with state education agency leaders across these states to identify priority areas, address their most pressing needs, and develop and implement practical solutions that improve teaching and learning while using resources effectively. Co-leads capacity building and technical assistance efforts for the Colorado, South Dakota, and Wyoming Departments of Education on topics including chronic absenteeism, literacy plan implementation, and mathematics instructional framework development.

Other Professional Experience

DataAnnotation Tech

Freelance Education and AI Specialist (remote position), 2025-2026

- Trained and evaluated AI language models to improve accuracy and usability of tools designed for educational and classroom applications.
- Contributed subject matter expertise to enhance AI-powered instructional resources, ensuring pedagogical soundness, alignment with learning objectives, and practical classroom relevance.

Westat, Rockville, MD

Senior Research Associate (remote position), 2021-2025

- Served as Portfolio Manager for College and Career Readiness for the Southwest Regional Comprehensive Center

Education

Ph.D., Mathematical Biology

Uppsala University, Uppsala Sweden, 2008-2013

- Thesis: Modeling Complex Decision-Making by Animal Groups

M.S., Computer Science

Uppsala University, Uppsala Sweden, 2005-2007

- Coursework completed in June 2007

B.A., with honors in Applied Mathematics

Harvard University, Cambridge, MA 1998-2002

Expertise

Content Expertise

Capacity Building and Technical Assistance, Workforce Developments, Education Technology, Federal K-12 Education Policy, Workforce Development and Career Pathways, Mathematics and STEM Instruction, SEA and LEA Leadership Development, Chronic Absenteeism, Family Engagement

Kotter Change Management Certification (2024)

Programming Languages and Analysis Tools

R, Stata, Excel, Python, Google Workspace, Smartsheet

Languages: English (native); Russian (native); Swedish (fluent)

- Served as Virginia Co-Lead for the Appalachia Regional Comprehensive Center
- Led a data cleaning and analysis team for a large-scale longitudinal study of long-term academic outcomes for English Learners
- Managed and led multiple technical assistance projects from design to implementation for clients such as the Louisiana, Virginia, and Arkansas Departments of Education
- Supported the Louisiana Department of Education in creating an online dashboard for reporting COVID-19 relief funding and academic outcomes
- Co-led a Networked Improvement Community of state and district leaders for the Virginia Department of Education's Office of School Improvement
- Led stakeholder engagement and coordinated comments on a series of state policy proposals for the Virginia Department of Education
- Contributed extensively to business development efforts, including successful bids for multiple Regional Comprehensive Centers

Congressional Research Service, Library of Congress, Washington, DC
Analyst in Education Policy, 2015-2021

- Provided timely nonpartisan written and oral policy analysis to members of Congress and their staff on a wide variety of topics within federal education and workforce development policy
- Served as lead analyst on career and technical education, postsecondary transitions, correctional education, federal education funding, remote learning and educational technology, STEM education, education of English Learners, and education of homeless students
- Founded and led the Education & Labor Quantitative Analysis team
- Authored written products including full-length research reports, analytical memos, and topical briefs for members of Congress
- Responded to urgent requests from Congress under tight deadlines
- Managed competing priorities from multiple clients
- Coordinated, implemented, and reviewed multiple substantial analytical projects involving multiple authors
- Mentored junior analysts and interns and provided suitable projects for their development

John W. Kluge Center, Library of Congress, Washington, DC
Acting Supervisory Program Specialist, March-June 2020

- Served a detail as part of the Library of Congress' Leadership Development Program
- Supervised a team of three program specialists
- Was responsible for rapidly retooling the Kluge Center's public program offerings to include remote and web-based programs during the COVID-19 pandemic
- Led the effort to draft and adopt a new strategic plan for the Kluge

Professional History

NORC at the University of Chicago

- *Research Scientist (2026-present)*

DataAnnotation Tech

- *Freelance Education and AI Specialist*
2025-present

Westat, Rockville, MD

- *Senior Research Associate*
2021-2025

Congressional Research Service, Library of Congress, Washington, DC

- *Analyst in Education Policy*
2015-2021

John W. Kluge Center, Library of Congress, Washington, DC

- *Acting Supervisory Program Specialist*
March-June 2020

American Mathematical Society/American Association for the Advancement of Science, Washington, DC

- *AAS Science & Technology Policy Congressional Fellow sponsored by the American Mathematical Society*
2014-2015

Institute for Futures Studies, Stockholm, Sweden

- *Postdoctoral researcher in collaboration with the Swedish Association of Local Governments*
2013-2014

Stuyvesant High School, New York, NY

- *Teacher of mathematics and computer science*
2002-2005

Center

- Developed strategic partnerships with academic and cultural institutions to attract world-class scholars to Kluge Center residence programs

American Mathematical Society/American Association for the Advancement of Science, Washington, DC

AAS Science & Technology Policy Congressional Fellow sponsored by the American Mathematical Society, 2014-2015

- Served as a federal education policy adviser on Senator Franken's legislative team
- Led the successful effort to include legislation on computer adaptive assessments, the STEM Master Teacher Corps, and Native Language Assessments into the Every Student Succeeds Act
- Participated in bipartisan negotiations with Senate HELP Committee staff throughout the ESEA reauthorization process
- Drafted and introduced multiple pieces of legislation
- Met with numerous constituents and stakeholders and discussed their education policy priorities at the state and federal levels

Institute for Futures Studies, Stockholm, Sweden

Postdoctoral researcher in collaboration with the Swedish Association of Local Governments, 2013-2014

Mathematical modeling of factors affecting the spread of mental health problems in the schools

- Designed, carried out, and analyzed data from studies examining the effectiveness of the allocation of government funds for mental health in Swedish schools
- Created and tested mathematical models that made predictions about the spread of socially contagious behavioral problems and mental health disorders in Swedish schools

Stuyvesant High School, New York, NY

Teacher of mathematics and computer science, 2002-2005

- Developed curriculum for and taught Honors Euclidean Geometry and Introductory Computer Science

Assistant Coach to nationally ranked mathematics team

Publications

Granovskiy, B., Silva, M., & Wills, K. (2024). Topical brief: State approaches to parent/family engagement. Region 5 Comprehensive Center.

Granovskiy, B. (2023). Topical brief: Promoting career pathways. Region 5 Comprehensive Center.

Zota, R. R., & Granovskiy, B. (2021). Remote learning for K-12 Schools during the COVID-19 pandemic. Congressional Research Service.

Granovskiy, B., & Wilson, J.H. (2019). Foreign STEM students in the United States. Congressional Research Service.

Granovskiy, B. (2018). Science, technology, education, and mathematics (STEM) education: An overview. Congressional Research Service.

Granovskiy, B. (2018). Reauthorization of the Perkins Act in the 115th Congress: The Strengthening career and technical education for the 21st Century Act. Congressional Research Service.

Bradley, D.H., & Granovskiy, B. (2018). Measuring job openings in the U.S. labor market. Congressional Research Service.

Granovskiy, B. (2017). Challenges in cybersecurity education and workforce development. Congressional Research Service.

Robert Meyer

Senior Fellow

Dr. Meyer is a Senior Fellow and provides capacity building and technical assistance to schools and leaders around the United States. Prior to joining NORC in 2024, Rob was a research professor at the University of Wisconsin-Madison. He founded and directed the Value-Added Research Center at UW-Madison where he pioneered the use and delivery of high-quality analytics and tools to support American educational systems. In collaboration with university colleagues, he founded and served as CEO and president of Education Analytics, a non-profit organization designed to scale the delivery of educational statistics nationwide.

Rob is known for his research on and implementation of value-added growth models, human capital analytics, early warning/early opportunity systems, and program evaluation. He developed major research partnerships with many school districts, including Atlanta, Chicago, Hillsborough County, Los Angeles, Milwaukee, Minneapolis, New York City, and Tulsa; states, including Delaware, Minnesota, New York, South Carolina, and Wisconsin; and regional collaboratives, including CORE. His latest research focuses on the use of AI to enable educator and policy maker engagement with education and youth data and analytics.

Rob was a first-round recipient of a Senior Urban Education Research Fellowship from the Council of Great City Schools, received the UW-Madison Chancellor's Award for Excellence in Research, was named a Moneyball for Government Non-Profit All-Star by Results for America, and was selected into Edu Dream's K12 Research for his prior work..

NORC and Prior Experience

Central Comprehensive Center

Project Lead, 2025-present

The Central Comprehensive Center serves state education agencies in Colorado, Kansas, Missouri, Nebraska, North Dakota, South Dakota, and Wyoming. The Central Comprehensive Center teams collaborate with state education agency leaders across these states to identify priority areas, address their most pressing needs, and develop and implement practical solutions that improve teaching and learning while using resources effectively. My major project involves working with states to identify and evaluate potential innovations in state assessments and accountability systems. States need assessment systems that serve multiple purposes, such as providing valid and reliable measures of student achievement and growth for accountability and supporting educators with timely information for instruction. States hope to satisfy these objectives without increasing test burden, which is a challenge—assessments designed for accountability need to be standardized, broad in scope, and precise; while instructionally focused assessments need to be flexible, targeted, and fast. We are working with states to consider different types of assessments that best satisfy these objectives. We are also researching approaches to reduce test burden by more efficiently

Education

Ph.D., Public Policy

Harvard University

M.P.P., Public Policy

Harvard University

B.A., Economics

Harvard College

Expertise

Econometrics & Advanced Quantitative Methods

Psychometrics & Assessment

Growth and Value-Added Models, School and Teacher Accountability

Evaluation & Research Design

Training & Technical Assistance

Literacy Instruction (preK-12)

Math/STEM Instruction (preK-12)

Teacher/Educator Workforce Development

AI/Education Technology

Rural Education

Data Systems Design & Support

School Improvement/Systems of Support

Workforce Development/Career Pathways

School Funding/Resource Allocation

Chronic Absenteeism

combining data from summative and interim assessments and assessments from multiple years, especially when measuring student growth.

The Education Analytics for Students and Educators (EASE) System: Reenvisioning Early Warning, Goal Setting, and School Accountability Systems Powered by AI (multiple projects)

Principal Investigator, 2022 - Present

The goal of this project is to build and implement EASE, a smart, AI-powered platform to help schools use data to improve student outcomes. EASE brings together five key processes—early warning, goal setting, action, evaluation, and accountability—into one easy-to-use system. While some schools use parts of this approach, no one has combined them into a single, integrated tool. EASE uses predictive analytics and AI to give teachers, principals, and district leaders real-time, personalized insights. It also helps them identify struggling students, set goals, choose the right supports, and track progress. The research draws on extensive data sets from large urban school districts.

An Evaluation Generator Powered by AI

Principal Investigator, 2022 - Present

This project aims to build the statistical tools to allow schools and districts to use the data that they already have to design interventions and evaluate their effects on multiple student outcomes. The tool is powered by AI, thereby enabling users to efficiently and intelligently select desired student outcomes, select appropriate controls, and define appropriate comparison groups. AI essentially acts as a consultant to the user. The tool is designed to solicit information from the user to identify possible threats to the validity (potential bias and imprecision) and to recommend application of statistical models that best address these threats.

New York City Teacher and School Quality Research (series of projects)

Principal Investigator, 2009 – Present

This series of projects involved collaborative research with the district on development of statistical models and associated software to construct measures of school quality based on multiple student outcomes, including student attendance, course taking, student grades, and test scores. The research applies predictive analytics methods to evaluate student outcomes in middle and high school in terms of predicted high school graduation status (non-graduate, Regents diploma, and Advanced Regents diploma) and predicted college enrollment and graduation.

Selected Publications and New Working Papers

Meyer, R.H. (2025). Controlling for Measurement Error in Evaluation Models When Treatment Group Assignment is Based on Noisy Measures: Evaluation of an Achievement Gap-Closing Initiative, *EdWorking Paper No. 25-1291*, Annenberg Institute.

Meyer, R.H.; Milanowski, A.; Veiga, R.; Doherty, J. (2025). Creating Actionable Human Capital Analytics for Studying School-Level Teacher

Professional History

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

Education Analytics, Madison, WI

- *Founder (CEO and President)*
2012-2024

University of Wisconsin-Madison

- *Emeritus Research Professor*
2018-Present
- *Research Professor*
2009-2017
- *Director, Value-Added Research Center*
2005-2017
- *Research Scientist, Wisconsin Center for Education Research*
1998-2009
- *Instructor & Assistant Professor, Economics Department and La Follette Institute of Public Affairs*
1989-1992

Harris Graduate School of Public Policy, University of Chicago

- *Assistant Professor*
1992-1998

National Assessment of Vocational Education, U.S. Department of Education

- *Senior Economist*
1986-1989

The Brookings Institution

- *Research Associate*
1983-1986

Council of Economic Advisers

- *Staff Economist*
1982-1983

- Retention, *Journal of Education Human Resources*, Vol. 43, No. 2, DOI: 10.3138/jehr-2023-0063
- Bolt, D.; Wang, Y.W.; Meyer, R.; Pier, L. (2020). An IRT Mixture Model for Rating Scale Confusion Associated with Negatively Worded Items in Measures of Social-Emotional Learning, *Applied Measurement in Education*, 33(4), 331-348. <https://doi.org/10.1080/08957347.2020.1789140>
- Ponisciak, S.M.; Meyer, R.H.; Brown, A.; Schatzberg, T. (2020). Trade-Offs in the Implementation of Observational Ratings Systems, *Journal of Applied Measurement*, 21(1), 2020, 50–67.
- Goodson, B. et al (2019). *Teacher preparation experiences and early teaching effectiveness*, (NCEE 2019-4007). Washington, DC: U.S. Department of Education, Institute of Education Sciences, National Center for Education Evaluation and Regional Assistance. Retrieved from: <https://ies.ed.gov/ncee/pubs/20194007/>
- Gawade, N.G.; Meyer, R.H. (2016). Measuring Teacher Effectiveness Using Value-Added Models of High School Achievement, *Teachers College Record*, Volume 118, Number 13, 2016, p. 1-32.
- Meyer, R.H.; Carl, B. (2015). Principal Effectiveness and School Accountability, *La Follette Policy Report*, Volume 24, Number 2, Spring 2015, pp. 16-20.
- Meyer, R.H.; Dokumaci, E. (2015). Value-Added Models and the Next Generation Of Assessments, in Lissitz, Robert W. (ed.), *Value added modeling and growth modeling with particular application to teacher and school effectiveness*, Charlotte, NC: Information Age Publishing.
- Carl, B.; Richardson, J.T; Cheng, E.; Kim, H.; Meyer, R.H. (2013). Theory and Application of Early Warning Systems for High School and Beyond, *Journal of Education for Students Placed at Risk*, Vol. 18, No. 1, 2013.
- Heinrich, C.; Meyer, R.H.; Whitten, G. (2010). Supplemental Education Services under No Child Left Behind: Who Signs Up, and What Do They Gain? *Education Evaluation and Policy Analysis*, Vol. 32, No. 2, pp. 273–298.
- Greenberg, D.; Meyer, R.H.; Michalopoulos, C.; Wiseman, M (2003). Explaining Variation in the Effects of Welfare-To-Work Programs, *Evaluation Review*, Vol. 27, no. 4, pp. 359-394.
- Meyer, R.H. (1999). The Production of Mathematics Skills in High School: What Works?" in Mayer, Susan and Peterson, Paul (eds.), *Earning and Learning: How Schools Matter*, Washington, DC: Brookings Institution, pp. 169-204.
- Meyer, R.H. (1996). Value-Added Indicators of School Performance," in Hanushek, Eric A. and Jorgenson, Dale W. (eds.), *Improving the Performance of America's Schools*, Washington, DC: National Academy Press, 1996, pp. 197-223. A modified version of this paper was published as "Value-Added Indicators of School Performance: A Primer," *Economics of Education Review*, Vol. 16, No. 3, June 1997, pp.283-301.
- Greenberg, D.; Meyer, R.H.; Wiseman, M. (1994). Multisite Employment and Training Program Evaluations: A Tale of Three Studies, *Industrial and Labor Relations Review*, Vol. 47, No.4, pp. 679-691.
- Meyer, R.H.; Wise, D. (1984). The Transition from School to Work: The Experiences of Blacks and Whites" (with David Wise), in Ehrenberg, R. (ed.), *Research in Labor Economics*, Vol. 6, JAI Press, Inc., pp. 123-176.
- Meyer, R.H.; Wise, D. (1983). Discontinuous Distributions and Missing Persons: The Minimum Wage and Unemployed Youth" (with David Wise), *Econometrica*, Vol. 51, No. 6, pp. 1677-1698.
- Meyer, R.H.; Wise, D. (1983). The Effects of the Minimum Wage on the Employment and Earnings of Youth. *Journal of Labor Economics*, Vol. 1, No. 1, University of Chicago Press, pp. 66-100.
- Meyer, R.H.; Wise, D. (1982). High School Preparation and Early Labor Force Experience, in R. Freeman and D. Wise, *The Youth Labor Market Problem: Its Nature, Causes, and Consequences*, National Bureau of Economic Research, Chicago: University of Chicago Press, pp. 277-347.

Recent Presentations

- Meyer, R.H. (2026). Educational Analytics and Their Use Powered by AI, Paper presented at the Association for Education Finance and Policy Annual Meeting, Chicago, March 19, 2026.
- Christian, M.S.; Meyer, R.H. (2024) Error in School Growth Measures from Published, Aggregated Assessment Data, paper presented at the Association for Education Finance and Policy Annual Meeting, Baltimore, March 16, 2024.

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- Meyer, R.H.; Christian, M.S. (2023). Controlling for Measurement Error in Evaluations When Treatment Group Assignment is Based on Noisy Measures, paper presented at the Society for Research on Educational Effectiveness, Arlington, September 27, 2023.
- Meyer, R.H, Hu, S; Christian, M.S. (2023). Learning Loss and Recovery During the Coronavirus Pandemic, paper presented at the Society for Research on Educational Effectiveness, Arlington, September 30, 2023.
- Meyer, R.H. (2022). Innovations in Value Added – Measuring Growth for Low Achieving Students,” Keynote address at the Florida Education Research Association Conference, Daytona Beach, November 17, 2022.
- Meyer, R.H.; Christian, M.S. (2022). Closing the Gap in Student Achievement: Application of the Augmented Errors-in-Variables Method, paper presented at Society for Research on Educational Effectiveness, Arlington, September 22, 2022.
- Ponisciak, S.; Meyer, R.H. (2021). Trade-Offs in the Implementation of Observational Ratings Systems II: Middle School and High School, Papers presented at the Association for Education Finance and Policy Annual Meeting, Virtual, March 17-20, 2021.
- Meyer, R.H.; Dominitz, J.; Kim, S. (2020). Predictive and Contingent Analytics to Assess Risk and Strategies to Improve Educational Outcomes, Paper presented at the Annual Meeting, Virtual, March 19-21, 2020.

Jaunelle Pratt-Williams

Principal Research Scientist

Jaunelle Pratt-Williams brings specialized professional competence in non-academic supports research for postsecondary transitions; cost analysis; school finance policy analysis; education policy analysis; program evaluation; quantitative data collection and analysis including quasi-experimental analysis; qualitative data collection and analysis including interviews and focus groups; capacity building and technical assistance; and project management.

Representative Research Assignments at NORC

Central Comprehensive Center funded by the U.S. Department of Education

Project Lead, 2025-present

The Central Comprehensive Center serves state education agencies in Colorado, Kansas, Missouri, Nebraska, North Dakota, South Dakota, and Wyoming. The Central Comprehensive Center teams collaborate with state education agency leaders across these states to identify priority areas, address their most pressing needs, and develop and implement practical solutions that improve teaching and learning while using resources effectively. Leads the development of a learning cohort for Kansas Department of Education leaders to apply strategic school finance approaches to enhance the Kansas education workforce. Leads the enhancement and automation of Colorado Department of Education's (CDE) district finance early warning system in collaboration with CDE leaders.

Principal Investigator, Evaluation of the On-Ramp to Postsecondary Transitions (OPT) Project, funded by the U.S. Department of Education, Office of Elementary and Secondary Education, Education Innovation and Research (EIR) Program. Lead the independent evaluation OPT, a project carried out by Jobs for the Future and Colorado Succeeds exploring the impact of strategic concurrent enrollment courses, high-quality work-based learning, college and career navigation course modules, and a continuum of comprehensive services to improve college and career readiness (CRR) outcomes by building an on-ramp to early HS graduation and facilitating successful postsecondary transitions.

