Section I – Title Page

Proposal to Provide Services for RFP:
Nevada School Funding Consultant

RFP: 3489

Part IA – Technical Proposal	
RFP Title:	Nevada School Funding Consultant
RFP:	3489
Vendor Name:	Cross & Joftus, LLC
Address:	8610 Ridge Rd. Bethesda, MD 20817
Opening Date:	~~September 29, 2017~~ October 10, 2017
Opening Time:	2:00 PM

CROSS & JOFTUS

Section II – Table of Contents

Table of Contents

Section I – Title Page i

Section II – Table of Contents ii

Section III – Vendor Information Sheet 1

Section IV – State Documents 2

Amendment 1 Signature Page 2

ATTACHMENT A – CONFIDENTIALITY AND CERTIFICATION OF INDEMNIFICATION 4

ATTACHMENT B – VENDOR CERTIFICATIONS 5

Section V – Scope of Work 6

Task 2.1.1 – Conduct a review of the report entitled "Study of a New Method of Funding for Public Schools in Nevada" and LCB Bulletin No. 15-5 8

Task 2.1.2 – Update the report and bulletin 8

Task 2.1.3 – Review the meaning of the term "pupils who are at-risk" 12

Task 2.1.4 – Review the multiplier to the basic support guarantee per pupil for pupils with disabilities 15

Task 2.1.5 – Review the meaning of the term "gifted and talented pupils" 18

Task 2.1.6 – Recommendations for the implementation of the findings 19

Task 2.2.1 – Deliverable 1: Preliminary Report on or before August 1, 2018 20

Task 2.2.2 – Deliverable 2: Final Report on or before October 15, 2018 20

Section VI – Company Background and References 22

3.1 – Vendor Information 22

3.1.1. Vendors shall provide a company profile in the table format below. 22

2.2.1 A Nevada-based business may apply for a five percent (5%) preference on its proposal. This preference may apply if a business has its principal place of business within Nevada. This preference cannot be combined with any other preference, granted for the award of a contract using federal funds, or granted for the award of a contract procured on a multi-state basis. To claim this preference a business must submit a letter with its proposal showing that it qualifies for the preference. 23

2.2.2 Please be advised, pursuant to NRS 80.010, a corporation organized pursuant to the laws of another state shall register with the State of Nevada, Secretary of State's Office as a foreign corporation before a contract can be executed between the State of Nevada and the awarded vendor, unless specifically exempted by NRS 80.015. 23

2.2.3 The selected vendor, prior to doing business in the State of Nevada, shall be appropriately licensed by the State of Nevada, Secretary of State's Office pursuant to NRS76. Information regarding the Nevada Business License can be located at http://nvsos.gov 23

2.2.4 Has the vendor ever been engaged under contract by any State of Nevada agency? 23

2.2.5 Are you now or have you been within the last two (2) years an employee of the State of Nevada, or any of its agencies, departments, or divisions? 24

2.2.6 Disclosure of any significant prior or ongoing contract failures, contract breaches, civil or criminal litigation in which the vendor has been alleged to be liable or held liable in a matter

involving a contract with the State of Nevada or any other governmental entity. Any pending claim or litigation occurring within the past six (6) years which may adversely affect the vendor's ability to perform or fulfill its obligations if a contract is awarded as a result of this RFP shall also be disclosed. 24
2.2.7 Vendors shall review and provide if awarded a contract the insurance requirements as specified in *Attachment D, Insurance Schedule for RFP 3489.* 24
2.2.8 Company background/history and why vendor is qualified to provide the services described in this RFP. Limit response to no more than five (5) pages. 25
2.2.9 Provide a brief description of the length of time vendor has been providing services described in this RFP to the public and/or private sector. 29
2.2.10 Financial information and documentation to be included in accordance with *Section 8.5, Part III – Confidential Financial Information*. 29
SUBCONTRACTOR INFORMATION 29
2.2.11 Does this proposal include the use of subcontractors? 30
BUSINESS REFERENCES 31
2.2.12 Vendors shall provide a minimum of three (3) business references from similar projects performed for private and/or public sector clients within the last three (3) years. 31
2.2.13 Vendors shall submit *Attachment E, Reference Questionnaire* to their business references. 32
2.2.14 It is the vendor's responsibility to ensure that completed forms are received by the Purchasing Division on or before the deadline as specified in *Section 7, RFP Timeline* for inclusion in the evaluation process. Reference Questionnaires not received, or not complete, may adversely affect the vendor's score in the evaluation process. 32
2.2.15 The State reserves the right to contact and verify any and all references listed regarding the quality and degree of satisfaction for such performance. 32

Section VII – Attachment F – Proposed Staff Resume(s) 33
VENDOR STAFF RESUMES – Proposal Format 38

Section VIII – Other Informational Materials 47
Subject Matter Expert Bios 47
Letters of Reference 50
Project Team Full Resumes 55

Section III – Vendor Information Sheet

VENDOR INFORMATION SHEET FOR RFP 3489

Vendor Shall:

A) Provide all requested information in the space provided next to each numbered question. The information provided in Sections V1 through V6 shall be used for development of the contract;

B) Type or print responses; and

C) Include this Vendor Information Sheet in Section III of the Technical Proposal.