Co-Principal Investigator, Career and Life Outcomes for Gates Millennium Scholarship Recipients, Bill and Melinda Gates Foundation.

Led the study of the outcomes of Gates Millennium Scholars twenty years after their scholarship. Through assembling historical data and appending recent external data, the project examined two decades of outcomes related to education and career and life course.

Project Director, Research Partnership to Instrument OER Math Content R&D funded by the Bill & Melinda Gates Foundation. Led consortium in building an innovative data ecosystem that combines data from an existing Learning Management and Student Information System with metadata from curriculum providers to improving math outcomes of students from

Education

Ph.D., Education Policy

Teachers College,
Columbia University

M.A., Politics and Education

Teachers College,
Columbia University

M.S.Ed., Elementary Education

University of Pennsylvania Graduate
School of Education

B.A., Educational Studies and Journalism

Emory University

Expertise

Postsecondary Transitions

- Dual enrollment
- Nonacademic supports
- Family engagement
- Counseling and Awareness
- Workforce Development/Career Pathways

K-12 Education

- Math/STEM Instruction (preK-12)
- Teacher/Educator Workforce Development
- Rural Education
- Data Systems Design & Support
- School Improvement/Systems of Support
- School Funding/Resource Allocation
- Family Engagement Design
- Pathways and Career

Economic Evaluations/Cost Analysis

- Instrument Design, Data Collection, and Analysis
- Cost Tool Development

Methodology

- Mixed Methods

historically marginalized populations. Responsible for project quality and timeliness, team and subcontractor performance, and budget adherence. Led consortium of 7 partners including education service providers, curriculum providers, and school district partners.

Co-Principal Investigator, Cost Analysis in Practice (CAP) Project, funded by the U.S. Department of Education, Institute of Education Sciences, National Center for Education Evaluation. Provided free guidance and technical assistance to researchers and practitioners interested in or carrying out a cost-analysis. Created tools and resources to support researchers and practitioners with cost-analysis.

Representative Research Roles at SRI

Evaluation Lead, the National Technical Assistance Center for Preschool Development Grants Birth Through Five (PDG B-5 TA), funded by U.S. Department of Health & Human Services, Administration for Children & Families. Designed and executed evaluations of technical assistance provided to grantees. Led analysis and reporting to technical assistance providers, research team, and Administration for Children & Families. Refined evaluation approaches and systems to ensure efficient and effective data collection, analysis, and reporting.

Education Researcher, Evaluation of the Los Angeles City College STEM Pathways Program. Managed project, staff, and communication with partner; conducted interviews with program staff; wrote reports and deliverables; analyzed qualitative and quantitative data including surveys for evaluation of program aimed to support students attain degrees in the fields of science, technology, engineering, or mathematics (STEM).

Education Researcher, Regional Education Lab Appalachia (REL AP). Facilitated workshops on postsecondary transitions with educators, administrators and stakeholders across the state of Virginia and at various levels; provided technical assistance on cost analysis approaches utilizing the ingredients method to the Virginia Department of Education including designing a cost-feasibility methodology along with research tools such as interview protocols and a tailored cost tool for fiscal and resource data collection; prepared final cost tool kit for cost feasibility methodology tailored to the needs of Virginia leaders and practitioners; provided research support to educators and stakeholders.

Education Researcher, Efficacy Study of Foundations, School-wide Positive Discipline for Middle Schools. Led cost analysis component of the evaluation of the behavior intervention program using the ingredients method to assess the cost of implementation including an itemized list of resources and costs; designed program specific cost tool to identify program resources.

Education Researcher, Rural Math Excel Partnership Project, funded by an Investing in Innovation (i3) development grant from the U.S. Department of Education. Managed project and communication with client; conducted interviews with program staff; analyzed qualitative and quantitative data including surveys; wrote and presented final evaluation report.

Research Analyst, National High School Strategies study, funded by the U.S. Department of Education, Program and Program Studies Service. Analyzed survey data; wrote 2 of 13 final briefs for the U.S. Department of Education.

Professional History

NORC at the University of Chicago 2021 – Present

Principal Research Scientist
2024 - present
Senior Research Scientist
2021 - 2024

SRI International, Arlington, VA

Education Researcher
2016 - 2021
Student Research Associate
2015 - 2016

Consortium for Policy Research in Education (CPRE) at Teachers College, Columbia University, New York, NY

Senior Research Assistant
2012 – 2015

The Campaign for Education, New York, NY

Research Associate
2011 - 2012

Gwinnett County Public Schools, Kanoheh Elementary, Lawrenceville, GA

Fifth Grade Teacher
2007 - 2010

LEAP Academy University Charter School, Camden, NJ

Fifth Grade Teacher
2006-2007

Selected Publications and Presentations

- Seftor, N., Pratt-Williams, J., Rosenbloom, R., Telfort, R., Grigorian, K., Stewart, D. (*In Press*) Educational and Life Course Outcomes of the Gates millennium Scholars Program
- Pratt-Williams, J., Hamilton, J., Auletto, A., Zummak-Fredrick, C., Goren, P., & Sludden, J. (2025) *Partnerships, Data Sharing & Data Integration to Advance Middle School Math*. Presented for online webinar. <https://www.norc.org/events/partnering-for-the-future-innovative-middle-school-math-solutions.html>.
- Hollands, F.M., Pratt-Williams, J., & Shand, R. (2021). Cost analysis standards & guidelines 1.1. Cost Analysis in Practice (CAP) Project. <https://capproject.org/resources>.
- Virginia Department of Education (2020). Virginia Department of Education's cost-feasibility analysis toolkit for online learning programs.
- Mislevy, J., Piver-Renna, J., & Pratt-Williams, J. (2019). *Codesigning an evaluation of Virtual Virginia outcomes, implementation, and costs*. Presented at NCES STATS-DC Conference, Washington, DC, United States.
- Pratt-Williams, J., & Mislevy, J. (2019) *Using cost analysis to guide resource decisions*. U.S. Department of Education, Institute of Education Sciences, National Center for Education Evaluation and Regional Assistance, Regional Educational Laboratory Appalachia. https://ies.ed.gov/ncee/edlabs/regions/appalachia/blogs/blog17_cost-analysis-guide-resource-decisions.asp.
- Pratt-Williams, J., & Klima, T. (2019). *Beyond the basics: Conducting a cost analysis of a multi-site program implementation*. [Paper presentation submitted] The Society for Research on Educational Effectiveness (SREE) in Arlington, VA, United States.
- McGhee, R., Nagle, K., Pratt-Williams, J., Swantek, C., Lyulchenko, M., & Schmidt, R. (2016). *Evaluation of the Rural Math Excel Partnership Project: Final report for i3 grant*. SRI International.
- Nagle, K., Pratt-Williams, J., Schmidt, R., Swantek, C., Lyulchenko, M., & McGhee, R. (2016). *Evaluation of the Rural Mathematics Excel Partnership project year 3 report January 1–December 31, 2015*. SRI International.
- Pratt-Williams, J. (2015). *District consolidation: Is now the right time for New Jersey to regionalize?* [Paper presentation]. Association for Education Finance and Policy 40th Annual Conference, Washington, DC, United States.
- U.S. Department of Education. (2016). *Issue brief: Student support teams*. Office of Planning, Evaluation and Policy Development, Policy and Program Studies Service.
- U.S. Department of Education. (2016). *Issue brief: Middle to high school transition*. Office of Planning, Evaluation and Policy Development, Policy and Program Studies Service.
- Pratt-Williams, J., & Cocoran, T. (2015). *Changing classroom practice: The evaluation of the School Network Learning Project in Jordan*. Consortium for Policy Research in Education.
- Silander, M., & Pratt-Williams, J. (2013). *Jordan School Learning Project: Interim report*. Consortium for Policy Research in Education.

Roseline Telfort

Sr. Research Scientist

Dr. Telfort provides technical assistance and capacity building in L-12 educational settings, applying evidence-based strategies to strengthen student outcomes and institutional effectiveness. She uses quantitative and qualitative methods to study postsecondary retention, persistence, and completion of students in higher education. With over 17 years of higher education and research experience, Dr. Telfort evaluates postsecondary educational performance of students in STEM degree programs and has specific expertise in the application of artificial intelligence/machine learning to higher education topics.

Professional Experience

Central Comprehensive Center

Project Co-lead, October 2025-present

The Central Comprehensive Center serves state education agencies in Colorado, Kansas, Missouri, Nebraska, North Dakota, South Dakota, and Wyoming. The Central Comprehensive Center teams collaborate with state education agency leaders across these states to identify priority areas, address their most pressing needs, and develop and implement practical solutions that improve teaching and learning while using resources effectively. Co-leads capacity building and technical assistance efforts for the Colorado and South Dakota, and Wyoming Departments of Education on topics including chronic absenteeism and mathematics instructional framework development.

Youth Stand Up

Statistical Analysis Lead, August 2025- present

Youth Stand Up (YSU) is a civic education program for middle and high schoolers, developed by GBH, that uses media-rich, critically relevant content to build civic identity, efficacy, and engagement. It features a six-step curriculum, youth civic leader videos, and a media pitch showcase. In partnership with WGBH, NORC is launching a randomized control trial of the YSU curriculum with teachers and students across the nation.

PowerSchool Applicant Tracking System Evaluation

Statistical Analysis Lead, July 2025- present

NORC has been contracted by PowerSchool to evaluate their Unified Talent Applicant Tracking Solution. NORC will conduct an impact evaluation of the tracking solution's adoption, implementation, and utilization at various size school districts. Dr. Telfort leads the statistical analysis of the study.

Blueprint for Maryland's Future Interim Evaluation

College and Career Readiness Task Lead, April 2025-present

The Blueprint for Maryland's Future is an education reform initiative in Maryland to transform the state's public education system to ensure that all student's receive a high-quality education. NORC will conduct a systems change implementation evaluation to provide insight on how the Blueprint is

Education

PhD, Educational Research Methodology, 2023

Louisiana State University

MS, Higher Education Administration, 2009

Florida International University

BA, Sociology, 2006

University of Miami

Expertise

K12 Education

- Math/STEM Instruction (preK-12)
- Teacher/Educator Workforce Development
- AI/Education Technology
- Data Systems Design & Support
- Workforce Development/Career Pathways
- Chronic Absenteeism
- School Choice
- Family Engagement
- Summer Learning

Mixed Methods Methodologist

- Quantitative/Qualitative Analysis
- Survey Analysis

Data Analytics

- Machine Learning
- Artificial Intelligence
- Predictive Analytics

working as it is being implemented. Dr. Telfort will lead the College and Career Readiness (CCR) task of the evaluation and AI task.

Evaluation of ECMC Foundation's Rural Impact Initiative

Document Review Task lead, August 2024 – present

NORC at the University of Chicago (NORC) has been contracted to evaluate the impact of the ECMC Foundation's newly launched Rural Impact Initiative. NORC will provide thought partnership in the design and implementation of this five-year mixed methods evaluation as well as conduct the data collection and analysis necessary to identify evidence of impact. Dr. Telfort will lead the document review analysis for the evaluation.

Washington Statewide Family Engagement Center

Project Director January 2025-September 2025

Quantitative Survey Analysis lead, March 2024 – September 2025

The Washington Statewide Family Engagement Center (WAFEC) is led by Education Northwest and funded by the U.S. Department of Education. WAFEC pursues a comprehensive, collaborative, multi-system approach to establish a statewide collaborative infrastructure for family engagement; build educator and family capacity for effective family-school community partnerships; and develop district and school capacity to identify, implement, and sustain evidence-based family engagement practices. District and school capacity-building efforts will include online resources; opportunities to convene educators, families, and community partners; and intensive training and technical assistance. Dr. Telfort leads the quantitative analysis based on district, educator, and family surveys.

Louisiana State University

Mixed Methodology Researcher, March 2022 – August 2023

Dr. Telfort developed literature reviews and designed surveys in Qualtrics, managing deployment, data cleaning, and reporting for research projects. She analyzed quantitative and qualitative data using multiple systems and tools to generate actionable insights. Her work included exploratory statistical analysis, conducting interviews and focus groups, and coding qualitative data. She also produced visualizations and executive reports to effectively communicate findings and recommendations to stakeholders.

Data Analyst, August 2019 – August 2021

Dr. Telfort designed, administered, and analyzed over 1,200 student surveys using Qualtrics, delivering data-driven insights that informed program improvements. In addition, Dr. Telfort contributed to student development by helping design activities for a cohort of 20 peer mentors, fostering a supportive and engaging learning environment. Roseline conducted ad-hoc statistical analyses and generated reports that provided actionable insights for strategic decision-making. Her work also supported the assessment of programming and initiatives led by the College of Science helping align efforts with institutional goals and enhance overall program effectiveness.

Institutional Research Assistant, August 2018 – March 2020

Dr. Telfort supported institutional data reporting and analysis by updating and verifying peer institution comparison tables and surveys, ensuring consistency and accuracy across datasets. Roseline maintained reliable trend tables on the Budget & Planning website, providing stakeholders with dependable information for strategic decision-making. Her responsibilities included reviewing and editing data files for submission to Academic Analytics, upholding data integrity and compliance with reporting standards. Dr. Telfort also contributed to the Fall Facts Brochure by collecting and entering essential data and assisted in preparing files for the Board of Regents Financial Aid Data System, ensuring alignment with regulatory requirements.

Finance and Operations Assistant, August 2018 – August 2019

Dr. Telfort supported awards processing by developing competitions in InfoReady, vetting candidates, assigning reviewers, and managing award notifications, which streamlined the overall award workflow. She responded to graduate assistantship and award inquiries via email and phone, delivering timely and accurate information to stakeholders. Her responsibilities also included reconciling ledgers and awards monthly to ensure financial accuracy and accountability. Dr. Telfort regularly maintained and updated spreadsheets to improve data organization and accessibility, and prepared specialized projections, reports, and spreadsheets as requested to support informed decision-making.

Miami Dade College*Bachelor's Degree Program Coordinator, August 2013 – August 2018*

Dr. Telfort managed case coordination and course scheduling for over 450 bachelor's students, supporting academic progress and completion. She provided advising on admissions, financial aid, and degree requirements, improving student satisfaction and outcomes. Her outreach and marketing efforts increased program visibility and enrollment, while her career counseling helped students align academic and professional goals. She maintained enrollment data for reporting, developed marketing and retention initiatives, and created surveys to assess program effectiveness. Additionally, she represented the department at recruitment events and evaluated transfer transcripts to ensure accurate credit placement.

Miami Dade County Public Schools*Mathematics Interventionist, Feb 2012-Sep 2012*

Dr. Telfort delivered targeted small group instruction to help students meet state mathematics achievement standards, using data-driven strategies to support learning outcomes. She issued and collected Progress Monitoring and Ongoing Progress Monitoring data, using these insights to recommend instructional adjustments based on evolving student needs. Additionally, she performed various duties related to intervention delivery and assessment, contributing to the overall effectiveness of student support services.

Middle School Math Teacher, Sept. 2009-June 2011

Dr. Telfort taught mathematics to 6th, 7th, and 8th grade students across both regular and honors levels. Her lessons integrated reading, critical thinking, higher-order thinking, and problem-solving skills to deepen student understanding and engagement. She employed a variety of teaching methods, including hands-on manipulatives, lectures, demonstrations, and technology-enhanced instruction. To support students requiring additional help, she provided after-school tutoring and actively contributed to their overall development by coaching extracurricular activities such as the step team and cheerleading squad.

Florida International University*Degree-Audit Evaluator, Department of Enrollment Management, July 2008-July 2009*

Dr. Telfort evaluated and compared the potential implementation of an undergraduate degree audit system, GradExpress, against the existing SASS program. This involved measuring discrepancies and inaccuracies in both systems, specifically for the College of Education and the College of Arts & Sciences. To ensure transparency and collaborative problem-solving, I met with Academic Advising Directors from both colleges to present findings, highlight system errors, and discuss implications for student advising and program management.

Academic Advisor, Office of Undergraduate Studies, Sept. 2006-August 2008

Dr. Telfort provided academic advising to undergraduate students in both individual and group settings, supporting freshmen, transfer, lower-division, online/virtual, college prep/remedial, and students on academic warning or probation. Her guidance covered academic programs, career planning, and degree completion requirements, contributing to improved student outcomes and retention. She assisted students in resolving academic challenges and closely monitored the progress of those on probation. During orientation sessions, she advised new freshmen and transfer students and helped them select courses for Fall, Spring, and Summer semesters. Dr. Telfort also offered referrals to university offices and resources as needed to support student success. Beyond advising, she participated in pre-collegiate outreach programs and admissions open houses and conducted academic success presentations and workshops for First Year Experience courses.

Miami Dade County Public Schools*Mathematics Interventionist, Feb 2012-Sep 2012*

Dr. Telfort delivered targeted small group instruction to help students meet state mathematics achievement standards, using data-driven strategies to support learning outcomes. She issued and collected Progress Monitoring and Ongoing Progress Monitoring data, using these insights to recommend instructional adjustments based on evolving student needs. Additionally, she performed various duties related to intervention delivery and assessment, contributing to the overall effectiveness of student support services.

Middle School Math Teacher, Sept. 2009-June 2011

Dr. Telfort taught mathematics to 6th, 7th, and 8th grade students across both regular and honors levels. Her lessons integrated reading, critical thinking, higher-order thinking, and problem-solving skills to deepen student understanding and engagement. She employed a variety of teaching methods, including hands-on manipulatives, lectures, demonstrations, and technology-enhanced instruction. To support students requiring additional help, she provided after-school tutoring and actively contributed to their overall development by coaching extracurricular activities such as the step team and cheerleading squad.

Florida International University***Degree-Audit Evaluator, Department of Enrollment Management, July 2008-July 2009***

Dr. Telfort evaluated and compared the potential implementation of an undergraduate degree audit system, GradExpress, against the existing SASS program. This involved measuring discrepancies and inaccuracies in both systems, specifically for the College of Education and the College of Arts & Sciences. To ensure transparency and collaborative problem-solving, I met with Academic Advising Directors from both colleges to present findings, highlight system errors, and discuss implications for student advising and program management.

Academic Advisor, Office of Undergraduate Studies, Sept. 2006-August 2008

Dr. Telfort provided academic advising to undergraduate students in both individual and group settings, supporting freshmen, transfer, lower-division, online/virtual, college prep/remedial, and students on academic warning or probation. Her guidance covered academic programs, career planning, and degree completion requirements, contributing to improved student outcomes and retention. She assisted students in resolving academic challenges and closely monitored the progress of those on probation. During orientation sessions, she advised new freshmen and transfer students and helped them select courses for Fall, Spring, and Summer semesters. Dr. Telfort also offered referrals to university offices and resources as needed to support student success. Beyond advising, she participated in pre-collegiate outreach programs and admissions open houses and conducted academic success presentations and workshops for First Year Experience courses.

Selected Publications

Telfort, R. (2024). Research Brief: Artificial Intelligence in STEM Higher Education: Opportunities, Challenges & Ethical Dilemmas. Chicago, IL: NORC.

Telfort, R. (2023). A Supervised-Machine Learning Approach to Predict Graduation of First-Time in College STEM Majors at a Southeastern Public University. [Doctoral Dissertation, Louisiana State University]. LSU Baton Rouge Campus Repository. https://repository.lsu.edu/gradschool_dissertations/6239

Selected Presentations

Telfort, R & Zeng, L. (2023, April 12-15). The Use of Predictive Analytics in Test-Optional Admissions of STEM Majors. [Conference poster presentation]. 2023 National Council on Measurement in Education Annual Meeting, Chicago, IL.

Telfort, R. (2021, November 2-5). Engineering Majors: Predicting First-year Retention utilizing Supervised Machine Learning Models. [Conference poster presentation]. 2021 National Symposium on Student Retention Annual Conference, Virtual.

Telfort, R. (2019, February 22-23). Emerging Scholar Dialogues. [Conference panel discussant]. 2019 Curriculum Camp Conference, Baton Rouge, LA.

Amy C. Morton

717-253-2815

4605 Laurel Valley Lane, Enola, PA 17025

amorton4605@comcast.net

Professional Profile

Innovative, results-driven leader with 40+ years of experience working on behalf of students, families and educators at the school, district, regional, state and national levels. Excelling in designing and implementing effective and efficient regional, district and school systems that achieve equitable outcomes; and communicating, collaborating and leveraging resources for maximum returns.

Professional Experience

The Education Policy and leadership Center (EPLC)

July 2019-present

Executive Director (*January 2023-present*)

Fellowship Program Coordinator (*2019-2022*)

Achievements

- Initiated new financial strategies to improve efficiency, accountability, and revenues
- Coordinated the redesign of the EPLC website

Responsibilities

- Work with a 21-member Board of Directors and 3 part-time staff to promote effective public education policy in Pennsylvania
- Provide direction for EPLC's Education Policy Fellowship Program and Advanced Education Policy Leadership Program

Consultant, Enola PA

July 2025-present

National Center on Education and the Economy (NCEE)

As a consultant with NCEE I lead the PA Funders' Collaborative which is a group of 20+ foundation leaders working on a more systemic and strategic statewide effort to coordinate both funding efforts and policy initiatives.

National Center on Education and the Economy (NCEE), Washington, D.C. *July 2016-June 2025*

Senior Policy Design Specialist (*2023-2025*)

System Design Specialist (*2021-2023*)

Pennsylvania State Director (*2016-2021*)

Achievements

- Facilitated the creation of the PA Commission on Education and Economic Competitiveness and meetings of its single Subcommittee to produce a detailed vision of the future of PA education
- Led the creation of the multi-sector *PA Needs Teachers* campaign (paneedsteachers.com) in collaboration with Teach Plus PA, resulting in successful passage of legislation and funding that provides \$10,000 stipends for student teachers
- Partnered with Penn State University and the PA Principals Association, led the development of a state-endorsed advanced credential for experienced principals, earned through demonstrated competency and developing the capacity of one's peers

- Worked directly with 189 superintendents, charter school CEOs, and Intermediate Unit executive directors over five years to design, implement and evaluate system-wide redesign in curriculum, assessment, professional learning, and the artful use of infrastructure

Responsibilities

- Work directly with legislators; PA and MD Dept of Education leaders; higher education deans and program directors; and school district, CTC, and charter school educators to develop policies and practices that result in improved student outcomes
- Establish and maintained excellent relationships with private and community foundations, chambers of commerce, membership/advocacy organizations, and other entities to develop greater support for world-class education system design
- Oversee all aspects of NCEE's partnership with the PA Department of Education to raise the performance of school and district leaders in Pennsylvania
- Facilitate the NCEE Executive Development Program for Principals, Superintendent Academy, District System Design Partnership, and System Design Benchmarking programs for PA clients
- Lead the development of PA's Leadership Development System, including a career ladder for principals

Central Susquehanna Intermediate Unit (CSIU), Milton, PA
Chief Academic Officer

July 2013-June 2016

Achievements:

- Secured \$800,000 for districts to implement hybrid learning models
- Led districts' transitions to 21st century learning with multiple partners (*KnowledgeWorks, Eduplanet21, BrightBytes, Modern Teacher*)
- Increased CSIU regional presence through radio interviews and press briefings on key educational topics

Responsibilities:

- Lead and supervise 9 administrators overseeing 15 or more federal-, state- and local-funded programs representing about \$10 million in services to infants through adults in a five-county+ region
- Work with school districts, career and technical centers, other intermediate units, higher education institutions, non-profit organizations, state and national professional associations, contractors and vendors to achieve mutual goals

PA Department of Education, Harrisburg, PA
Executive Deputy Secretary (2011-2013)
Deputy Secretary for K-12 Education (2010)

July 2010-June 2013 (also 2005 and 1996)

Achievements:

- Developed \$40 million federal Race to the Top grant
- Implemented groundbreaking PA Act 141 financial recovery law
- Reorganized agency offices to manage reductions in staff and general operating budget
- Coordinated Pennsylvania's ESEA Flexibility proposal to USDE
- Initiated state support of hybrid/blended instructional models

Responsibilities:

- Lead and supervise the five deputy offices of PDE

- Work closely with the Governor's Office, General Assembly and State Board of Education to inform and implement education laws, regulations and policies
- Work with school districts, intermediate units, higher education institutions, non-profit organizations, state and national professional associations, contractors, and leaders from other state education departments to achieve mutual goals
- Served as Acting Secretary of Education (January 2011), Bureau Director for Assessment & Accountability (2005) and Bureau Director for Curriculum & Academic Services (1996)

Capital Area Intermediate Unit, Summerdale, PA
Executive Director (2007-2010)

July 2002-July 2010

Achievements:

- Led the creation of Capital Area Online Learning Association which now serves thousands of students in 100+ school districts statewide
- Substantially improved facilities for students: Capital Area School for the Arts & Hill Top Academy
- Improved quality of professional and pre-professional educators through research-based instructional strategies initiative
- Re-branded the CAIU as part of a comprehensive communication plan

Responsibilities:

- Provide leadership for regional education services agency with a \$90 million+ annual budget serving 24 school districts plus charter schools, non-public schools, and early childhood programs
- Superintendent of Record for Cumberland-Perry and Dauphin County Technical Schools
- Served previously as Assistant Executive Director (2005-2007), Director of Education Services (2002-2005), and Curriculum Specialist (1993-1996)

Wilson College, Penn State York, York College, Wilkes University 1991-2005

Adjunct Instructor - taught courses in leadership, curriculum, assessment, instruction

Gettysburg Area School District, Gettysburg, PA

1997-2002

Director of Curriculum - led prof learning, curr & assmt, federal programs, home schooling & ESL

Capital Area Intermediate Unit, Summerdale, PA

1993-1996

Curriculum Specialist - led district leaders and teachers in professional learning & curriculum dev

Carlisle Area School District, Carlisle, PA

1983-1992

K-12 Department Coordinator (1988-1992) - supervised/evaluated 26 teachers grades 6-12

HS Social Studies Teacher (1983-1992) - taught 9th-12th grades, including AP courses in gov't & history

Education

McDaniel College, Westminster, MD
 Dickinson College, Carlisle, PA

MS in Education Administration, 1988

BA in Political Science and American Studies, 1983

Credentials

- PA Superintendent/Executive Director Letter of Eligibility
- PA Supervisor II Curriculum & Instruction
- PA Supervisor II Social Studies
- PA Instruction II Social Studies

Awards/Honors/Memberships

- Athletic Hall of Fame, Exeter Township School District, 2020
- Member, Board of Directors, The Professional Institute for Instructional Coaching, 2018-
- Member, Board of Managers, Glen Mills School, 2017- 2019
- Commissioner, Education Commission of the States (ECS), 2010-2013
- Honorary American FFA Member, 2011
- Secretary, PA Association of Intermediate Units, 2009-2010
- Distinguished Leader Award, PA Department of Education, Division of Federal Programs and PA Association of Federal Program Coordinators, 2009
- Academic Hall of Fame, Exeter Township School District, 2009
- President's Award, PA Association for Supervision and Curriculum Development, 1997

District of Columbia

Letter of Designation/Endorsement

- Office of the State Superintendent of Education



OFFICE OF THE STATE
SUPERINTENDENT OF EDUCATION

June 26, 2026

Christina Russell
Co-Owner and Principal
Policy Studies Associates
1120 20th Street NW, Suite 200N
Washington, DC 20036

Dear Ms. Russell,

The Office of the State Superintendent of Education (OSSE), the State Education Agency for the District of Columbia, acknowledges Policy Studies Associates, with partners SRI International and NORC at the University of Chicago, as a Region 3 (Mid-Atlantic) applicant for the FY 2026 Comprehensive Center grant competition with the US Department of Education. We affirm that Policy Studies Associates served District of Columbia students through its prior leadership of the Mid-Atlantic Comprehensive Center. From 2023-2024, Policy Studies Associates worked with OSSE to develop the current DC Graduate Profile and led research to support OSSE's recommendations for changes to the District's current graduation requirements.

If awarded, OSSE looks forward to continued collaboration with Policy Studies Associates to advance our priorities that support educators and students throughout the District of Columbia.

Sincerely,

Antoinette S. Mitchell, Ph.D.
State Superintendent of Education

Delaware

Letters of Designation/Endorsement

- Delaware Department of Education
- Christina School District



Department of Education

Townsend Building
401 Federal Street Suite 2
Dover, Delaware 19901-3639
education.delaware.gov

Cynthia Marten
Secretary of Education
302-735-4000
302-739-4654 (fax)

U.S. Department of Education
Office of Elementary and Secondary Education
Comprehensive Centers Program
400 Maryland Avenue, SW
Washington, DC 20202

RE: State Endorsement for FY 2026 Comprehensive Centers Program Application

Dear Selection Committee:

The Delaware Department of Education writes in support of Policy Studies' application to serve as a Comprehensive Center under the FY 2026 Comprehensive Centers Program.

Delaware's strategic plan is centered on ensuring every learner is prepared for success in college, career, and life. To advance that vision, we are focused on:

- Strengthening leadership and instructional capacity across schools and districts
- Supporting schools in implementing sustainable systems that improve student outcomes
- Building strong conditions for educator effectiveness, recruitment, and retention

Over the past several years, Policy Studies has been a valued partner in supporting these priorities. Through leadership development, coaching, professional learning, and technical assistance, the organization has worked alongside Delaware educators and leaders to strengthen school and district capacity.

Policy Studies has supported initiatives related to school leadership, educator recruitment and retention, principal supervision, and implementation of Delaware's educator evaluation system. Their work has focused on helping education leaders translate strategy into practice and build systems that support continuous improvement.

Comprehensive Centers play an important role in helping states address complex challenges through technical assistance, capacity building, and shared learning. Delaware would welcome the opportunity to continue learning from resources, tools, and supports that help strengthen educational outcomes for students and educators.

Delaware supports this application because we value technical assistance that is responsive to state-defined priorities, strengthens state and local capacity, and remains accountable to improved outcomes for students. If awarded, I would expect the Comprehensive Center to engage the Delaware Department of Education early and consistently to align any Delaware-facing work with our strategic plan, implementation needs, and measurable student outcomes.

Federal support connected to Delaware should strengthen Delaware's plan, not create a parallel agenda.

Sincerely,

A handwritten signature in black ink that reads "Cynthia Marten". The script is cursive and fluid, with the first name "Cynthia" and last name "Marten" clearly legible.

Cynthia Marten
Secretary of Education
Delaware Department of Education

DEIRDRA JOYNER, Ed.D.
Superintendent

Jun 18, 2026

The Honorable Linda E. McMahon
Secretary of Education
U.S. Department of Education
400 Maryland Avenue SW
Washington, DC 20202

RE: Letter of Support for Policy Studies Associates — Region 3 Comprehensive Center

Dear Honorable Linda E. McMahon,

I am pleased to offer my strongest endorsement of Policy Studies Associates (PSA) as it seeks renewed federal funding to lead the Region 3 Comprehensive Center, providing critical support and services to five states, including Delaware. PSA has been an invaluable partner in advancing educational leadership, educator development, and systems improvement throughout our state.

One of the most impactful initiatives facilitated by PSA in Delaware has been the Principal Network, which has provided principals from some of our highest-need schools with targeted professional learning focused on instructional leadership and effective teaching practices. Through this work, school leaders have strengthened their capacity to drive meaningful improvement and support student success.

PSA has also played a vital role in developing Delaware's leadership pipeline by designing and implementing a comprehensive continuum of learning for aspiring school administrators and teacher leaders. These opportunities have equipped current and future leaders with the knowledge, skills, and practical experiences needed to lead effectively in today's educational environment.

In Christina specifically, PSA partnered with us to develop the Christina School District Leadership Academy, a "grow your own" professional learning experience designed to strengthen the leadership skills of current assistant principals aspiring to the principalship and other leadership roles. PSA worked closely with us to design the Academy around our specific context, bringing national, state, and local expertise alongside the voices of current and former Christina leaders to support our next generation of school leaders.

In addition, PSA has been a trusted partner in our educator recruitment and retention efforts. Their expertise has helped strengthen our systems for attracting, hiring, developing, and retaining high-quality educators. The evidence-based leadership development practices they employ have contributed to sustainable improvements that continue to benefit schools across the state.

The quality of support provided by PSA is exceptional. Their team engages experienced practitioners and experts who bring deep knowledge and practical insight to every initiative. This has been particularly evident in

CHRISTINAK12.ORG

their work with principal supervisors, an often-overlooked group whose development is essential to building strong school leadership systems.

As a result of our partnership, Delaware has adopted and embedded many of the strategies and frameworks developed through PSA's support. Their work has strengthened our capacity to support educators, leaders, and students, while creating lasting improvements across our educational system.

For these reasons, I wholeheartedly support PSA's grant application and strongly encourage the continued investment of federal funding to sustain and expand this important work. PSA's expertise, commitment, and impact have been instrumental to Delaware's progress, and continued support will ensure that educators and students across our state continue to benefit from their invaluable partnership.

Thank you for your consideration of this endorsement.

Sincerely,

A handwritten signature in black ink, appearing to read "Deirdra Joyner", with a stylized flourish at the end.

Deirdra Joyner, Ed.D.
Superintendent
Christina School District

Maryland

Letters of Designation/Endorsement

- Governor's Office for Children
- Eastern Shore of Maryland Educational Consortium
- Talbot County Public Schools
- Calvert County Public Schools

Governor's Office for Children Letter of Support



THE OFFICE OF GOVERNOR
WES MOORE

GOVERNOR'S OFFICE FOR CHILDREN

June 30, 2026

The Honorable Linda E. McMahon
United States Secretary of Education
400 Maryland Avenue SW
Washington, DC 20202

Dear Secretary McMahon:

The Governor's Office for Children (GOC) is pleased to provide this letter of support for the grant application submitted by Policy Studies Associates (PSA), with partners SRI International and NORC at the University of Chicago, to establish the Region 3 (Mid-Atlantic) Comprehensive Center under the FY 2026 Comprehensive Centers Program. Maryland would benefit from a strong, capable Region 3 Center, and PSA's proposal merits serious consideration as the Department selects an applicant to lead this work.

Improving educational opportunities and outcomes for students is a central priority for Maryland. Through the Blueprint for Maryland's Future, the State is undertaking a generational reform effort that changes how Maryland invests in early learning, prepares and supports educators, advances college and career readiness, and directs resources to schools and students with the greatest need. Delivering on the Blueprint requires sustained capacity at the State, regional, and local levels to select, implement, and sustain evidence-based programs, practices, and interventions, especially those focused on core instruction in mathematics and literacy. A well-led Region 3 Comprehensive Center can be an important resource in helping Maryland advance this work.

PSA and its partners bring relevant experience to this opportunity. They are recognized for providing client-driven technical assistance to state and local education agencies, with expertise in strategic planning, capacity building, evidence-based implementation support, and the research and policy analysis that inform effective State-level decision-making. When PSA led the Mid-Atlantic Comprehensive Center from 2019 to 2024, the Maryland State Department of Education received support that helped school and district leaders build the knowledge, skills, and systems needed to advance local implementation of the Blueprint. That track record gives me confidence that PSA is well positioned to serve the region effectively if selected.

Should the Department award a cooperative agreement to PSA, our agency partners at the Maryland State Department of Education would welcome the opportunity to work with the Region 3 Comprehensive Center as a client partner. We would anticipate participating in the development of a multi-year State Learning Agenda in coordination with the Center and the Regional Educational Laboratory serving our region, engaging in client-driven annual service planning, and working with the Center to extend capacity-building services to Maryland districts and schools with the greatest need, consistent with the priority population described in section 203(e) of the ETAA.

The Governor's Office for Children appreciates the Department's continued investment in the Comprehensive Centers Program and the support it provides to States as we work to improve outcomes for all students. Thank you for your consideration of PSA's application.

Governor's Office for Children Letter of Support



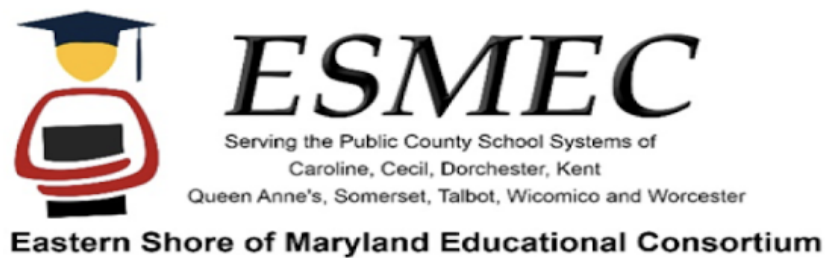
THE OFFICE OF GOVERNOR
WES MOORE

GOVERNOR'S OFFICE FOR CHILDREN

Sincerely,

A handwritten signature in blue ink, appearing to read "Carmel".

Carmel Martin
Special Secretary
Maryland Governor's Office for Children



June 23, 2026

The Honorable Linda E. McMahon
Secretary of Education
U.S. Department of Education
400 Maryland Avenue SW
Washington, DC 20202

RE: Letter of Support for Policy Studies Associates — Region 3 Comprehensive Center

Dear Honorable Linda E. McMahon,

I am pleased to offer my strongest endorsement of Policy Studies Associates (PSA) as it seeks renewed federal funding to lead the Region 3 Comprehensive Center, providing critical support and services to five states, including Maryland. PSA has been an invaluable partner in advancing educational leadership, educator development, and systems improvement throughout our state. One of the most impactful initiatives facilitated by PSA with the Eastern Shore of Maryland Educational Consortium (ESMEC) which is a consortium of 9 school districts on the Eastern shore of Maryland, has been the New Principal Leadership Network (year 1) and the Assistant Principal Leadership Network (year 2) which has provided targeted professional learning focused on instructional leadership and effective teaching practices.

These opportunities have equipped current and future leaders with the knowledge, skills, and practical experiences needed to lead effectively in today's educational environment. Through this work, school leaders have strengthened their capacity to drive meaningful improvement and support student success. PSA worked closely with us to design the Leadership Network around our specific context, bringing national, state, and local expertise alongside the voices of current and former Maryland leaders to support our next generation of school leaders. The Academy continues today.

In addition, PSA's evidence-based leadership development practices they employ have contributed to sustainable improvements that continue to benefit schools across the state. The

quality of support provided by PSA is exceptional. Their team engages experienced practitioners and experts who bring deep knowledge and practical insight to every initiative. They worked very hard to ensure that our capacity was built through their technical assistance so they could ensure sustainability of the programs with minimal to no assistance from them.

As a result of our partnership, ESMEC has adopted and embedded many of the strategies and frameworks developed through PSA's support. Their work has strengthened our capacity to support educators, leaders, and students, while creating lasting improvements across our educational system. For these reasons, I wholeheartedly support PSA's grant application and strongly encourage the continued investment of federal funding to sustain and expand this important work. PSA's expertise, commitment, and impact have been instrumental to ESMEC's progress, and continued support will ensure that educators and students across our state continue to benefit from their invaluable partnership.

Thank you for your consideration of this endorsement.

Sincerely,

Kelly L. Griffith, Ed.D.

Kelly L. Griffith, Ed.D.
Executive Director, ESMEC



Talbot County Public Schools

Talbot County Education Center

12 Magnolia St.
Easton, MD 21601
Phone: 410.822.0330
Fax: 410.820.4260
talbotschools.org

June 24, 2006

The Honorable Linda E. McMahon
Secretary of Education
U.S. Department of Education
400 Maryland Avenue SW
Washington, DC 20202

RE: Letter of Support for Policy Studies Associates — Region 3 Comprehensive Center

Dear Honorable Linda E. McMahon,

I am pleased to offer my strongest endorsement of Policy Studies Associates (PSA) as it seeks renewed federal funding to lead the Region 3 Comprehensive Center, providing critical support and services to five states, including Delaware. PSA has been an invaluable partner in advancing educational leadership, educator development, and systems improvement throughout our state.

Research has shown that principals are the second factor, after teachers, to student success. One of the most impactful initiatives facilitated by PSA with Talbot County Public Schools in Maryland has been their facilitation with the Principal Pipeline Self-Study Guide for Districts. This work has transformed how we look at leadership development. Through PSA's technical assistance they have built the capacity of our district staff, principal supervisor, principals, and assistant principals to evaluate our leadership systems, ensure the focus is on the leader standards, establish school improvement plans, and hold administrators accountable by the principal supervisor to these goals. Their expertise has helped strengthen our systems for attracting, hiring, developing, and retaining high-quality educators. The evidence-based leadership development practices they employ have contributed to sustainable improvements that continue to benefit schools across the state.

In addition, PSA has built my capacity as a new superintendent from a neighboring state by providing technical assistance to the Public School Superintendents Association of Maryland to create an onboarding process for new superintendents.