V1	Company Name	***Cross & Joftus, LLC***

V2	Street Address	***8610 Ridge Road***

V3	City, State, ZIP	***Bethesda, MD 20817***

V4	Telephone Number		
	Area Code: ***925***	Number: ***314-1863***	Extension:

V5	Facsimile Number		
	Area Code:	Number:	Extension:

V6	Toll Free Number		
	Area Code:	Number:	Extension:

V7	***Contact Person for Questions / Contract Negotiations, including address if different than above***
	Name: ***Christopher Cross***
	Title: ***Chairman***
	Address: ***109 Sunhaven Road, Danville, CA 94506***
	Email Address: ***chris@edstrategies.net***

V8	Telephone Number for Contact Person		
	Area Code: ***925***	Number: ***314-1863***	Extension:

V9	Facsimile Number for Contact Person		
	Area Code:	Number:	Extension:

V10	***Name of Individual Authorized to Bind the Organization***	
	Name: ***Christopher Cross***	Title: ***Chairman***

V11	Signature ***(Individual shall be legally authorized to bind the vendor per NRS 333.337)***	
	Signature:	Date: ***9/26/17***

Section IV – State Documents

Amendment 1 Signature Page

4. Section 2.1: The "Scope of Work" outlined in Request for Proposal: 3489 references both a report entitled "Study of a New Method of Funding for Public Schools in Nevada" and Legislative Counsel Bureau (LCB) Bulletin No. 15-5, "Interim Study Report of the Task Force on K-12 Public Education Funding." Does the Legislative Committee on Education expect the consultant to provide a comprehensive "costing-out" study of the calculations determined in those reports? Should the deliverable related to task 2.1.1 be similar to the review of the "Study of a New Method of Funding for Public Schools in Nevada" that appears in LCB Bulletin 15-5? Is the deliverable for task 2.1.2 to recalculate all the figures in the report and bulletin? Or, is the deliverable to consider the information provided therein with perspective focusing on the determination and implementation of the costs associated with different student populations?

   Does the Legislative Committee on Education expect the consultant to provide a comprehensive "costing-out" study of the calculations determined in those reports?

   A traditional "costing-out" study is beyond the funded scope of this RFP. That said, Nevada implemented a number of programs funding specific services for English language learners and schools serving high concentrations of poverty (Zoom and Victory, respectively). Therefore, there exists data and information regarding the cost and efficacy of services which should be included in any comprehensive review of Nevada school funding.

   Should the deliverable related to task 2.1.1 be similar to the review of the "Study of a New Method of Funding for Public Schools in Nevada" that appears in LCB Bulletin 15-5?

   The preliminary report required on or before August 1, 2018 may be similar to LCB Bulletin 15-5 or other format deemed appropriate by the contractor.

   Is the deliverable for task 2.1.2 to recalculate all the figures in the report and bulletin? Or, is the deliverable to consider the information provided therein with perspective focusing on the determination and implementation of the costs associated with different student populations?

   Nevada has been working to modernize the funding formula through the implementation of student "weights". The successful contractor will review the work from 2012 to the present and be required to bring recommendations informed by the progress made since the publication of LCB Bulletin 15-5 and the national literature.

5. The opening date of this proposal (deadline) has been extended to October 10, 2017 @ 2:00 PM.

ALL ELSE REMAINS THE SAME FOR RFP 3489.

Vendor must sign and return this amendment with proposal submitted.

Vendor Name: ***Cross & Joftus, LLC***

Authorized Signature: Kristyle T. Cross

Title: ***Chairman*** Date: ***10/9/17***

This document must be submitted in the "State Documents" section of vendors' technical proposal.

ATTACHMENT A – CONFIDENTIALITY AND CERTIFICATION OF INDEMNIFICATION

Submitted proposals, which are marked "confidential" in their entirety, or those in which a significant portion of the submitted proposal is marked "confidential" **shall not** be accepted by the State of Nevada. Pursuant to NRS 333.333, only specific parts of the proposal may be labeled a "trade secret" as defined in NRS 600A.030(5). All proposals are confidential until the contract is awarded; at which time, both successful and unsuccessful vendors' technical and cost proposals become public information.