The quality of support provided by PSA is exceptional. Their team engages experienced practitioners and experts who bring deep knowledge and practical insight to every initiative. This has been particularly evident in their work with principal supervisors, an often-overlooked group whose development is essential to building strong school leadership systems.

As a result of our partnership, Talbot County Public Schools has adopted and embedded many of the strategies and frameworks developed through PSA's support. Their work has strengthened our capacity to support educators, leaders, and students, while creating lasting improvements across our educational system.

Sharon M. Pepukayl, Ed.D.
Superintendent of Schools

Emily L. Jackson
President, Board of Education

Amy R. Dodson
Vice President, Board of Education

Deborah L. Bridges

Cynthia M. Jurrius

Ann C. O'Connor

Dyshekia W. M. Strawberry

Karla L. Wieland-Cherry



Talbot County Public Schools

Talbot County Education Center

12 Magnolia St.

Easton, MD 21601

Phone: 410.822.0330

Fax: 410.820.4260

talbotschools.org

For these reasons, I wholeheartedly support PSA's grant application and strongly encourage the continued investment of federal funding to sustain and expand this important work. PSA's expertise, commitment, and impact have been instrumental to Delaware's progress, and continued support will ensure that educators and students across our state continue to benefit from their invaluable partnership.

Thank you for your consideration of this endorsement.

Sincerely,

A handwritten signature in blue ink, which appears to read "Sharon M. Pepukayi", is written over the word "Sincerely,".

Sharon M. Pepukayi, Ed.D.

Superintendent of Schools

Talbot County Public Schools

Sharon M. Pepukayi, Ed.D.
Superintendent of Schools

Emily L. Jackson
President, Board of Education

Amy R. Dodson
Vice President, Board of Education

Deborah L. Bridges

Cynthia M. Jurrius

Ann C. O'Connor

Dyshekia W. M. Strawberry

Karla L. Wieland-Cherry



June 26, 2026

The Honorable Linda E. McMahon
Secretary of Education
U.S. Department of Education
400 Maryland Avenue SW
Washington, DC 20202

RE: Letter of Support for Policy Studies Associates — Region 3 Comprehensive Center

Dear Honorable Linda E. McMahon,

I am pleased to offer my strongest endorsement of Policy Studies Associates (PSA) as it seeks renewed federal funding to lead the Region 3 Comprehensive Center, providing critical support and services to five states, including Delaware. PSA has been an invaluable partner in advancing educational leadership, educator development, and systems improvement throughout our state.

One of the most impactful initiatives facilitated by PSA in Calvert County Public Schools has been the Aspiring Leaders Program and the Leadership Academy, which has provided aspiring principals from some of our highest-need schools with targeted professional learning focused on instructional leadership and effective teaching practices. Through this work, school leaders have not only strengthened their capacity to drive meaningful improvement and support student success in their current roles but have also gained the confidence to lead our schools as principals.

In addition, PSA partnered with the Public School Superintendents' Association of Maryland (PSSAM) to create an aspiring superintendents' program focused on developing future system leaders. As a participant, I had the opportunity to learn directly from highly effective superintendents across the state and gained critical insights into the application and interview process, as well as the essential skill sets needed for system engagement, leading organizational change, and effective Board of Education governance.

The quality of support provided by PSA is exceptional. Their team engages experienced practitioners and experts who bring deep knowledge and practical insight to every initiative. They also build district capacity through a thoughtful gradual release model, ensuring sustainability beyond the duration of the partnership. As a result, Calvert County Public Schools has adopted and embedded many of the strategies and frameworks developed through PSA's work. Their partnership has strengthened our ability to support educators, develop leaders, and improve outcomes for students, while creating lasting, systemwide impact.

For these reasons, I wholeheartedly support PSA's grant application and strongly encourage the continued investment of federal funding to sustain and expand this important work. PSA's expertise, commitment, and impact have been instrumental to the progress of Calvert County Public Schools, and continued support will ensure that educators and students across our state continue to benefit from their invaluable partnership.

Thank you for your consideration of this endorsement.

Sincerely,

Susan B. Johnson, Ph.D.
Chief Operations Officer

New Jersey

Letter of Designation/Endorsement

- New Jersey Department of Education



MIKIE SHERRILL
Governor

DR. DALE G. CALDWELL
Lt. Governor

State of New Jersey
DEPARTMENT OF EDUCATION
PO Box 500
TRENTON, NJ 08625-0500

DR. LILY LAUX
Commissioner

June 30, 2026

Dear Grant Review Committee,

The New Jersey Department of Education (NJDOE) is pleased to support the Policy Studies Associates' (PSA) grant application with partners SRI International and NORC at the University of Chicago, to establish the Region 3 (Mid-Atlantic) Comprehensive Center under the FY 2026 Comprehensive Centers Program. New Jersey would benefit from a strong, capable Region 3 Center, and PSA's proposal merits serious consideration as the Department selects an applicant to lead this work.

The State of New Jersey has set an ambitious agenda for the next phase of our work. NJDOE is focused on modernizing the school funding formula, improving literacy outcomes, expanding high-impact tutoring, expanding access to preschool, and strengthening the educator pipeline. Delivering on these priorities requires sustained capacity at the State, district, and school levels to select, implement, and sustain evidence-based programs, practices, and interventions — particularly those that strengthen core instruction in literacy and mathematics. A well-led Region 3 Comprehensive Center is positioned to support that work.

From 2019 to 2024, when PSA led the Mid-Atlantic Comprehensive Center, NJDOE experienced PSA as a trusted effective partner. The Center's systems approach strengthened coordination and decision-making across the agency. PSA helped create the Maximizing Federal Funds website and worked with 16 offices to streamline needs assessments through a coordinated CNA tool that reduced burden and improved data use and student supports. The Center also supported key priorities including teacher shortages, early education, and multilingual learning. Throughout, PSA integrated into NJDOE, understood leadership priorities, and acted as a true thought partner.

The New Jersey Department of Education supports this application and is ready to support its successful implementation. Thank you for your consideration.

Sincerely,

A handwritten signature in black ink, appearing to read "Lily Laux".

Dr. Lily Laux
Commissioner

LL/DP/hl

c: Chris Williams

Pennsylvania

Letters of Designation/Endorsement

- Pennsylvania Department of Education
- PA Intermediate Units (i.e., Regional Educational Agencies)
 - Individual Letters
 - Berks County Intermediate Unit
 - Central Susquehanna Intermediate Unit
 - Chester County Intermediate Unit
 - Colonial Intermediate Unit 20
 - Northwest Tri-County Intermediate Unit 5
 - Riverview Intermediate Unit 6
- PA EDGE
- PA Association of Intermediate Units
- PA Association of School Administrators



COMMONWEALTH OF PENNSYLVANIA
DEPARTMENT OF EDUCATION

June 24, 2026

U.S. Department of Education
U.S. Department of Labor

Re: Comprehensive Centers Program Grant: Regional Centers

Dear Comprehensive Centers Program Grant Review Committee:

The Pennsylvania Department of Education (PDE) is pleased to support the application submitted by Policy Studies Associates (PSA) to serve as a Regional Comprehensive Center under the FY 2026 competition serving Delaware, the District of Columbia, Maryland, New Jersey, and Pennsylvania.

PSA, former operator of the Mid-Atlantic Regional Comprehensive Center (MACC) from 2019 to 2024, conducts research, program evaluation, and policy analysis; provides technical assistance and capacity building support; designs and delivers professional development and training; and supports systems design and implementation. PSA's goal is to partner with PDE by providing technical assistance that promotes turning the Commonwealth's own priorities, especially accelerating achievement in math and literacy, into practical results in classrooms, with particular attention to high-need, rural, and high-poverty schools.

According to the PDE's understanding of the proposed program based on available information, including the project description provided by PSA, their approach aligns with PDE's priorities as a State Educational Agency (SEA) by ensuring that technical assistance is responsive to state-defined needs, while also leveraging the expertise and operational capacity of trusted partners.

PDE recognizes the vital role MACC plays in strengthening state capacity and advancing high-quality, equitable education across the region. PDE's longstanding collaboration with MACC has provided access to rigorous research, evidence-based resources, and expert technical assistance that directly support the implementation of our state's education priorities. Through this partnership, PDE has been better equipped to address complex policy challenges, accelerate school improvement efforts, and enhance outcomes for all learners across the Commonwealth.

Thank you for your consideration of the above proposed project and potential funding opportunity.

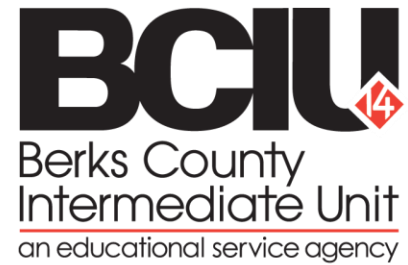
Sincerely,

A handwritten signature in cursive script that reads "C. Rowe".

Carrie Rowe, Ed.D.
Secretary of Education

June 22, 2026

The Honorable Linda E. McMahon
Secretary of Education
U.S. Department of Education
400 Maryland Avenue SW
Washington, D. C. 20202



Dear Secretary McMahon:

On behalf of the Berks County Intermediate Unit (BCIU), I am pleased to express our strong support for the proposal submitted by Policy Studies Associates (PSA), in partnership with SRI International and NORC at the University of Chicago, to lead the Mid-Atlantic Region (Region 3) Comprehensive Center through the FY 2026 Comprehensive Centers Program.

The Comprehensive Centers Program plays a vital role in supporting education agencies as they strengthen systems and respond effectively to evolving challenges. Through high-quality technical assistance, the program advances efforts to improve student outcomes, enhance the educator workforce, and increase organizational effectiveness.

The BCIU serves school districts, charter schools, career and technical centers, non-public schools, and other educational partners across Berks County and the surrounding region through a broad range of services, including professional development, leadership support, special education services, and operational programming. Our success is closely tied to strong partnerships and access to high-quality expertise that help guide meaningful and sustainable improvement.

PSA and its partners bring extensive experience collaborating with state and local education agencies to support planning, implementation, and continuous improvement. Their expertise aligns closely with the needs we see across Pennsylvania and the broader Mid-Atlantic region.

We have also seen the impact of PSA's prior leadership of the Mid-Atlantic Comprehensive Center, particularly in their ability to build trust, respond to local needs, and support both immediate problem-solving and long-term improvement efforts. This experience uniquely positions them to lead the next phase of this important work.

The BCIU would welcome the opportunity to engage with PSA and its partners should this proposal be selected. We are confident that their leadership would have a meaningful and lasting impact on educators and students throughout our region.

Thank you for your consideration.

Sincerely,

A handwritten signature in blue ink that reads "Jill M. Hackman". The signature is fluid and cursive, with a long horizontal stroke extending to the right.

Jill M. Hackman, Ed.D.
Executive Director

1111 Commons Boulevard
P.O. Box 16050
Reading PA 19612-6050
610-987-BCIU (2248)
FAX 610-987-8400 | TTY 610-987-8401
www.berksiu.org

June 17, 2026

The Honorable Linda E. McMahon
Secretary of Education
U.S. Department of Education
400 Maryland Avenue SW
Washington, DC 20202

Dear Secretary McMahon:

On behalf of the Central Susquehanna Intermediate Unit (CSIU), I am pleased to offer our support for the application submitted by Policy Studies Associates (PSA), in partnership with SRI International and NORC at the University of Chicago, to lead the Region 3 (Mid-Atlantic) Comprehensive Center under the FY 2026 Comprehensive Centers Program.

The Comprehensive Centers Program plays an important role in strengthening state and local educational systems by providing high-quality, evidence-based technical assistance that helps state and local education agencies address complex challenges, build organizational capacity, and improve outcomes for students. As education leaders continue to address issues related to educator workforce development, school improvement, student achievement, and operational effectiveness, access to responsive and effective technical assistance remains critically important.

As Executive Director of the CSIU, I believe Pennsylvania would benefit from PSA's leadership of the Mid-Atlantic Comprehensive Center. Our Intermediate Unit serves school districts, charter schools, career and technical centers and other educational partners across our region through professional learning, leadership development, special education services, instructional support and operational services. Success in these efforts depends on strong partnerships and access to expertise that helps educational organizations navigate change and implement sustainable improvements.

PSA, SRI International, and NORC bring extensive experience supporting state and local education agencies through strategic planning, capacity building, implementation support, research, evaluation and policy analysis. Their combined expertise aligns well with the priorities and challenges facing educational organizations throughout Pennsylvania and the Mid-Atlantic region.

Importantly, PSA's previous leadership of the Mid-Atlantic Comprehensive Center demonstrated its ability to establish trusted partnerships and provide meaningful support to educational stakeholders. Their work helped education leaders address immediate challenges while strengthening long-term capacity for improvement. Based on this record of success, I believe PSA is well positioned to lead the next generation of the Mid-Atlantic Comprehensive Center.

As an Intermediate Unit committed to supporting educational excellence and continuous improvement, we would welcome the opportunity to engage with PSA and its partners should this proposal be funded. We believe their leadership would strengthen the region's ability to support educators, improve systems and advance positive outcomes for students.

Thank you for your consideration of this application. I strongly support PSA's proposal and believe they are uniquely qualified to lead a Comprehensive Center that delivers meaningful value to Pennsylvania and the broader Mid-Atlantic region.

Sincerely,

A handwritten signature in blue ink, appearing to read "John Kurelja".

John Kurelja, Ed.D.
Executive Director



Chester County Intermediate Unit

June, 2026

The Honorable Linda E. McMahon
Secretary of Education
U.S. Department of Education
400 Maryland Avenue SW
Washington, DC 20202

Dear Secretary McMahon:

On behalf of the Chester County Intermediate Unit, I am pleased to offer our support for the application submitted by Policy Studies Associates (PSA), in partnership with SRI International and NORC at the University of Chicago, to lead the Region 3 (Mid-Atlantic) Comprehensive Center under the FY 2026 Comprehensive Centers Program.

The Comprehensive Centers Program plays an important role in strengthening state and local educational systems by providing high-quality, evidence-based technical assistance that helps state and local education agencies address complex challenges, build organizational capacity, and improve outcomes for students. As education leaders continue to address issues related to educator workforce development, school improvement, student achievement, and operational effectiveness, access to responsive and effective technical assistance remains critically important.

As Executive Director of the Chester County Intermediate Unit, I believe Pennsylvania would benefit from PSA's leadership of the Mid-Atlantic Comprehensive Center. Our Intermediate Unit serves school districts, charter schools, career and technical centers, and other educational partners across our region through professional learning, leadership development, special education services, instructional support, and operational services. Success in these efforts depends on strong partnerships and access to expertise that helps educational organizations navigate change and implement sustainable improvements.

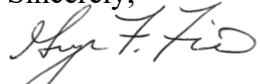
PSA, SRI International, and NORC bring extensive experience supporting state and local education agencies through strategic planning, capacity building, implementation support, research, evaluation, and policy analysis. Their combined expertise aligns well with the priorities and challenges facing educational organizations throughout Pennsylvania and the Mid-Atlantic region.

Importantly, PSA's previous leadership of the Mid-Atlantic Comprehensive Center demonstrated its ability to establish trusted partnerships and provide meaningful support to educational stakeholders. Their work helped education leaders address immediate challenges while strengthening long-term capacity for improvement. Based on this record of success, I believe PSA is well positioned to lead the next generation of the Mid-Atlantic Comprehensive Center.

As an Intermediate Unit committed to supporting educational excellence and continuous improvement, we would welcome the opportunity to engage with PSA and its partners should this proposal be funded. We believe their leadership would strengthen the region's ability to support educators, improve systems, and advance positive outcomes for students.

Thank you for your consideration of this application. I strongly support PSA's proposal and believe they are uniquely qualified to lead a Comprehensive Center that delivers meaningful value to Pennsylvania and the broader Mid-Atlantic region.

Sincerely,

A handwritten signature in black ink, appearing to read "George F. Fiore". The signature is fluid and cursive, with the first name "George" and last name "Fiore" clearly distinguishable.

George F. Fiore, Ed.D.

Executive Director

Chester County Intermediate Unit

June 16, 2026

The Honorable Linda E. McMahon
Secretary of Education
U.S. Department of Education
400 Maryland Avenue SW
Washington, DC 20202

Dear Secretary McMahon:

On behalf of Colonial Intermediate Unit 20 (CIU20), I am pleased to offer our enthusiastic support for the application submitted by Policy Studies Associates (PSA), in partnership with SRI International and NORC at the University of Chicago, to lead the Region 3 (Mid-Atlantic) Comprehensive Center under the FY 2026 Comprehensive Centers Program.

The mission of the Comprehensive Centers Program to build the capacity of state educational agencies, local educational agencies, and their partners to implement evidence-based practices that improve educational outcomes for all students closely aligns with the work and values of CIU20. As an educational service agency serving school districts, charter schools, career and technical education centers, nonpublic schools, and community partners throughout eastern Pennsylvania, we are committed to helping educational organizations strengthen systems, develop leadership capacity, and create sustainable conditions for student success.

At CIU20, our work is grounded in supporting continuous improvement, advancing educational success, strengthening special education services, and providing high-quality professional learning and operational support to the schools and communities we serve. The Mid-Atlantic Comprehensive Center's focus on translating research into practice, fostering organizational capacity, and supporting data-informed decision-making directly complements our mission of helping educational leaders navigate increasingly complex challenges while maintaining a relentless focus on student outcomes.

As schools continue to address educator recruitment and retention, academic recovery and acceleration, student well-being, inclusive practices, and organizational effectiveness, the need for trusted technical assistance partners has never been greater. The Comprehensive Center model provides an important bridge between research, policy, and practice, ensuring that educational leaders have access to the expertise and support necessary to implement meaningful and lasting improvements. These priorities mirror CIU20's strategic commitment to serving as a catalyst for innovation, collaboration, and continuous growth across our region.

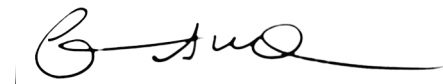
PSA, SRI International, and NORC bring a unique combination of expertise in strategic planning, implementation science, organizational improvement, research, evaluation, and policy analysis. Their collective experience positions them to help state and local education agencies not only address immediate challenges but also build the internal capacity necessary for long-term success. This emphasis on sustainable systems improvement is particularly important as educational organizations work to maximize resources, strengthen workforce development efforts, and improve outcomes for increasingly diverse student populations.

Importantly, PSA's previous leadership of the Mid-Atlantic Comprehensive Center demonstrated a deep understanding of the needs and priorities of educational organizations throughout the region. Through trusted partnerships and responsive support, PSA helped education leaders leverage evidence-based practices, strengthen organizational effectiveness, and address emerging challenges. Their work reflects a commitment to collaboration and continuous improvement that resonates strongly with CIU20's own approach to service and support.

As an Intermediate Unit dedicated to empowering educational leaders and strengthening learning communities, CIU20 would welcome opportunities to collaborate with PSA and its partners should this proposal be funded. We are confident that their leadership of the Mid-Atlantic Comprehensive Center would enhance the region's capacity to support educators, improve systems, and advance equitable and positive outcomes for all students.

Thank you for your consideration of this application. I strongly support PSA's proposal and believe their partnership offers the vision, expertise, and collaborative approach necessary to advance the mission of the Comprehensive Centers Program and create meaningful impact throughout Pennsylvania and the broader Mid-Atlantic region.

Sincerely,



Christopher S. Wolfel, Ed. D.
Executive Director
Colonial Intermediate Unit 20



Northwest Tri-County Intermediate Unit 5

252 Waterford St. Edinboro, PA 16412
Phone: 814-734-5610 / 1-800-677-5610
Fax: 814-734-2303
TDD: 711
www.iu5.org

The Honorable Linda E. McMahon
Secretary of Education
U.S. Department of Education
400 Maryland Avenue SW
Washington, DC 20202

Dear Secretary McMahon:

On behalf of Northwest Tri-County Intermediate Unit 5, I am pleased to offer our support for the application submitted by Policy Studies Associates (PSA), in partnership with SRI International and NORC at the University of Chicago, to lead the Region 3 (Mid-Atlantic) Comprehensive Center under the FY 2026 Comprehensive Centers Program.

The Comprehensive Centers Program plays an important role in strengthening state and local educational systems by providing high-quality, evidence-based technical assistance that helps state and local education agencies address complex challenges, build organizational capacity, and improve outcomes for students. As education leaders continue to address issues related to educator workforce development, school improvement, student achievement, and operational effectiveness, access to responsive and effective technical assistance remains critically important.