In accordance with the submittal instructions of this RFP, vendors are requested to submit confidential information in separate files marked "**Part IB Confidential Technical**" and "**Part III Confidential Financial**".

The State shall not be responsible for any information contained within the proposal. If vendors do not comply with the labeling and packing requirements, proposals shall be released as submitted. In the event a governing board acts as the final authority, there may be public discussion regarding the submitted proposals that shall be in an open meeting format, the proposals shall remain confidential.

By signing below, I understand it is my responsibility as the vendor to act in protection of the labeled information and agree to defend and indemnify the State of Nevada for honoring such designation. I duly realize failure to so act shall constitute a complete waiver and all submitted information shall become public information; additionally, failure to label any information that is released by the State shall constitute a complete waiver of any and all claims for damages caused by the release of the information.

This proposal contains Confidential Information, Trade Secrets and/or Proprietary information.

Please initial the appropriate response in the boxes below and provide the justification for confidential status.

Part IB – Confidential Technical Information			
YES		NO	***X***
Justification for Confidential Status			

Part III – Confidential Financial Information			
YES		NO	***X***
Justification for Confidential Status			

Cross & Joftus, LLC
Company Name

Signature

Christopher Cross — ***10/9/17***
Print Name — Date

ATTACHMENT B – VENDOR CERTIFICATIONS

Vendor agrees and shall comply with the following:

(1) Any and all prices that may be charged under the terms of the contract do not and shall not violate any existing federal, State or municipal laws or regulations concerning discrimination and/or price fixing. The vendor agrees to indemnify, exonerate and hold the State harmless from liability for any such violation now and throughout the term of the contract.

(2) All proposed capabilities can be demonstrated by the vendor

(3) The price(s) and amount of this proposal have been arrived at independently and without consultation, communication, agreement or disclosure with or to any other contractor, vendor or potential vendor.

(4) All proposal terms, including prices, shall remain in effect for a minimum of 180 days after the proposal due date. In the case of the awarded vendor, all proposal terms, including prices, shall remain in effect throughout the contract negotiation process.

(5) No attempt has been made at any time to induce any firm or person to refrain from proposing or to submit a proposal higher than this proposal, or to submit any intentionally high or noncompetitive proposal. All proposals shall be made in good faith and without collusion.

(6) All conditions and provisions of this RFP are deemed to be accepted by the vendor and incorporated by reference in the proposal, except such conditions and provisions that the vendor expressly excludes in the proposal. Any exclusion shall be in writing and included in the proposal at the time of submission.

(7) Each vendor shall disclose any existing or potential conflict of interest relative to the performance of the contractual services resulting from this RFP. Any such relationship that might be perceived or represented as a conflict shall be disclosed. By submitting a proposal in response to this RFP, vendors affirm that they have not given, nor intend to give at any time hereafter, any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant or any employee or representative of same, in connection with this procurement. Any attempt to intentionally or unintentionally conceal or obfuscate a conflict of interest shall automatically result in the disqualification of a vendor's proposal. An award shall not be made where a conflict of interest exists. The State shall determine whether a conflict of interest exists and whether it may reflect negatively on the State's selection of a vendor. The State reserves the right to disqualify any vendor on the grounds of actual or apparent conflict of interest.

(8) All employees assigned to the project are authorized to work in this country.

(9) The company has a written equal opportunity policy that does not discriminate in employment practices with regard to race, color, national origin, physical condition, creed, religion, age, sex, marital status, sexual orientation, developmental disability or handicap.

(10) The company has a written policy regarding compliance for maintaining a drug-free workplace.

(11) Vendor understands and acknowledges that the representations within their proposal are material and important, and shall be relied on by the State in evaluation of the proposal. Any vendor misrepresentations shall be treated as fraudulent concealment from the State of the true facts relating to the proposal.

(12) Vendor shall certify that any and all subcontractors comply with Sections 7, 8, 9, and 10, above.

(13) The proposal shall be signed by the individual(s) legally authorized to bind the vendor per NRS 333.337.