As Executive Director of Northwest Tri-County Intermediate Unit 5, I believe Pennsylvania would benefit from PSA's leadership of the Mid-Atlantic Comprehensive Center. Our Intermediate Unit serves school districts, charter schools, career and technical centers, and other educational partners across our region through professional learning, leadership development, special education services, instructional support, and operational services. Success in these efforts depends on strong partnerships and access to expertise that helps educational organizations navigate change and implement sustainable improvements.

PSA, SRI International, and NORC bring extensive experience supporting state and local education agencies through strategic planning, capacity building, implementation support, research, evaluation, and policy analysis. Their combined expertise aligns well with the priorities and challenges facing educational organizations throughout Pennsylvania and the Mid-Atlantic region.

Importantly, PSA's previous leadership of the Mid-Atlantic Comprehensive Center demonstrated its ability to establish trusted partnerships and provide meaningful support to educational stakeholders. Their work helped education leaders address immediate challenges while strengthening long-term capacity for improvement. Based on this record of success, I believe PSA is well positioned to lead the next generation of the Mid-Atlantic Comprehensive Center.

As an Intermediate Unit committed to supporting educational excellence and continuous improvement, we would welcome the opportunity to engage with PSA and its partners should this proposal be funded. We believe their leadership would strengthen the region's ability to support educators, improve systems, and advance positive outcomes for students.

Thank you for your consideration of this application. I strongly support PSA's proposal and believe they are uniquely qualified to lead a Comprehensive Center that delivers meaningful value to Pennsylvania and the broader Mid-Atlantic region.

Sincerely,

Brad Whitman
Executive Director
Northwest Tri-County Intermediate Unit 5



*Riverview Intermediate Unit 6
270 Mayfield Road
Clarion, PA 16214*



814-226-7103



814-226-4850



www.riu6.org

The Honorable Linda E. McMahon
Secretary of Education
U.S. Department of Education
400 Maryland Avenue SW
Washington, DC 20202

Dear Secretary McMahon:

On behalf of Riverview Intermediate Unit 6, I am pleased to offer our support for the application submitted by Policy Studies Associates (PSA), in partnership with SRI International and NORC at the University of Chicago, to lead the Region 3 (Mid-Atlantic) Comprehensive Center under the FY 2026 Comprehensive Centers Program.

The Comprehensive Centers Program plays an important role in strengthening state and local educational systems by providing high-quality, evidence-based technical assistance that helps state and local education agencies address complex challenges, build organizational capacity, and improve outcomes for students. As education leaders continue to address issues related to educator workforce development, school improvement, student achievement, and operational effectiveness, access to responsive and effective technical assistance remains critically important.

As Executive Director of Riverview Intermediate Unit 6, I believe Pennsylvania would benefit from PSA's leadership of the Mid-Atlantic Comprehensive Center. Our Intermediate Unit serves school districts, charter schools, career and technical centers, and other educational partners across our region through professional learning, leadership development, special education services, instructional support, and operational services. Success in these efforts depends on strong partnerships and access to expertise that helps educational organizations navigate change and implement sustainable improvements.

PSA, SRI International, and NORC bring extensive experience supporting state and local education agencies through strategic planning, capacity building, implementation support, research, evaluation, and policy analysis. Their combined expertise aligns well with the priorities and challenges facing educational organizations throughout Pennsylvania and the Mid-Atlantic region.

Importantly, PSA's previous leadership of the Mid-Atlantic Comprehensive Center demonstrated its ability to establish trusted partnerships and provide meaningful support to educational stakeholders. Their work helped education leaders address immediate challenges while strengthening long-term capacity for improvement. Based on this record of success, I believe PSA is well positioned to lead the next generation of the Mid-Atlantic Comprehensive Center.

As an Intermediate Unit committed to supporting educational excellence and continuous improvement, we would welcome the opportunity to engage with PSA and its partners should this proposal be funded. We believe their leadership would strengthen the region's ability to support educators, improve systems, and advance positive outcomes for students.

Thank you for your consideration of this application. I strongly support PSA's proposal and believe they are uniquely qualified to lead a Comprehensive Center that delivers meaningful value to Pennsylvania and the broader Mid-Atlantic region.

Sincerely,

A handwritten signature in blue ink, reading "Michael Stahlman". The signature is fluid and cursive, with the first name "Michael" and last name "Stahlman" clearly legible.

Dr. Michael Stahlman
Executive Director
Riverview Intermediate Unit 6



33 Springbrook Drive
Canton, PA 17724
Lori J. Stollar, Ed. D., Executive Director
Dennis M. Williams, Jr., President

June 15, 2026

The Honorable Linda E. McMahon
Secretary of Education
U.S. Department of Education
400 Maryland Avenue SW
Washington, DC 20202

Dear Secretary McMahon:

I am writing to endorse the grant application submitted to your Department by Policy Studies Associates (PSA), with partners SRI International and NORC at the University of Chicago, to establish the Region 3 (Mid-Atlantic) Comprehensive Center under the FY 2026 Comprehensive Centers Program. As Executive Director of the PA EDGE, the Pennsylvania Association for Elevating, Developing & Growing Educators (formerly Pennsylvania ASCD), our organization looks forward to working with PSA as the entity to lead the Region 3 Center on behalf of Pennsylvania. The fact that PSA intends to partner with PA's Education Policy and Leadership Center, a non-partisan, non-profit organization with which organizations across Pennsylvania, including ours, have an excellent, long-standing relationship, significantly strengthens the impact PSA can have in Pennsylvania.

PA EDGE recognizes that PSA and its partners are recognized leaders in providing intensive, client-driven technical assistance to state and local education agencies, with deep expertise in strategic planning, capacity building, evidence-based implementation support, and the research and policy analysis that inform effective State-level decision-making. PSA's support across a range of issues related to the educator workforce and school improvement has helped establish its reputation as a trusted and effective partner. Their leadership established the Center as a valued resource for Pennsylvania's districts and schools, and the Commonwealth would be well served to again have access to their expertise and that of their partners.

I strongly endorse this application and the value it represents for Pennsylvania and the Mid-Atlantic region.

Sincerely,

A handwritten signature in black ink that reads "Lori J. Stollar". The signature is written in a cursive, flowing style.

Dr. Lori Stollar
Executive Director
PA EDGE



The Honorable Linda E. McMahon
Secretary of Education
U.S. Department of Education
400 Maryland Avenue SW
Washington, DC 20202

Dear Secretary McMahon:

On behalf of the Pennsylvania Association of Intermediate Units (PAIU), I am pleased to offer our strong endorsement of the grant application submitted by Policy Studies Associates (PSA), in partnership with SRI International and NORC at the University of Chicago, to lead the Region 3 (Mid-Atlantic) Comprehensive Center under the FY 2026 Comprehensive Centers Program.

The Comprehensive Centers Program serves a critical role in strengthening state educational systems by providing high-quality, evidence-based technical assistance that helps states and local education agencies address complex challenges, build organizational capacity, and improve outcomes for students. At a time when education leaders are navigating significant demands related to educator workforce development, school improvement, student achievement, and operational effectiveness, the Comprehensive Centers represent an invaluable federal investment in continuous improvement and state-driven innovation.

As Executive Director of PAIU, I can offer that Pennsylvania would benefit from the expertise and collaborative approach that PSA and its partners would bring to the Region 3 Comprehensive Center. We look forward to working closely with PSA should this proposal be funded. Their decision to partner with Pennsylvania's Education Policy and Leadership Center (EPLC), a highly respected, nonpartisan organization with deep relationships across the Commonwealth, further strengthens their ability to provide meaningful, responsive support that reflects Pennsylvania's unique educational landscape.

Pennsylvania's 29 intermediate units, our state's education service agencies, serve as an essential component of the Commonwealth's educational infrastructure and a key partner to the Pennsylvania Department of Education. Intermediate units provide the statewide

system of support for school districts, charter schools, and career and technical centers through technical assistance, professional learning, leadership development, special education services, early intervention programs, business operations support, and other shared services that maximize educational outcomes while ensuring responsible stewardship of taxpayer resources. Because intermediate units operate primarily through service agreements rather than direct tax revenues, they have developed a strong culture of innovation and efficiency in meeting the evolving needs of schools and communities.

PAIU recognizes PSA, SRI International, and NORC as nationally respected organizations with extensive experience delivering intensive, client-centered technical assistance and supporting state and local education agencies in achieving sustainable improvements. Their expertise in strategic planning, capacity building, implementation science, research, and policy analysis aligns closely with the needs of Pennsylvania and the broader Mid-Atlantic region.

Importantly, PSA's leadership of the Mid-Atlantic Comprehensive Center from 2019 to 2024 demonstrated their ability to establish trusted partnerships and provide high-impact support to states and school districts. Many professionals have shared with me that the Center became a valued resource throughout Pennsylvania, helping education leaders address pressing challenges while advancing long-term improvement goals. Renewing access to PSA's leadership and the expertise of its partners would provide substantial value to Pennsylvania and the region.

The Pennsylvania Association of Intermediate Units strongly supports this application and firmly believes that PSA and its partners are exceptionally well positioned to lead a Comprehensive Center that advances educational excellence, strengthens state and local capacity, and delivers meaningful benefits to students and educators across the Mid-Atlantic.

Thank you for your consideration.

Yours in education,

Mark K. Leidy

Dr. Mark K. Leidy
Executive Director
Pennsylvania Association of Intermediate Units

June 17, 2026

The Honorable Linda E. McMahon
Secretary of Education
U.S. Department of Education
400 Maryland Avenue SW
Washington, DC 20202

Dear Secretary McMahon:

I am writing to endorse the grant application submitted to your Department by Policy Studies Associates (PSA), with partners SRI International and NORC at the University of Chicago, to establish the Region 3 (Mid-Atlantic) Comprehensive Center under the FY 2026 Comprehensive Centers Program. As Executive Director of the Pennsylvania Association of School Administrators (PASA), our organization looks forward to working with PSA as the entity to lead the Region 3 Center on behalf of Pennsylvania. The fact that PSA intends to partner with PA's Education Policy and Leadership Center, a non-partisan, non-profit organization with which organizations across Pennsylvania, including ours, have an excellent, long-standing relationship, significantly strengthens the impact PSA can have in Pennsylvania.

The Pennsylvania Association of School Administrators (PASA) is the membership organization of Pennsylvania's chief school administrators, central office administrations and other administrative professionals, with nearly 1,200 members, including school district superintendents, intermediate unit executive directors, and other central office administrators. Our members are critical to the effective implementation of state and federal policy in our school systems.

PASA recognizes that PSA and its partners are recognized leaders in providing intensive, client-driven technical assistance to state and local education agencies, with deep expertise in strategic planning, capacity building, evidence-based implementation support, and the research and policy analysis that inform effective State-level decision-making. PASA welcomes the opportunity to benefit from PSA's experience working across a range of issues related to the educator workforce and school improvement. Their leadership of MACC from 2019-2024 established the Center as a valued resource for Pennsylvania's districts and schools, and the Commonwealth would be well served to again have access to their expertise and that of their partners.

I strongly endorse this application and the value it represents for Pennsylvania and the Mid-Atlantic region.

Sincerely,



Dr. Sherri L. Smith, Executive Director

Letters of Commitment



June 9, 2026

Leslie Anderson, Co-Owner and Principal
Policy Studies Associates
1120 20th Street NW, Suite 200N
Washington, DC 20036

Dear Leslie,

On behalf of SRI International (SRI) and staff in SRI Education (a division of SRI), I am pleased to support Policy Studies Associates' bid for the Region 3 (Mid-Atlantic) Comprehensive Center (R3CC), which serves the states of Delaware, Maryland, New Jersey, Pennsylvania, and the District of Columbia. We understand that the R3CC will provide capacity-building services to state education agencies (SEAs) and their local recipients in relation to their identified needs and priorities.

As you know, SRI Education has a long and successful 25-plus year history working with Policy Studies Associates to provide high-quality technical assistance and evaluation services. We have worked together on more than a dozen projects addressing a wide range of education topics. We have also worked closely with clients and their stakeholders on defining project goals, research questions, and purposes and audiences for reports, training, and other dissemination efforts.

SRI Education will bring to the R3CC a deep bench of staff with expertise in a range of critical content areas, including literacy and the Science of Reading, mathematics curriculum and instruction, the role of artificial intelligence (AI) in education and digital learning, chronic absenteeism, school choice and parent engagement, high-impact tutoring, resource allocation, and work-based learning and workforce development.

Moreover, our team brings a wealth of experience in providing universal and targeted capacity-building at the state, district, and school levels. Our work has consistently focused on improving educational practices, facilitating change, and achieving desired outcomes. SRI is a well-qualified partner for this effort, with extensive experience in technical support through federally funded technical assistance centers, including the National Comprehensive Center (NCC), the Mid-Atlantic Comprehensive Center (2019–2024), the Regional Educational Laboratory (REL) Appalachia, the Preschool Development Grants Birth Through Five Technical Assistance Center, and the Center for IDEA Early Childhood Data Systems.

With our history of collaboration and the breadth of our expertise and experience, we believe SRI can make meaningful contributions to this work and welcome the opportunity to provide services for this important effort. It is our pleasure to work with the talented team at Policy Studies Associates to meet the needs of education policymakers and educators in the Mid-Atlantic region. We look forward to the possibility of working with you on this important project.

Sincerely,

A handwritten signature in black ink that reads "Katrina Woodworth".

Katrina Woodworth, Ed.D.
Director, Center for Education Research & Improvement, SRI Education

June 19, 2026

Leslie Anderson, Co-Owner and Principal
Policy Studies Associates, Inc.
1120 20th Street NW, Suite 200N
Washington, DC 20036

RE: ALN 84.283B — Comprehensive Centers Program, Region 3 Mid-Atlantic

Dear Ms. Anderson:

On behalf of NORC at the University of Chicago, I am pleased to confirm our commitment to supporting the work of Policy Studies Associates (PSA) as proposed for the U.S. Department of Education Comprehensive Center serving the Mid-Atlantic states: Delaware, the District of Columbia, Maryland, New Jersey, and Pennsylvania.

NORC is one of the largest independent social research organizations in the United States, with more than 80 years of pioneering research and data science. We are deeply committed to helping public agencies translate evidence into action. Through our Training and Technical Assistance practice, NORC provides comprehensive support across the entire TA lifecycle—from initial needs assessment to sustained implementation and evaluation—enabling state education agencies, districts, and education organizations to design, implement, and continuously improve policies and programs. NORC currently leads two of the U.S. Department of Education's Regional Comprehensive Centers: the Central Comprehensive Center, which builds state capacity across human, organizational, policy, and resource dimensions, and the Pacific West Comprehensive Center, which serves Guam, the Commonwealth of the Northern Mariana Islands, the Republic of Palau, and the Federated States of Micronesia through a contextualized, asset-focused approach. NORC has also led more than 20 national adult education initiatives for the Department's Office of Career, Technical, and Adult Education—including the LINCS Resource Collection and the Student Achievement in Reading (STAR) initiative—and has served as a long-term partner to the Office of Head Start and the Office of Child Care in strengthening the federal early childhood TA system.

NORC's distinctive strength for the proposed Region 3 Center is its ability to pair technical assistance expertise with the analytic infrastructure of a leading research organization. In coordination with PSA's lead, NORC would contribute to data infrastructure development, serve as a research partner on state priorities, and provide comparative analyses and benchmarking to inform SEA organizational and policy decisions. NORC's work on California's Cradle-to-Career Data System, including the NORC Data Enclave, serves as a relevant parallel for the data system priorities identified by several Mid-Atlantic states.

Our staff are prepared to lead or support Region 3 capacity-building projects in close coordination with PSA, should the Center be awarded. Thank you for the opportunity to participate in the proposed Comprehensive Center.

Sincerely,



Jennifer Hamilton,
Senior Vice President, Education and Child Development



THE EDUCATION POLICY AND LEADERSHIP CENTER
P.O. Box 25, Camp Hill, Pennsylvania 17001
717-253-2815

June 19, 2026

Leslie Anderson, Co-Owner and Principal
Policy Studies Associates, Inc.
1120 20th Street NW, Suite 200N
Washington, DC 20036

RE: ALN 84.283B – Comprehensive Centers Program, Region 3 Mid-Atlantic

Dear Ms. Anderson:

On behalf of the Education Policy and Leadership Center (EPLC), I am pleased to confirm our commitment to support the work of Policy Studies Associates (PSA) as proposed for the U.S. Department of Education Comprehensive Center serving the Mid-Atlantic states (Delaware, the District of Columbia, Maryland, New Jersey, and Pennsylvania).

Founded in 1998 and based in Pennsylvania, EPLC is a nonpartisan, statewide organization that works to improve education policy and practice. EPLC's work would contribute directly to the kind of capacity-building a Comprehensive Center is built to provide:

EPLC links relevant and reliable research and other information to state-level education policymakers and others and provides assistance with policy analysis and policy development. In the proposed Center, EPLC would help connect state education agencies and partners across the region to current evidence, comparative state policy analyses, and Pennsylvania-specific policy context – supporting PSA's work on priorities such as literacy and mathematics, educator workforce, school funding, and school improvement. EPLC would also contribute to stakeholder engagement, communications, and outreach strategies that build broader awareness of evidence-based practices and support state and local leaders in communicating clearly about education priorities – a contribution particularly valuable to universal-tier offerings reaching audiences across the five-jurisdiction region.

Our staff are prepared to lead or support Region 3 capacity-building projects in coordination with PSA should the Center be awarded.

We appreciate and are excited about the opportunity to participate in the proposed Comprehensive Center.

Sincerely,

Amy C. Morton
Executive Director
Education Policy and Leadership Center

Service Plans

Service Plan for the District of Columbia

Supporting OSSE's 2026–2030 Strategic Plan Implementation

Background

The District of Columbia Office of the State Superintendent of Education (OSSE), under the leadership of Superintendent Dr. Mitchell, has developed a 2026–2030 strategic plan organized around five priority areas — literacy and math, post-secondary success, high-quality special education, healthy and engaged learners, and excellent operations — and three cross-cutting initiatives: strategic funding, artificial intelligence, and data infrastructure. The plan emphasizes cross-agency coordination and the de-siloing of work across divisions, with the graduate profile serving as the guidepost connecting priorities to a coherent vision for DC learners.

Significant work is already in motion, including reimagining graduation requirements, introducing an integrated math sequencing pathway, an AI policy framework, and an ESSA grant redesign proposal. PSA has prior partnership history with OSSE on the graduate profile and graduation requirements work and is positioned to support OSSE in moving the strategic plan from publication to implementation.

Service Delivery Approach

Through the Region 3 (Mid-Atlantic) Comprehensive Center, PSA would serve the District of Columbia at three intensities of support. Each tier carries its own profile of quality, intensity, and duration, and the three together are designed to reinforce one another.

- **Intensive support** is multi-year, high-touch, embedded technical assistance to OSSE on its highest-leverage strategic plan priorities, co-designed with OSSE leadership and delivered through sustained partnership.
- **Targeted support** is mid-touch, cohort-based work with subsets of OSSE staff or DC LEAs on specific implementation challenges, delivered through structured cycles of professional learning and applied practice.
- **Universal support** is broad-reach, lower-touch resources, tools, and convenings available to all OSSE staff and DC LEAs, with two regional anchors (described below) addressing needs DC shares with the rest of the Mid-Atlantic.

Objectives

- Support OSSE in completing the graduation requirements implementation arc, particularly the training materials and rollout work that remains after State Board approval of OSSE's proposed changes.
- Help OSSE integrate the graduate profile at the staff, division, and program level, so it functions as a true internal guidepost rather than only a public-facing LEA artifact.
- Support OSSE's AI capacity building efforts — both for internal agency use and for LEA-facing guidance and support — aligned with the AI cross-cutting initiative.
- Support cross-agency strategic plan implementation, helping OSSE operationalize the de-siloed approach the plan is built around.

Scope of Activities by Service Tier

Intensive Support

Quality: senior PSA staff embedded with OSSE leadership, with sustained access to division leads and program staff; deliverables co-designed and OSSE-approved at every stage.

Intensity: high-touch, with weekly to biweekly working sessions during peak phases and continuous availability for technical assistance.

Duration: 18 to 24 months across two paired intensive engagements, with phased ramp-up in months 1–6.

Intensive engagement 1: Graduation requirements implementation and graduate profile integration (months 1–18)

- Develop training materials for LEAs on the new graduation requirements, aligned to the playbook, rubrics, and lesson plans already developed.
- Support rollout communications and stakeholder engagement following the August presentation of State Board recommendations.
- Facilitate working sessions with OSSE division and program leads to surface how each area connects to the graduate profile competencies.
- Develop division-level integration tools — for example, planning templates, decision frameworks, and program-design rubrics — that allow OSSE staff to apply the graduate profile to their own work.
- Design and deliver staff training so the graduate profile becomes the operative guidepost for internal decision-making, not only external-facing guidance.
- Coordinate transition support as the current strategic plan consultants roll off in August, ensuring continuity of the internal integration work.

Intensive engagement 2: Cross-agency strategic plan implementation (months 4–18)

- Support cross-divisional coordination structures so initiatives that span priority areas (for example, the funding components within literacy and math, post-secondary success, and special education) move forward in alignment rather than in parallel silos.
- Help OSSE design implementation routines — including cross-agency project reviews, shared metrics, and synchronized planning — that operationalize the de-siloed approach the plan is built around.
- Support integration of the three cross-cutting initiatives (strategic funding, AI, data infrastructure) into each priority area's implementation work.

Targeted Support

Quality: cohort-based programming with consistent facilitators, clear competency framework, and applied practice between sessions; participants selected by OSSE in consultation with PSA.

Intensity: medium-touch, with monthly sessions and structured between-session work.

Duration: 6 to 12 months per cohort, with the option to run successive cohorts over the Center's term.

AI policy implementation cohort for DC LEAs (months 6–18)

- Recruit a cohort of DC LEAs ready to stand up local AI policies and use cases.
- Provide structured professional learning aligned to the OSSE AI policy framework, with applied practice between sessions and peer learning across the cohort.
- Develop shared artifacts — model policies, vendor evaluation tools, classroom-use scenarios — that emerge from cohort work and benefit later cohorts.

Graduation requirements implementation cohort for LEAs (months 3–12)

- Run an LEA cohort focused on operationalizing the new graduation requirements at the school level, with attention to scheduling, advising, and capstone design.
- Connect cohort work to the graduate profile competencies so LEAs see the through-line from requirements to profile.
- Develop and refine implementation tools that scale to additional LEAs in subsequent cycles.

Universal Support

Quality: tools and resources peer-reviewed within the Center and field-tested; convenings led by content experts and OSSE staff together.

Intensity: low-touch, continuously available, with periodic content refresh.

Duration: ongoing across the full five-year Center term.

DC-wide universal services

- Training materials and rollout communications for the graduation requirements implementation, made available to all DC LEAs.
- Graduate profile integration toolkit and reference materials for OSSE staff and LEAs.
- LEA-facing AI policy implementation guidance and a curated repository of model policies and vendor evaluations.
- A consolidated implementation dashboard or progress tracker, if helpful, tied to the strategic plan's priority areas.

Universal services with a regional anchor

The Center delivers universal services available to every Mid-Atlantic jurisdiction, with two anchor offerings that address needs the District of Columbia shares with its regional peers. These are continuously available, lower-intensity offerings designed for broad reach and peer learning across state lines.

- **Mid-Atlantic Evidence-Based Literacy Network.** A region-wide peer learning network and resource hub focused on the science of reading, high-quality instructional materials, coaching models, and progress monitoring. Every state in the region has flagged literacy as a priority, with proficiency rates and post-COVID recovery as common concerns. The network offers quarterly cross-state convenings, a shared resource library, a regional

community of practice for state literacy leads, and an annual evidence brief on what is working across the region. Quality: grounded in the most current science-of-reading evidence and co-designed with state literacy leads. Intensity: low-touch, continuously available. Duration: ongoing across the full five-year Center term.

- **Mid-Atlantic AI in Education Working Group.** A cross-state working group for SEA staff developing AI governance frameworks, LEA-facing policy guidance, and use-case standards. Every state in the region is grappling with how to govern AI in schools, and no single state has fully figured it out — peer learning across states is particularly valuable here. The working group offers shared policy templates, monthly virtual sessions, an annual in-person convening, and a curated repository of state policies, vendor evaluations, and implementation lessons. Quality: led by AI policy experts working with each state's designated AI lead. Intensity: low-to-medium, with monthly cadence. Duration: ongoing across the full Center term.
- **Regional resource hub and convenings.** Tools, frameworks, briefs, and convenings available to all five jurisdictions, including an annual region-wide Mid-Atlantic education leaders convening, on-demand briefs on emerging policy issues, and access to Center-developed implementation tools. Quality: peer-reviewed and field-tested. Intensity: low-touch. Duration: ongoing.

Deliverables

- Training materials and rollout communications for the graduation requirements implementation (intensive into universal).
- Graduate profile integration toolkit for OSSE staff, with division-level templates and decision frameworks (intensive).
- Staff training sessions and reference materials for internal graduate profile integration (intensive).
- AI governance framework support documents and LEA-facing AI policy implementation guidance (intensive and targeted).
- Cross-agency coordination protocols and implementation routines (intensive).
- DC participation in the Mid-Atlantic Evidence-Based Literacy Network and the Mid-Atlantic AI in Education Working Group (universal).

Assumptions and Dependencies

- OSSE leadership will designate Chimere Jones (or another senior point of contact) as the primary liaison, with access to division leads and relevant program staff.
- State Board recommendations on graduation requirements are received as expected, allowing the August presentation and subsequent training work to proceed on schedule.
- The engagement is intended to complement existing partnerships and vendors (including the current research partner, the integrated math TAL vendor when selected, and the strategic plan consultants through August).
- Several adjacent opportunities — including the ESSA grant redesign and the practical studies diploma revamp — depend on superintendent approval and are addressed separately as additional potential projects below.

Estimated Timeline

Approximately 18 to 24 months from project initiation, with intensive engagement 1 and the first targeted cohort launching in months 1–6, intensive engagement 2 ramping in by month 4, and universal services available from month 1 onward and continuing across the full Center term.

Additional Identified Needs and Potential Projects

These are areas where OSSE has flagged need or where the conversation surfaced clear opportunities, but which depend on additional approvals, vendor decisions, or timing outside Chimere's immediate purview. They are candidates for expanded scope or follow-on engagements rather than the core service plan.

- **ESSA grant application redesign.** OSSE's Strategic Funding and School Supports team is developing a proposal to the superintendent that examines how other states administer ESEA grants. If the superintendent approves the redesign post-October 1, PSA could support the redesign process, including grant administration improvements, aligned grants management, simplified data and IT tools, and grant impact evaluation.
- **Practical studies diploma revamp.** This is the area the State Board has consistently flagged as needing additional work, and Chimere indicated significant post-September 30 work is required. PSA could support the policy development, stakeholder engagement, and design work needed to reconsider what the practical studies diploma looks like for students with disabilities.
- **Integrated math coursework development.** Depending on the scope of the TAL vendor that will help stand up the integrated math course sequence, there may be a role for PSA supporting standards review work (currently with the research partner), convening math specialists, or developing complementary implementation supports for LEAs.
- **Attendance and chronic absenteeism.** OSSE has a dedicated attendance coordinator and Mayor-level reporting includes attendance and immunization data. PSA's prior work on chronic absenteeism in other contexts is directly relevant, particularly in supporting the DC ecosystem partnership approach the strategic plan describes.
- **DCSAS survey strengthening.** The strategic plan calls for moving the DC School Climate and Wellness Survey from a one-time activity to a continuous quality improvement tool. PSA could support survey redesign, data analysis and reporting structures, and the development of school-level improvement protocols connected to the data.
- **Special education seamless transitions.** The plan emphasizes seamless transitions across all levels (0–5 to school-age, secondary to post-secondary, IFSP to IEP). This is a defined need with multiple sub-projects PSA could support, including IEP quality improvement, least restrictive environment support, and 0–5 training for diverse populations.
- **Data infrastructure capability building.** The cross-cutting data infrastructure initiative spans all divisions. PSA could support specific use cases — for example, post-secondary actionable data systems, CTE data integration, or attendance data monitoring — as discrete projects under this broader initiative.

- **Early childhood (birth through age 5).** Chimere noted the current focus is primarily on funding, but the priority appears across multiple strategic plan priority areas. As OSSE's project portfolio in this space develops, there may be opportunities to support implementation work.
- **Internal operations and SOP development.** The excellent operations priority area includes cross-agency knowledge management, standardization, and SOP development. This is foundational work that supports every other priority and is a natural fit for organizational support consulting.

Service Plan for Delaware

Supporting the Delaware Department of Education's Strategic Plan Implementation

Background

The Delaware Department of Education (DDOE) is implementing a strategic plan organized around five priority areas: Bright Beginnings (early education expansion); Safe Supportive Schools (student well-being, instructional leadership, and education workforce growth and retention); Great Teaching and Learning (early literacy, student achievement, data and assessment systems, and college and career readiness); Fair Opportunities for Every Learner (education funding reform and AI proficiency); and Families and Communities as Partners.

DDOE faces significant pressures across these priorities, including a literacy proficiency rate that has fallen from 52% pre-COVID to 38%, persistent elementary-grade chronic absenteeism affecting graduation rates, a teacher pipeline that is not producing educators at the rate needed (particularly in secondary), and a Teacher Residency Program with 130 residents projected for next year but inadequate funding to support the demand.

PSA has a long history of partnership in Delaware, including work with the Principal Network for highest-need schools, the state leadership pipeline, the Christina School District Leadership Academy, principal supervisor development, and educator recruitment and retention systems. PSA is positioned to extend and deepen this work through the Region 3 Comprehensive Center, providing technical assistance to DDOE at no cost to the state.

Service Delivery Approach

Through the Region 3 (Mid-Atlantic) Comprehensive Center, PSA would serve Delaware at three intensities of support. Each tier carries its own profile of quality, intensity, and duration, and the three are designed to reinforce one another.

- **Intensive support** is multi-year, high-touch, embedded technical assistance to DDOE on its highest-leverage strategic plan priorities, co-designed with DDOE leadership and delivered through sustained partnership.
- **Targeted support** is mid-touch, cohort-based work with subsets of DDOE staff, school leaders, or district educators on specific implementation challenges, delivered through structured cycles of professional learning and applied practice.
- **Universal support** is broad-reach, lower-touch resources, tools, and convenings available to all Delaware educators and LEAs, with two regional anchors addressing needs Delaware shares with the rest of the Mid-Atlantic.

Objectives

- Support DDOE's education workforce growth and retention agenda, including scaling the Teacher Residency Program, implementing the Next Ed Workforce teaming model, and positioning DDOE to compete successfully for and execute the Teacher and School Leader (TSL) grant.

- Continue and expand PSA's leadership development work in Delaware, with an emphasis on the principal pipeline, principal supervisor capacity, and grow-your-own models that strengthen instructional leadership across the state.
- Provide substantive technical assistance for DDOE's literacy improvement push, with a focus on evidence-based instruction, coaching, and the conditions under which literacy gains can be sustained.
- Support DDOE in addressing elementary chronic absenteeism, including the parent and family engagement dimensions that are driving the problem.

Scope of Activities by Service Tier

Intensive Support

Quality: senior PSA staff embedded with DDOE leadership and key district partners, with deliverables co-designed and DDOE-approved at every stage; grounded in PSA's prior Delaware work and the evidence base for each priority area.

Intensity: high-touch, with weekly to biweekly working sessions during peak phases and continuous availability for technical assistance.

Duration: 18 months across two paired intensive engagements, with phased ramp-up in months 1–6.

Intensive engagement 1: Education workforce growth and retention (months 1–12)

- Provide technical assistance to scale and strengthen the Delaware Teacher Residency Program, including support for partner alignment, funding strategy, mentor capacity, and residency design.
- Support implementation of the Next Ed Workforce teaming model (drawing on the Arizona State University model DDOE is pursuing), including school readiness assessments, role design, and the teacher career ladder work already underway.
- Provide grant strategy and implementation support for the Teacher and School Leader (TSL) grant, including proposal development support if timing allows, and implementation planning if the grant is awarded.
- Develop and share cross-state evidence on what works in secondary teacher pipeline development, given Delaware's particular shortage in secondary content areas.

Intensive engagement 2: Literacy improvement at the SEA level (months 3–18)

- Provide technical assistance grounded in evidence-based literacy instruction, including the science of reading, high-quality instructional materials, and coaching models that produce sustained gains.
- Support DDOE in identifying and addressing the conditions that contributed to the post-COVID decline, including instructional time, professional learning systems, and school-level implementation supports.
- Connect literacy improvement work to the leadership development work in the targeted tier, recognizing that principal capacity is a primary lever for instructional improvement.

- Support DDOE in building or strengthening the data and assessment systems needed to monitor literacy progress and inform mid-course corrections.

Targeted Support

Quality: cohort-based programming with consistent facilitators, clear competency frameworks, and applied practice between sessions; selection criteria co-designed with DDOE.

Intensity: medium-touch, with monthly cohort sessions, structured between-session work, and embedded coaching for participants.

Duration: 9 to 12 months per cohort, with successive cohorts run over the Center's term.

Principal Network and leadership pipeline cohorts (months 2–18, building on existing PSA work)

- Continue and extend the Principal Network for principals from Delaware's highest-need schools, focused on instructional leadership and effective teaching practices.
- Expand the leadership pipeline continuum for aspiring administrators and teacher leaders, with attention to the principal supervisor level — a group PSA's existing work has identified as essential to building strong school leadership systems.
- Support replication and adaptation of the Christina School District Leadership Academy grow-your-own model in additional districts that have expressed interest.
- Provide technical assistance on educator recruitment and retention systems, including evidence-based practices for attracting, hiring, developing, and retaining high-quality educators.

Elementary chronic absenteeism cohort (months 4–15)

- Recruit a cohort of elementary schools experiencing high chronic absenteeism for structured, cohort-based technical assistance on evidence-based intervention.
- Focus on parent and family engagement dimensions DDOE has identified as central to the problem, including communication, partnership models, and barrier-reduction strategies.
- Support participating schools in developing early warning systems, tiered intervention frameworks, and school-level response protocols that can later scale through universal tools.

Universal Support

Quality: tools and resources peer-reviewed within the Center and field-tested in Delaware contexts; convenings led by content experts and DDOE staff together.

Intensity: low-touch, continuously available, with periodic content refresh.

Duration: ongoing across the full five-year Center term.

Delaware-wide universal services

- Teacher Residency Program scaling toolkit, available to all Delaware districts considering or expanding residency partnerships.

- Leadership pipeline tools and grow-your-own replication kit drawn from the Christina Leadership Academy model.
- Literacy coaching frameworks and evidence syntheses tailored to Delaware's context.
- Chronic absenteeism intervention framework and family engagement supports developed through the targeted cohort and made broadly available.

Universal services with a regional anchor

The Center delivers universal services available to every Mid-Atlantic jurisdiction, with two anchor offerings that address needs Delaware shares with its regional peers. These are continuously available, lower-intensity offerings designed for broad reach and peer learning across state lines.

- **Mid-Atlantic Evidence-Based Literacy Network.** A region-wide peer learning network and resource hub focused on the science of reading, high-quality instructional materials, coaching models, and progress monitoring. Every state in the region has flagged literacy as a priority, with proficiency rates and post-COVID recovery as common concerns. The network offers quarterly cross-state convenings, a shared resource library, a regional community of practice for state literacy leads, and an annual evidence brief on what is working across the region. Quality: grounded in the most current science-of-reading evidence and co-designed with state literacy leads. Intensity: low-touch, continuously available. Duration: ongoing across the full five-year Center term.
- **Mid-Atlantic AI in Education Working Group.** A cross-state working group for SEA staff developing AI governance frameworks, LEA-facing policy guidance, and use-case standards. Every state in the region is grappling with how to govern AI in schools, and no single state has fully figured it out — peer learning across states is particularly valuable here. The working group offers shared policy templates, monthly virtual sessions, an annual in-person convening, and a curated repository of state policies, vendor evaluations, and implementation lessons. Quality: led by AI policy experts working with each state's designated AI lead. Intensity: low-to-medium, with monthly cadence. Duration: ongoing across the full Center term.
- **Regional resource hub and convenings.** Tools, frameworks, briefs, and convenings available to all five jurisdictions, including an annual region-wide Mid-Atlantic education leaders convening, on-demand briefs on emerging policy issues, and access to Center-developed implementation tools. Quality: peer-reviewed and field-tested. Intensity: low-touch. Duration: ongoing.

Deliverables

- Teacher Residency Program scaling toolkit and technical assistance memos (intensive into universal).
- Implementation supports for the Next Ed Workforce teaming model and the teacher career ladder (intensive).
- TSL grant strategy and implementation supports, depending on timing (intensive).
- Principal Network programming, continued and extended (targeted).
- Leadership pipeline tools and grow-your-own replication supports (targeted into universal).

- Literacy technical assistance, coaching frameworks, and evidence syntheses tailored to Delaware's context (intensive into universal).
- Chronic absenteeism intervention framework and family engagement supports (targeted into universal).
- Delaware participation in the Mid-Atlantic Evidence-Based Literacy Network and the Mid-Atlantic AI in Education Working Group (universal).

Assumptions and Dependencies

- DDOE leadership will designate a senior point of contact and provide access to division leads, program staff, and existing district partners.
- The engagement is funded through the Region 3 Comprehensive Center and requires no direct financial contribution from DDOE.
- PSA's work will complement existing DDOE partnerships and vendors, building on rather than duplicating in-progress initiatives.
- Several adjacent opportunities — including AI governance, education funding reform support, data system release preparation, early education expansion, and family and community partnerships — depend on additional decisions or scoping conversations and are addressed separately below.

Estimated Timeline

Approximately 18 months from project initiation. Intensive engagement 1 (workforce) and the leadership pipeline cohorts launch first given their alignment with PSA's existing Delaware work; intensive engagement 2 (literacy) and the chronic absenteeism cohort ramp in over the first quarter; universal services are available from month 1 onward and continue across the full Center term.

Additional Identified Needs and Potential Projects

These are areas where DDOE has flagged clear need but where scope, timing, or readiness conditions suggest they belong outside the core service plan. They are candidates for expanded scope or follow-on engagements as conditions develop.

- **AI guidance and governance.** Delaware has a statewide agreement with ChatGPT and has completed statewide training at no cost to the state, but DDOE has indicated uncertainty about how the technology will be used and difficulty keeping up with the pace of change. PSA could provide intensive support to develop an AI governance framework for DDOE, LEA-facing AI policy guidance, staff training on AI use cases and limits, and integration of AI considerations into the educator workforce and instructional leadership work. Delaware would also benefit from the regional AI working group described above as the universal-tier anchor.
- **Education funding reform.** Delaware's education funding formula has not been substantially changed in over 80 years. The conversation surfaced significant obstacles, including poor data, the absence of accountability structures, and stakeholder reluctance to support reform without accountability commitments. PSA could provide research support, comparative state analyses, and technical assistance on the design questions

that funding reform will require — though the political and stakeholder dimensions of this work suggest it is best approached after the data and accountability conditions are addressed.

- **Data release and public accountability.** Stakeholders are pressing DDOE to release data that has not been made public in several years, with a stated goal of August 2027. This work is closely tied to the funding reform agenda and to broader stakeholder trust. PSA could support the data release strategy, including communications planning, stakeholder engagement design, and the analytical work needed to present the data in ways that are honest, contextualized, and actionable.
- **Bright Beginnings and early education expansion.** Early education center licensing now falls under DDOE, and the agency is working through significant funding and capacity challenges. Delaware will not be moving to universal pre-K, which shapes the scope of what's possible. PSA could support implementation of the licensing transition, cross-system coordination, and evidence-based program design as DDOE's early education portfolio develops.
- **Families and Communities as Partners.** DDOE has identified family and community partnerships as a strategic priority but has been constrained by the absence of state funding to support partner organizations. PSA could provide technical assistance on partnership models that do not require direct state funding, including federally fundable approaches and braided-funding strategies that draw on existing community resources.
- **Data and assessment systems (beyond the public release issue).** The strategic plan calls out data and assessment systems as a Great Teaching and Learning priority. PSA could support specific use cases — for example, early warning indicators, literacy progress monitoring, or the data infrastructure needed to support the workforce career ladder — as discrete projects within this broader area.