Cross & Joftus, LLC

Vendor Company Name

Vendor Signature

Christopher Cross | ***10/9/17***

Print Name | Date

Section V – Scope of Work

Cross & Joftus offers the State of Nevada the policy and practitioner expertise and experience necessary to conduct an in-depth analysis of the state's existing education program and provide recommended changes or adjustments to the Nevada Plan. Our team further offers the State of Nevada the facilitation expertise to engage Nevada's educational stakeholders, including legislative committees, school districts administrators, school leaders and teachers, and communities, parents, and students. Finally, our team brings practice-based data analysis and research experience and expertise to help address complex questions of cost determinations for English learners, pupils who are "at-risk," pupils with disabilities, and students identified as gifted and talented. These definitions and factors will assist the Nevada Legislature and Nevada Department of Education in updating their knowledge of the Nevada's relation to the rest of the nation. Also, Cross & Joftus offers support of continued design, development, and implementation of an effective and efficient school funding system.

Our approach relies on collection and use of three sources of evidence that can be used to understand and review Nevada's current system and inform the Nevada Legislature and Department of Education of issues it may wish to consider for future changes to the system.

Data and analyses. Data and analyses of available data in the State of Nevada, particularly given recent changes in the distribution of financial resources to school districts, resource deployment on the part of Nevada's school districts, enrollment by identified student characteristics, and student achievement and outcomes. Our team will also collect and analyze available data on regional and non-regional comparison states and districts who are working through similar identification and funding issues.

Data and analyses can help to identify "bright spots" or "positive deviants" in the system where schools and/or districts are achieving greater-than-expected results. There is often unrecognized, but extremely valuable information that resides in these experiences.

Research and evaluation. Access and synthesis of available educational and economic research conducted on the State of Nevada and Nevada's school districts, and from states and school districts across the nation with a focus on three questions: What works? For whom does it work? And, under what conditions does it work? We bring contextual understanding of available research such that the information is relevant and appropriate to Nevada's educational and economic conditions.

We have greater confidence in the information gathered through research and evaluation when we look to the larger body of studies on a particular program or intervention rather than a single study. John Hattie, for instance, has calculated the average effect size of more than 195 educational influences based on nearly 1,200 meta-analyses.[1] The importance of having information drawn from meta-analyses is that estimated effects are based on several studies rather than one study that might have found a positive effect. Hattie's listing of average effect sizes provides us with data to help determine the relative cost-effectiveness of different strategies. In looking at costs and effectiveness indicators across programs, we can better understand of the efficiency of different resource-use strategies.

[1] https://visible-learning.org/hattie-ranking-influences-effect-sizes-learning-achievement/

In addition to drawing information from meta-analyses, we will gather information from research and evaluation studies reviewed by the What Works Clearinghouse at the Institute of Education Statistics, the research arm of the U.S. Department of Education. Studies included in the What Works Clearinghouse have satisfied "gold-standard" requirements for the use of the most rigorous research and evaluation methods, typically the use of randomized control trials. We will also gather information from rigorous research and evaluation studies commissioned by the National Center for Education Research and the National Center for Special Education Research.

We will gather information from high-quality systematic reviews of research and evaluation. Similar to meta-analyses, systematic reviews look to summarize what is known from a larger body of research and evaluation studies conducted on a particular program or intervention. Different from a meta-analysis that generally includes all of the studies associated with a program or intervention, a systematic review typically only includes those research and evaluation studies that satisfy a minimum level of rigorous research design.[2]

<u>Policy and practice experiences and perspectives</u>. Often overlooked, there is a great deal of expertise and knowledge that exists within practitioners and policymakers who are on the front lines of education and education policy. Garnering this knowledge includes working with the educational professional organizations in the state that can serve as aggregators of professional experiences and knowledge that exists across the state. At every opportunity, we will consult with practitioners from across Nevada to inform our understanding of current and desired practice.

In presenting the evidence to the State of Nevada, we believe one of our greatest strengths is in our ability to provide funding implications to the State of Nevada and to every school district through the use of funding simulations based on proposed changes in demographic identification and/or programmatic shifts. Our team has deep experience creating these funding simulations in states across the nation and internationally. We recognize that understanding the evidence and the implications of different decisions will be of great value to the Nevada's educational stakeholders.

Our team has worked with policymakers and decision-makers on issues of student identification, programmatic policy and school finance and funding at international, national, state, and local levels. An additional strength is our flexibility and nimbleness to respond quickly to Nevada and stakeholder requests given our experiences and expertise across the wide array of educational issues. Our work with legislative committees and other state agencies enables us to facilitate conversations around complex topics, including those that can be as opaque as school finance and funding, and the underlying educational concepts that guide such work. Our understanding of these concepts and issues allows us to interact with a wide variety of audiences, including policymakers and practitioners who have a range of experiences around these topics.