Service Plan for Maryland

Supporting MSDE in Blueprint Implementation and Statewide Capacity Building

Status Note

PSA's needs-sensing for Maryland draws on two MSDE conversations — with Matt Duque (Director of Research, Office of Research and Evaluation) and Richard Kincaid (Assistant State Superintendent, Division of College and Career Pathways) — together with PSA's prior R4CC partnership record in the State. The two perspectives are complementary: Duque surfaced research, instructional-materials, and coordination priorities across Blueprint implementation, while Kincaid emphasized College and Career Pathways priorities (Blueprint Pillar 3). The plan below reflects a balance of both, alongside PSA's documented Maryland work, and would be refined further through continued needs sensing during the project period.

Background

The Maryland State Department of Education (MSDE) is five years into implementation of the Blueprint for Maryland's Future, the state's comprehensive education reform and funding framework. Implementation is intensive across multiple fronts: a career ladder for educators with baseline metrics expected in 2027–28, collaborative time targets, fiscal and operational handoffs from the Accountability and Implementation Board (AIB) to MSDE, an ambitious 45% registered apprenticeship target, and the continued expansion of community schools (now half of all schools statewide). MSDE is simultaneously implementing new literacy and math policies, supporting high-quality instructional materials adoption, revising the school accountability system, and standing up a new assessment system.

PSA, through the prior Region 4 Comprehensive Center (R4CC), has a substantial partnership record in Maryland. R4CC partnered with MSDE on HQIM frameworks across ELA, math, science, and social studies; CSI school monitoring tools; the cross-functional school improvement team; the Work-Based Learning Continuum; the Maryland Transitions and Linkage Tool with REL Mid-Atlantic; and Blueprint stakeholder engagement. R4CC also supported leadership pipeline work across multiple districts and statewide associations, including the Next Level Maryland Leadership Academy (with MAESP and MASSP), the Maryland Superintendent Academy and New Superintendent Academy (with PSSAM, including PSSAM's first strategic plan in 74 years), and district-level grow-your-own programs in Calvert, Queen Anne's, Talbot, and Eastern Shore districts.

Service Delivery Approach

Through the Region 3 (Mid-Atlantic) Comprehensive Center, PSA would serve Maryland at three intensities of support. Each tier carries its own profile of quality, intensity, and duration, designed to reinforce one another and to honor Matt Duque's observation that MSDE is doing many things at once and needs collaborative, non-duplicative support that coordinates well with existing TA providers (WestEd, AIB, REL, Center for Assessment, Towson's Center for Community Schools, and others).

- **Intensive support** is multi-year, high-touch, embedded technical assistance to MSDE on Blueprint implementation priorities and statewide capacity building, co-designed with MSDE leadership.
- **Targeted support** is mid-touch, cohort-based work building on PSA's prior leadership-pipeline partnerships and on district-level Blueprint implementation needs, delivered through structured cohorts and networks.
- **Universal support** is broad-reach, lower-touch resources, tools, and convenings available statewide, with two regional anchors addressing needs Maryland shares with the rest of the Mid-Atlantic.

Objectives

- Support MSDE in advancing Blueprint implementation at the SEA level, particularly the career ladder rollout, collaborative time measurement, and the fiscal and operational transitions from AIB to MSDE.
- Continue and extend PSA's leadership pipeline work in Maryland, including the Next Level Maryland Leadership Academy, the Maryland Superintendent Academies, and district-level grow-your-own partnerships.
- Build MSDE's capacity to measure HQIM implementation and support coherence across instruction and districts.
- Coordinate closely with REL Mid-Atlantic and other federally funded centers, as well as MSDE's other TA partners, to deliver non-duplicative support.
- Support MSDE's College and Career Pathways priorities (Blueprint Pillar 3), including Career-Connected Learning implementation, scaling of the COMAR Six-Year Plan, and development of K–12 instructional AI guidance, in coordination with the Division of College and Career Pathways.

Scope of Activities by Service Tier

Intensive Support

Quality: senior PSA staff embedded with MSDE leadership, with deliverables co-designed and MSDE-approved; building on PSA's prior R4CC partnership credibility and rooted in MSDE's stated priorities.

Intensity: high-touch, with biweekly working sessions during peak phases and continuous availability for technical assistance.

Duration: 18 to 24 months across two paired intensive engagements, with phased ramp-up in months 1–6.

Intensive engagement 1: Blueprint implementation support at the SEA level (months 1–18)

- Support MSDE in operationalizing the career ladder, including baseline metrics design, district planning support, and data quality work in advance of the 2027–28 measurement year.

- Provide technical assistance on collaborative time measurement and implementation, given the wide variability across districts.
- Support the fiscal and operational handoffs from AIB to MSDE, including capacity building for MSDE to take on district support functions previously held by AIB.
- Coordinate with MSDE's other TA partners (WestEd, AIB, REL, Center for Assessment, Towson) so support is complementary rather than duplicative.

Intensive engagement 2: HQIM implementation measurement and instructional coherence (months 3–18)

- Continue and extend PSA's prior R4CC work on HQIM frameworks and rubrics across ELA, math, science, and social studies.
- Develop MSDE's capacity to measure HQIM implementation across districts, including district materials usage analysis, classroom-level signals, and feedback to inform refinement.
- Support the broader push for instructional coherence — alignment of instruction, terminology, and materials across districts — that Teaching and Learning has prioritized.
- Connect HQIM work to the new math policy (integrated algebra, MTSS, post-CCR pathways) and the literacy policy implementation.

Targeted Support

Quality: cohort-based programming building on R4CC's track record with Maryland associations and districts, including documented outcomes (75% of districts reached through the aspiring-leader academy, 42% promotion rates, PSSAM's first strategic plan in 74 years).

Intensity: medium-touch, with monthly cohort sessions, structured between-session work, and embedded coaching.

Duration: 9 to 12 months per cohort, with successive cohorts run over the Center's term.

Statewide leadership pipeline cohorts (months 2–18, building on R4CC work)

- Continue the Next Level Maryland Leadership Academy in partnership with MAESP and MASSP, delivering the four-level (foundation, transformation, elevation, promotion) sequence.
- Continue the Maryland Superintendent Academy and New Superintendent Academy with PSSAM, given the ongoing need (more than half of Maryland districts experienced superintendent vacancies in 2022–24).
- Sustain PSSAM's organizational growth following the strategic plan PSA helped produce.
- Continue district-level partnerships in Calvert, Queen Anne's, Talbot, and the Eastern Shore Consortium as MSDE and the districts wish.

District Blueprint implementation cohort (months 4–15)

- Recruit a cohort of districts working through the same Blueprint implementation challenges (career ladder planning, collaborative time, community schools coordination) for peer learning and shared problem-solving.

- Develop and refine implementation tools that emerge from cohort work and scale to other districts through the universal tier.

Universal Support

Quality: tools and resources peer-reviewed within the Center and field-tested in Maryland contexts; building on the HQIM frameworks, CSI monitoring tools, and Work-Based Learning Continuum already developed under R4CC.

Intensity: low-touch, continuously available, with periodic content refresh.

Duration: ongoing across the full five-year Center term.

Maryland-wide universal services

- HQIM frameworks and rubrics, refreshed and expanded to support implementation measurement (building on R4CC work).
- CSI monitoring tool and process, available to MSDE for sustained use.
- The Maryland Transitions and Linkage Tool (MTLT) for streamlining post-secondary planning for students receiving special education services.
- Work-Based Learning Continuum and CTE landscape resources.
- Blueprint implementation tools developed through the targeted district cohort and made broadly available.

Universal services with a regional anchor

The Center delivers universal services available to every Mid-Atlantic jurisdiction, with two anchor offerings that address needs Maryland shares with its regional peers. These are continuously available, lower-intensity offerings designed for broad reach and peer learning across state lines.

- **Mid-Atlantic Evidence-Based Literacy Network.** A region-wide peer learning network and resource hub focused on the science of reading, high-quality instructional materials, coaching models, and progress monitoring. Every state in the region has flagged literacy as a priority, with proficiency rates and post-COVID recovery as common concerns. The network offers quarterly cross-state convenings, a shared resource library, a regional community of practice for state literacy leads, and an annual evidence brief on what is working across the region. Quality: grounded in the most current science-of-reading evidence and co-designed with state literacy leads. Intensity: low-touch, continuously available. Duration: ongoing across the full five-year Center term.
- **Mid-Atlantic AI in Education Working Group.** A cross-state working group for SEA staff developing AI governance frameworks, LEA-facing policy guidance, and use-case standards. Every state in the region is grappling with how to govern AI in schools, and no single state has fully figured it out — peer learning across states is particularly valuable here. The working group offers shared policy templates, monthly virtual sessions, an annual in-person convening, and a curated repository of state policies, vendor evaluations, and implementation lessons. Quality: led by AI policy experts working with each state's designated AI lead. Intensity: low-to-medium, with monthly cadence. Duration: ongoing across the full Center term.

- **Regional resource hub and convenings.** Tools, frameworks, briefs, and convenings available to all five jurisdictions, including an annual region-wide Mid-Atlantic education leaders convening, on-demand briefs on emerging policy issues, and access to Center-developed implementation tools. Quality: peer-reviewed and field-tested. Intensity: low-touch. Duration: ongoing.

Deliverables (Preliminary)

- Career ladder operationalization tools and data quality supports for MSDE (intensive).
- HQIM implementation measurement framework and district usage analyses (intensive into universal).
- Continued Next Level Maryland Leadership Academy programming (targeted).
- Continued Superintendent Academy and New Superintendent Academy programming (targeted).
- District Blueprint implementation cohort tools and shared learning briefs (targeted into universal).
- Refreshed CSI monitoring tools and Work-Based Learning Continuum supports (universal).
- Maryland participation in the Mid-Atlantic Evidence-Based Literacy Network and the Mid-Atlantic AI in Education Working Group (universal).

Assumptions and Dependencies

- MSDE leadership will designate a senior point of contact and confirm priorities through additional needs-sensing conversations beyond the initial interview with Matt Duque.
- The engagement is funded through the Region 3 Comprehensive Center and requires no direct financial contribution from MSDE.
- PSA's work will coordinate closely with MSDE's other TA partners (WestEd, AIB, REL Mid-Atlantic, Center for Assessment, Towson's Center for Community Schools, and others) so support is non-duplicative.
- Final scope, sequence, and deliverables are subject to refinement once additional MSDE conversations are complete.

Estimated Timeline

Approximately 18 to 24 months from project initiation, with intensive engagement 1 (Blueprint at the SEA level) and the leadership pipeline cohorts launching first given their alignment with R4CC partnership work; intensive engagement 2 (HQIM measurement) ramping in over the first quarter; and universal services available from month 1 onward and continuing across the full Center term.

Additional Identified Needs and Potential Projects

These are areas where MSDE has flagged need but where scope or readiness conditions warrant further conversation. They are candidates for expanded scope as the partnership develops.

- **Principal Academy continuation.** MSDE has recently reimagined the Principal Academy and signaled ongoing interest. PSA could support continuation and refinement, integrating with the Next Level Maryland Leadership Academy work.
- **Apprenticeship expansion.** Maryland's 45% registered apprenticeship target is ambitious and will require coordination across MSDE, employers, and IHEs. PSA could support the cross-system coordination, employer engagement design, and measurement work this scaling will require.
- **Community schools coordination.** Community schools now constitute half of all schools statewide. PSA could support cross-system coordination, particularly with Towson's Center for Community Schools, on implementation quality and measurement.
- **Assessment and accountability overhaul.** MSDE is revising school accountability and launching a new assessment system in partnership with the Center for Assessment. PSA could support stakeholder engagement, communications, and implementation planning around these transitions.
- **Special education certificate-to-diploma pathways.** MSDE is scanning other states on students who earn a certificate rather than a regular diploma. PSA could support comparative state analysis and design work as this priority develops.
- **Coordination across TA providers.** Matt Duque welcomed the new charge to coordinate closely with RELs and other federally funded centers. PSA could play an explicit coordination role, facilitating a regular cross-TA-provider table to ensure aligned, non-duplicative support to MSDE.
- **Instructional coaching scale-up.** MSDE has received new funding building on an existing pilot. PSA could support the scale-up design, coach development model, and measurement of coaching effectiveness.
- **Educator pipeline and grow-your-own.** State-level grants have recently been awarded to districts; an evaluation is underway. PSA could connect this work to the leadership pipeline cohorts and to PSA's prior Delaware Christina Leadership Academy model as a region-wide grow-your-own resource.

New Jersey Service Plan

Policy Studies Associates (PSA) is applying to the U.S. Department of Education to operate the Region 3 (Mid-Atlantic) Comprehensive Center, a federally funded technical-assistance center under the FY 2026 Comprehensive Centers competition, serving Delaware, the District of Columbia, Maryland, New Jersey, and Pennsylvania. If PSA is selected, it would partner with New Jersey to help the Department of Education (NJDOE) advance the Commissioner's priorities — from modernizing school funding to strengthening literacy and mathematics — by building capacity both inside the agency and in the districts it serves, with particular attention to high-need communities. The Center would be funded through the Comprehensive Centers Program, allowing PSA to provide this support at no cost to the State, and the work would be built around New Jersey's own needs and learning agenda. Since PSA led this same five-jurisdiction Center from 2019 to 2024 — when NJDOE came to regard the team as integrated seamlessly into the agency — it would begin already knowing NJDOE and New Jersey's context, allowing for a running start rather than a year of ramp-up. PSA will submit its application by the Department's June 30, 2026 deadline.

About the Center

The Region 3 (Mid-Atlantic) Comprehensive Center is one of the federally funded Regional Centers that PSA is applying to establish and operate under the U.S. Department of Education's FY 2026 Comprehensive Centers competition. Through this program, expert organizations provide capacity-building support to state education agencies, districts, and schools. PSA will submit its application this June, with selected Centers anticipated to begin work in the 2026–27 school year. Unlike a single-topic national center, a Regional Center has no fixed subject: its agenda is set by the states it serves.

Client-driven, built around New Jersey's priorities. The Center does not arrive with a pre-set program. NJDOE names the high-leverage problems it most wants to solve, and the Center builds an annual service plan around them, drawing on New Jersey's own learning agenda and data. Consistent with the program's central focus, the work gives particular weight to strengthening core instruction in literacy and mathematics, which aligns with Commissioner Laux's emphasis on the science of reading, while remaining flexible enough to support whatever priorities the State sets.

A trusted partner that already knows the agency. PSA brings more than four decades of work in education research, evaluation, and technical assistance. From 2019 to 2024, PSA led the federal Comprehensive Center serving this exact five-jurisdiction region, working so closely with NJDOE that the agency described the team as integrated seamlessly into its offices and a thought partner rather than an outside vendor. The Center would again partner with SRI International—a collaborator throughout that work—and would add NORC at the University of Chicago, which currently leads two of the Department's Regional Comprehensive Centers, to bring nationally recognized content expertise and rigorous, independent evidence to New Jersey's work.

How the Center works. The Center starts with a shared needs assessment, then co-designs the work with NJDOE. Support comes at three levels of intensity—intensive, targeted, and universal—described below. In New Jersey, the Center would work at two levels: (1) strengthening NJDOE's internal

coordination across divisions and delivering through NJDOE and the State's 21 county offices of education, a ready statewide network that extends reach and shares cost; and (2) coordinating with REL Mid-Atlantic through joint planning and a shared advisory board, as the program requires.

Why a New Jersey Partnership, and Why Now

New Jersey has set an ambitious agenda for the next phase of its work. Under Commissioner Laux, NJDOE is focused on modernizing and stabilizing the school funding formula, improving literacy outcomes, expanding high-impact tutoring, expanding access to preschool, and strengthening the educator pipeline. These priorities are backed by a record State investment in K-12 education and a renewed push for shared services and more efficient spending. Turning that agenda into consistent local practice, with clear plans, practical tools, reliable data, and steady follow-through across 1.4 million students and 593 districts, and an agency whose offices pull in the same direction, is exactly what a Comprehensive Center is built to do.

It is also work PSA has already done in New Jersey. As lead partner for the Mid-Atlantic Comprehensive Center from 2019 to 2024, PSA helped NJDOE become a more coherent, better-coordinated agency—and helped it reach districts more effectively:

- **Maximizing Federal Funds.** PSA helped NJDOE design and build the Maximizing Federal Funds website—now a flagship resource that helps districts plan strategic, sustainable use of federal dollars—working seamlessly across program offices to create the content. In one recent year the resource drew nearly 2,400 visits from some 1,370 users.
- **Streamlining local needs assessments.** PSA facilitated a cross-agency working group spanning 16 NJDOE offices to map comprehensive needs-assessment requirements across federal and State programs and began developing a single coordinated tool—reducing duplicative burden on districts while strengthening needs identification and data use. As a neutral facilitator, the Center made discussions possible that no single office could have led.
- **Individualized Student Learning Opportunities (ISLO).** PSA helped NJDOE make sense of how districts were interpreting the State's ISLO graduation provision, then produced guidance, a model policy, and tools that gave districts a clearer, more consistent path to expanding student opportunity.
- **Early learning and the educator pipeline.** PSA supported NJDOE's PreK-3 work with a research-based guidebook for families and educators, and spent three years analyzing the State's teacher-shortage drivers — surfacing obstacles in preparation, certification, and recruitment and pointing toward practical solutions.

Across the region, PSA delivered comparable results for New Jersey's peers, from the District of Columbia's first Graduate Profile, to Pennsylvania's educator-pipeline and school-improvement work, to Maryland's statewide Work-Based Learning Continuum, so the Center would bring not only New Jersey experience but a working knowledge of every jurisdiction it serves.

How the Partnership Would Help New Jersey

If PSA is selected, New Jersey would be served at three intensities — intensive, targeted, and universal. Each is described below in terms of quality, intensity, and duration. The Center would coordinate with REL Mid-Atlantic through joint planning and a shared advisory board, and would hand its work off over time so capacity stays with NJDOE, the county offices, and district teams. Because the work is federally funded, it requires no state match.

Intensive Support

Senior PSA staff partnering with NJDOE leadership, with deliverables co-designed and NJDOE-approved at every stage. Intensity: high-touch, with weekly to biweekly working sessions during peak phases. Duration: 18 to 24 months across paired engagements, with phased ramp-up.

- **Align NJDOE funding decisions to State priorities.** Help NJDOE map funding streams and grant-administration practices across divisions, build a decision framework linking the Commissioner's priorities to funding and cross-divisional coordination, pilot it with one or two divisions, and refresh the Maximizing Federal Funds resource to extend beyond federal funds into broader statewide budgeting (detailed in Appendix B).
- **Build NJDOE's capacity to use data.** Pair the Center's diagnostic and data expertise with NJDOE's priorities to help the agency audit its data systems, design role-based data tools, train staff, and establish data-governance practices so NJDOE can answer its own priority questions and respond quickly to districts.
- **Focus on what moves results.** Use the Center's diagnostic process to help NJDOE and partner districts identify the few priorities most likely to improve student outcomes each year, and build focused, NJDOE-approved plans around them. This is the connective tissue across the intensive engagements above.

Targeted Support

Cohort-based programming and networks of practice with consistent facilitators, structured cycles of applied practice, and selection co-designed with NJDOE and the 21 county offices of education. Intensity: medium-touch, with monthly sessions and structured between-session work. Duration: 9 to 18 months per cohort, with successive cohorts over the Center's term.

- **Accelerate achievement in literacy and mathematics through district cohorts.** Help selected districts select and implement evidence-based instructional materials and practices, including the science of reading, and build the coaching, professional learning, and progress monitoring that turn strategy into stronger results in classrooms.
- **Educator recruitment, preparation, and retention.** Build on PSA's multi-year analysis of New Jersey's teacher shortage, reviewing staffing data by county and subject, developing a district-facing recruitment-and-retention toolkit, supporting grow-your-own and preparation pathways, and facilitating Communities of Practice across NJDOE, county offices, and districts.
- **Expand high-impact tutoring.** Serve as a trusted research partner tracking tutoring implementation and outcomes across district cohorts, helping NJDOE set performance standards, learn what is working, and steer the State's growing tutoring investment toward results.
- **Data analytics—support a streamlined process...Cross-office and county-office networks of practice.** Convene NJDOE divisions and county offices in structured networks of practice, building shared language and aligned guidance (as the streamlined needs-assessment work did) so districts receive clearer, less duplicative direction tied to the priorities above. DATA

Marry school funding and performance...to understand that is our goal. That's what we're trying to solve for in the fudngin.

Universal Support

Tools and resources peer-reviewed within the Center and field-tested in New Jersey contexts; convenings led by content experts and NJDOE staff together; delivered statewide through the 21 county offices of education. Intensity: low-touch, continuously available. Duration: ongoing across the full Center term, with periodic content refresh.

- **Refreshed Maximizing Federal Funds resource.** A rebuilt district-facing resource reflecting current spending flexibilities and the Department's priorities, and extending beyond federal funds into broader statewide budgeting, available to every New Jersey district through NJDOE and the county offices.
- **Recruitment and retention toolkits.** Tools developed and refreshed through targeted cohort work, made statewide-available, building on PSA's multi-year analysis of New Jersey's teacher shortage.
- **Data tools and governance templates.** Role-based data tools and data-governance templates developed through the agency's data-capacity work, refreshed and broadened in scope, with ongoing availability to NJDOE and the county offices.
- **Coordinated guidance and needs-assessment tools.** Shared needs-assessment and cross-office coordination tools developed through the agency's coherence work, made statewide-available so districts receive clearer, less duplicative guidance.

Universal services with a regional anchor. The Center also delivers universal services open to every Mid-Atlantic jurisdiction. Two anchor offerings address needs New Jersey shares with its regional peers; both are continuously available and built for broad reach and cross-state peer learning.

- **Mid-Atlantic Evidence-Based Literacy Network.** A region-wide peer learning network and resource hub focused on the science of reading, high-quality instructional materials, coaching models, and progress monitoring. Every state in the region has flagged literacy as a priority, with proficiency rates and post-COVID recovery as common concerns. The network offers quarterly cross-state convenings, a shared resource library, a regional community of practice for state literacy leads, and an annual evidence brief on what is working across the region. Quality: grounded in the most current science-of-reading evidence and co-designed with state literacy leads. Intensity: low-touch, continuously available. Duration: ongoing across the full five-year Center term.
- **Mid-Atlantic AI in Education Working Group.** A cross-state working group for SEA staff developing AI governance frameworks, LEA-facing policy guidance, and use-case standards. Every state in the region is grappling with how to govern AI in schools, and no single state has fully figured it out — peer learning across states is particularly valuable here. The working group offers shared policy templates, monthly virtual sessions, an annual in-person convening, and a curated repository of state policies, vendor evaluations, and implementation lessons. Quality: led by AI policy experts working with each state's designated AI lead. Intensity: low-to-medium, with monthly cadence. Duration: ongoing across the full Center term.
- **Regional resource hub and convenings.** Tools, frameworks, briefs, and convenings available to all five jurisdictions, including an annual region-wide Mid-Atlantic education leaders convening, on-

demand briefs on emerging policy issues, and access to Center-developed implementation tools. Quality: peer-reviewed and field-tested. Intensity: low-touch. Duration: ongoing.

How the Partnership Would Work

If PSA is selected to operate the Center, NJDOE would be the lead partner and would shape and approve the plan. The three service tiers above are delivered through three connected tracks:

- **Inside NJDOE.** A small, trusted team would work across divisions, as it did on Maximizing Federal Funds and needs-assessment streamlining, to align policy, guidance, and funding with the Commissioner's priorities, especially in literacy and mathematics.
- **With districts and county offices.** The Center would work intensively with a focused set of districts, weighted toward high-need communities, and deliver through the State's 21 county offices of education to reach every corner of New Jersey.
- **Across the region.** Tools, convenings, and peer-learning networks shared across all five Mid-Atlantic jurisdictions would let New Jersey learn from and contribute to the broader region.

Throughout, the Center would coordinate with REL Mid-Atlantic through joint planning and a shared advisory board, and would progressively hand off its work to NJDOE, the county offices, and district teams so capacity stays with New Jersey after the partnership ends.

What Success Would Look Like

- In the first year, NJDOE has a working framework for aligning funding to its priorities and clearer cross-office coordination; partner districts have focused, NJDOE-approved plans; teachers and school leaders report stronger capacity to deliver and support high-quality literacy and mathematics instruction; and New Jersey is actively contributing to and learning from the Mid-Atlantic Evidence-Based Literacy Network and the Mid-Atlantic AI in Education Working Group.
- Over two to three years, NJDOE operates more coherently across divisions and districts receive clearer, less duplicative guidance; more students are taught by effective, well-supported teachers led by strong principals; districts implement evidence-based literacy and math strategies with fidelity; and NJDOE issues policy or funding guidance that makes the new approaches easier to sustain.
- Over the longer term, improvements are sustained on stable funding, and participating schools show measurable gains in reading and mathematics, broader academic performance, and attendance — especially among students with the greatest need.

Appendix B

Illustrative Detail: Aligning NJDOE Funding Decisions to State Priorities

The Center brings no fixed program to any priority. The specifics below illustrate the depth of intensive support available within a single priority area; the actual scope, sequence, and tools would be developed jointly with NJDOE and reflected in the annual service plan. New Jersey has clearly stated priorities and a renewed focus on efficient spending, creating an opportunity to organize the Department's own funding decisions around them — the prerequisite to issuing credible updated guidance to districts. The Center could help NJDOE align and coordinate those decisions in a disciplined way, the foundation for clearer guidance to the field.

The Center could help NJDOE develop:

- **An internal landscape and diagnostic.** A structured review of NJDOE's major federal and State funding streams — how each is administered, which division owns it, and where decisions drift from stated priorities — with interviews of division leads and a feedback memo summarizing findings.
- **An internal alignment framework.** A decision framework linking the Commissioner's priorities to funding allocation, grant administration, and cross-divisional coordination, with practical tools the diagnostic surfaces — a priority-to-funding crosswalk, a coordination protocol, or redesigned grant-application architecture — piloted with one or two divisions and refined.
- **Staff capacity to sustain it.** Working sessions with division leadership and staff, concise reference materials, and identified NJDOE "owners" so the framework remains usable beyond the engagement.
- **Refreshed district-facing guidance.** A rebuilt Maximizing Federal Funds resource that reflects current spending flexibilities and the Department's priorities, extends beyond federal funds into broader statewide budgeting — consolidation, shared services, total cost — and surfaces concrete New Jersey examples as primary content.

Result for New Jersey: NJDOE would practice internally the discipline its guidance asks of districts — funding decisions organized around priorities, clearer coordination across divisions, and a district-facing resource grounded in how the Department itself operates. This same depth — diagnostic, framework, staff capacity, and refreshed guidance — is available across any priority New Jersey sets, in proportion to the priorities named in the annual service plan.

Pennsylvania Service Plan

About the Center

The Region 3 (Mid-Atlantic) Comprehensive Center is one of the federally funded Regional Centers that PSA is applying to establish and operate under the U.S. Department of Education's FY 2026 Comprehensive Centers competition. Through this program, expert organizations provide capacity-building support to state education agencies, districts, and schools. PSA will submit its application this June, with selected Centers anticipated to begin work in the 2026–27 school year. Unlike a single-topic national center, a Regional Center has no fixed subject: its agenda is set by the states it serves.

Client-driven, built around Pennsylvania's priorities. The Center does not arrive with a pre-set program. PDE names the high-leverage problems it most wants to solve, and the Center builds an annual service plan around them, drawing on Pennsylvania's own learning agenda and data. Consistent with the program's central focus, the work gives particular weight to accelerating student achievement in math and literacy, which aligns with Secretary Rowe's emphasis on structured literacy, while remaining flexible enough to support whatever priorities Pennsylvania sets.

A trusted provider with deep Pennsylvania roots. PSA brings more than four decades of work in education research, evaluation, and technical assistance. From 2019 to 2024, PSA led the federal Comprehensive Center serving this exact five-jurisdiction region — Delaware, the District of Columbia, Maryland, New Jersey, and Pennsylvania — so the Center would begin already knowing PDE, the Commonwealth's context, and every one of its regional peers. PSA would again partner with SRI International, NORC at the University of Chicago, and the Education Policy and Leadership Center (EPLC) to bring nationally recognized content expertise and independent, rigorously reviewed evidence to Pennsylvania's work.

How the Center works. The Center meets each partner where they are, beginning with a shared needs assessment and then co-designing the work. It delivers support at three levels of intensity — each carrying its own profile of quality, intensity, and duration — detailed below. In Pennsylvania, the Center would deliver through PDE and the Commonwealth's 29 intermediate units, a ready statewide network that extends reach and shares cost — and would coordinate with REL Mid-Atlantic through joint planning and a shared advisory board, as the program requires.

How the Center Leads to Results

The Center's work follows a clear path: from the support it provides, to stronger systems and instruction, to conditions that endure, to results for students. A full logic model detailing inputs, activities, outcomes, and measures is available as an attachment.

Why a Pennsylvania Partnership, and Why Now

Pennsylvania is making historic new investments in its public schools, including a strengthened adequacy formula that directs additional dollars to the districts with the greatest need, following the 2023 Commonwealth Court ruling on school funding. The opportunity now is to make those

investments count in classrooms, particularly in high-need, rural, and high-poverty communities, and to keep momentum on the priorities Secretary Rowe has named: structured literacy, teacher recruitment and retention, student well-being, and stronger pathways from high school to postsecondary education and careers. Translating statewide priorities into consistent local practice with clear plans, practical tools, reliable data, and sustained follow-through across more than 1.7 million students and hundreds of districts is exactly the kind of capacity-building a Comprehensive Center is built to provide.

It is also work PSA has already done in Pennsylvania. As lead partner for the Mid-Atlantic Comprehensive Center from 2019 to 2024, PSA worked directly with PDE and Pennsylvania partners on the educator workforce and school improvement:

- **STEM teacher pipeline.** PSA helped the Philadelphia Regional Institute for STEM Educators (PRISE) build a sustainable governance framework, strategic plan, and measures of effectiveness to expand the supply of well-prepared STEM teachers, work that reached more than 1,200 aspiring and current teachers.
- **Pennsylvania Educator Diversity Consortium (PEDC).** Over four years, PSA supported PEDC's growth from a PDE-funded initiative into an independent statewide organization, from six university partners to more than 500 members across 200-plus organizations, and helped produce three practical toolkits for educator training, recruitment, and retention.
- **Pennsylvania Roadmap for Educational Improvement.** PSA worked with PDE leadership to build a statewide improvement roadmap spanning the agency's offices and external partners, organized around six pillars including data use, family and community engagement, and academic outcomes.
- **Skilled support for school improvement.** PSA partnered with PDE to train 60 school-improvement facilitators serving roughly 700 schools, and built the Communities of Practice, facilitator guide, and procedures that let PDE sustain the work after the initial training — a hallmark of how PSA leaves lasting capacity in place.

Across the region, PSA delivered comparable results for Pennsylvania's peers, from the District of Columbia's first Graduate Profile, to New Jersey's Maximizing Federal Funds and P–3 alignment resources, to Maryland's statewide Work-Based Learning Continuum, so the Center would bring not only Pennsylvania experience but a working knowledge of every jurisdiction it serves.

How the Partnership Would Help Pennsylvania

If PSA is selected to operate the Center, Pennsylvania would be served at three intensities of support — intensive, targeted, and universal — each with its own profile of quality, intensity, and duration. The Center would coordinate with REL Mid-Atlantic through joint planning and a shared advisory board, and would progressively hand off its work so capacity stays with PDE, the intermediate units, and district teams after the partnership ends. Because the partnership is federally funded, it requires no state match.

Intensive Support

Quality: senior PSA staff partnering with PDE leadership and selected high-need, rural, and high-poverty districts, with deliverables co-designed and PDE-approved at every stage.

Intensity: high-touch, with weekly to biweekly working sessions during peak phases. **Duration:** 18 to 24 months across paired engagements, with phased ramp-up.

- **Statewide bell-to-bell cell-phone standard implementation.** As Pennsylvania moves toward a statewide bell-to-bell cell-phone standard, help PDE develop a clear implementation framework, model policies, professional learning, and family resources with monitoring tools to track climate, engagement, and unintended effects (detailed in Appendix A).
- **Make new investments count in high-need schools.** Pair the Center's federal- and state-funding expertise with Pennsylvania's adequacy investments to help high-need, rural, and high-poverty districts align funds to evidence-based strategies and sustain them beyond a single budget cycle.
- **Focus on what moves results.** Use the Center's diagnostic process to help PDE and partner districts identify the few priorities most likely to improve student outcomes each year, and build focused, PDE-approved plans around them. This is the connective tissue across the intensive engagements above.

Targeted Support

Quality: cohort-based programming and networks of practice with consistent facilitators, structured cycles of applied practice, and selection co-designed with PDE and the 29 intermediate units. **Intensity:** medium-touch, with monthly sessions and structured between-session work. **Duration:** 9 to 18 months per cohort, with successive cohorts over the Center's term.

- **Accelerate achievement in math and literacy through district cohorts.** Help selected districts select and implement evidence-based instructional materials and practices, including structured literacy, and build the coaching, professional learning, and progress monitoring that turn strategy into stronger results in classrooms.
- **Educator recruitment, preparation, and retention.** Build on PSA's prior Pennsylvania workforce work, reviewing staffing data by region and subject, updating recruitment and retention tools, supporting grow-your-own and preparation pathways, and facilitating Communities of Practice across PDE, IUs, and districts.
- **Career readiness and regional partnerships.** Help PDE and intermediate units strengthen Career Ready PA pathways through district cohorts — mapping dual-credit, work-based learning, and employer partnerships, and creating measures for participation, credential attainment, and postsecondary and workforce outcomes.
- **School improvement Communities of Practice.** Continue and extend the Communities of Practice infrastructure PSA built with PDE — the network of school-improvement facilitators serving roughly 700 schools — so the work persists with new content tied to the priorities above.

Universal Support

Quality: tools and resources peer-reviewed within the Center and field-tested in Pennsylvania contexts; convenings led by content experts and PDE staff together; delivered statewide through the 29 intermediate units. **Intensity:** low-touch, continuously available. **Duration:** ongoing across the full Center term, with periodic content refresh.

- **Student health, safety, and well-being resources.** Model policies, family resources, and student-facing materials emerging from the cell-phone standard implementation work, available to every Pennsylvania district through PDE and the intermediate units.
- **Recruitment and retention toolkits.** Tools updated and refreshed through targeted cohort work, made statewide-available, building on the three PEDC toolkits for educator training, recruitment, and retention.
- **School improvement tools.** The facilitator guide and Communities of Practice procedures PSA built with PDE, refreshed and broadened in scope, with ongoing availability to PDE and the IUs.
- **Career Ready PA pathway maps and measures.** Tools developed through targeted cohort work, made statewide-available.

Universal services with a regional anchor

The Center delivers universal services available to every Mid-Atlantic jurisdiction, with two anchor offerings that address needs Pennsylvania shares with its regional peers. These are continuously available, lower-intensity offerings designed for broad reach and peer learning across state lines.

- **Mid-Atlantic Evidence-Based Literacy Network.** A region-wide peer learning network and resource hub focused on the science of reading, high-quality instructional materials, coaching models, and progress monitoring. Every state in the region has flagged literacy as a priority, with proficiency rates and post-COVID recovery as common concerns. The network offers quarterly cross-state convenings, a shared resource library, a regional community of practice for state literacy leads, and an annual evidence brief on what is working across the region. Quality: grounded in the most current science-of-reading evidence and co-designed with state literacy leads. Intensity: low-touch, continuously available. Duration: ongoing across the full five-year Center term.
- **Mid-Atlantic AI in Education Working Group.** A cross-state working group for SEA staff developing AI governance frameworks, LEA-facing policy guidance, and use-case standards. Every state in the region is grappling with how to govern AI in schools, and no single state has fully figured it out — peer learning across states is particularly valuable here. The working group offers shared policy templates, monthly virtual sessions, an annual in-person convening, and a curated repository of state policies, vendor evaluations, and implementation lessons. Quality: led by AI policy experts working with each state's designated AI lead. Intensity: low-to-medium, with monthly cadence. Duration: ongoing across the full Center term.
- **Regional resource hub and convenings.** Tools, frameworks, briefs, and convenings available to all five jurisdictions, including an annual region-wide Mid-Atlantic education leaders convening, on-demand briefs on emerging policy issues, and access to Center-developed implementation tools. Quality: peer-reviewed and field-tested. Intensity: low-touch. Duration: ongoing.

How the Partnership Would Work

If PSA is selected to operate the Center, PDE would be the lead partner and would shape and approve the plan. The three service tiers above are delivered through three connected tracks:

- **With PDE.** A small cross-office team would meet regularly with Center staff to align state policy, guidance, and funding with the priorities in the annual service plan, especially in math and literacy.
- **With districts and intermediate units.** The Center would work intensively with a focused set of districts, weighted toward high-need communities, and deliver through Pennsylvania's 29 intermediate units to extend reach and share cost across the Commonwealth.
- **Across the region.** Tools, convenings, and peer-learning networks shared across all five Mid-Atlantic jurisdictions would let Pennsylvania learn from and contribute to the broader region.

Throughout, the Center would coordinate with REL Mid-Atlantic through joint planning and a shared advisory board, and would progressively hand off its work to PDE, the intermediate units, and district teams so capacity stays with Pennsylvania after the partnership ends. Because the partnership is federally funded, it requires no state match.

What Success Would Look Like

- **In the first year,** partner districts have focused, PDE-approved plans; teachers and school leaders report stronger capacity to deliver and support high-quality math and literacy instruction; PDE has practical tools and routines ready to scale; and Pennsylvania is actively contributing to and learning from the Mid-Atlantic Evidence-Based Literacy Network and the Mid-Atlantic AI in Education Working Group.
- **Over two to three years,** more students are taught by effective, well-supported teachers led by strong principals; teacher and leader retention improves in participating high-need schools; districts implement evidence-based math and literacy strategies with fidelity; and Pennsylvania issues policy or funding guidance that makes the new approaches easier to sustain.
- **Over the longer term,** improvements are sustained on stable funding, and participating schools show measurable gains in reading and mathematics, broader academic performance, and attendance — especially among students with the greatest need.

Next Step

PSA is preparing its application to the U.S. Department of Education and would welcome a brief conversation with Pennsylvania's education leadership to confirm mutual interest in this partnership. With that interest confirmed, PSA would reflect Pennsylvania in its application and, if the Center is funded, work with PDE to shape the specifics, including the participating districts and the priorities the partnership would tackle first.

A letter of support or endorsement from Pennsylvania's Secretary of Education and/or Governor would strengthen the application under the competition's priority on returning education to the states. The letter would need to reach PSA ahead of the Department's **June 30, 2026** submission deadline, ideally by **June 23, 2026**, so it can be submitted with the application.

Appendix A

Illustrative Detail: Supporting a Statewide Bell-to-Bell Cell-Phone Standard

The Center brings no fixed program to any priority. The specifics below illustrate the depth of intensive support available within a single priority area; the actual scope, sequence, and tools would be developed jointly with PDE and reflected in the annual service plan. As Pennsylvania moves toward a statewide bell-to-bell cell-phone standard, the Center could help PDE, intermediate units, and districts implement it in a way that is clear, fair, research-informed, and practical for schools — supporting, in turn, the focus and engagement that strong math and literacy instruction depend on.

The Center could help PDE develop:

- **A statewide implementation framework.** Readiness steps, communication tools, phased rollout guidance, monitoring routines, and continuous-improvement cycles that districts and schools can adapt to local context.
- **Model policy and procedure templates.** Clear expectations and storage options, family communication, emergency procedures, and discipline alignment with explicit provisions for students with disabilities, multilingual learners, and students with medical or assistive-technology needs.
- **Professional learning for school and district leaders.** Practical sessions on consistent implementation, clear communication, and the questions and concerns that most often arise during rollout.
- **Family and community resources.** Plain-language materials that explain the purpose of the policy and how schools will manage student safety and family communication during the school day.
- **Student-facing resources.** Age-appropriate materials that teach expectations, support the adjustment period, and encourage positive peer interaction.
- **Data and monitoring tools.** Instruments that help PDE and local leaders review feedback alongside trends in classroom disruption, discipline, attendance, and school climate — and watch for unintended effects — so the policy can be refined over time.

Result for Pennsylvania: PDE, intermediate units, and local leaders would have shared guidance, common planning tools, and a consistent process for helping schools create learning environments where students are more engaged and educators can focus on instruction. This same depth — framework, tools, professional learning, family and student resources, and data — is available across any priority Pennsylvania sets, in proportion to the priorities named in the annual service plan.