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[2] For instance, here is a systematic review of the relationships between principal characteristics and student achievement: https://ies.ed.gov/ncee/edlabs/regions/southeast/pdf/REL_2016091.pdf and another on the effects of increased learning time on student academic and nonacademic outcomes: https://ies.ed.gov/ncee/edlabs/regions/appalachia/pdf/REL_2014015.pdf

Finally, we have worked in Nevada on a wide range of educational issues providing assistance to Nevada policymakers, practitioners, and other community stakeholders. This depth of experience with a strong contextual understanding of the Nevada educational landscape means bringing the right information to the right questions at the right time in ways that are immediately usable.

Task 2.1.1 – Conduct a review of the report entitled "Study of a New Method of Funding for Public Schools in Nevada" and LCB Bulletin No. 15-5

Conduct a review of the report entitled "Study of a New Method of Funding for Public Schools in Nevada," published by the American Institutes for Research on September 22, 2012, Attachment I and LCB Bulletin No. 15-5, "Interim Study Report of the Task Force on K-12 Public Education Funding", Attachment H.

As consultants who work in the field of school finance and who have worked in Nevada on educational policy issues, we reviewed these at the time of release. In preparation for this proposal, we again reviewed the reports.

Upon contract execution, our entire team will review both reports along with all legislative and administrative developments over the last several biennia related to school funding and educational policy. In addition to the Cross & Joftus team of note, we will utilize the expertise of two external reviewers and one internal reviewer with specific expertise in school finance and resource allocation and use. These reviewers will offer their initial recommendations for our review of student identification, program content, and reform implementation. We believe that this level of scholarly review can only strengthen our final recommendations and give confidence to the State of Nevada that they receive the most reliable and current information available.

Task 2.1.2 – Update the report and bulletin

Update the report and bulletin identified in paragraph (1) with more current information, focusing on the determination and implementation of the appropriate funding adjustments for the additional costs associated with serving low-income pupils and English learners, as defined in 20 U.S.C. § 7801(20).

The Task Force on K-12 Public Education Funding (authorized through Senate Bill 500 from the 2013 Session) adopted 1 recommendation related to Nevada's K-12 base funding formula, 12 recommendations pertaining to students identified as English Language Learners (ELL) and at risk of low academic achievement (At-Risk), and 4 recommendations pertaining to students with disabilities.

The recommendations pertaining to students identified as English learners and at-risk, included:

1. ***Concerning the identification of ELL students, utilize data currently collected by school districts, charter schools and the NDE on the number of ELL students within a particular school district or charter school.***
2. ***Use free and reduced-price lunch (FRL) data to identify At-Risk students or when FRL data is not available for a school or a charter school, an alternative measure approved by the NDE may be used.***

3. ***For students identified as ELL and/or At-Risk, implement a weighted student funding model that would apply a weight of not less than 1.50 until such time as a cost study may be conducted. For purposes of calculating the base amount upon which the ELL or At-Risk weight would be applied, include all state and local funding within the funding formula per-pupil calculation, but exclude all federal and categorical funding from the calculation.***

4. ***Regarding students who qualify for multiple weight categories (excluding students with disabilities), apply the highest single weight to a student who qualifies as both ELL and At-Risk, based upon an unduplicated count of students.***

5. ***For purposes of determining the funding adjustments for ELL and At-Risk student populations, utilize the immediate prior year count for those student populations.***

   Additionally, the fiscal year immediately preceding the implementation of the funding adjustment for ELL and At-Risk students (FY 2017) should be used as the base-year funding for each school district and charter school.

6. ***Do not provide an ELL funding adjustment based on the density of ELL students within a school district, given that sufficient data is not currently available to determine what a density factor or a threshold should be for Nevada school districts and charter schools, but rather continue to gather data necessary to develop a potential density adjustment.***

7. ***Do not limit ELL funding to a set number of years, but rather recommend that the NDE further review how to address long-term ELL students, particularly in cases where a school district or charter school's program for ELL students is not effective.***

8. ***Provide weighted funding for ELL and At-Risk students initially as a categorical grant program outside the state's K-12 funding formula with a transition to inside the funding formula at a date to be determined in the future. The NDE should develop a plan to transition such funding to inside the state's funding formula for review and consideration by the Nevada Legislature prior to implementation.***

9. ***The NDE should develop performance benchmarks and reporting requirements tied to the ELL and At-Risk funding. Additionally, school districts and charter schools eligible to receive ELL and/or At-Risk funding should be required to submit a plan, for review and approval by the NDE, that outlines how the funding would be utilized to increase the academic performance of those student populations.***

10. ***With regard to an implementation plan for modifications to the state's K-12 funding model for ELL and At-Risk students, for the 2015-17 biennium, school districts and charter schools should be held harmless by only distributing new funding (enhanced state funding) approved by the Nevada Legislature and the Governor for ELL and/or At-Risk students.***

11. ***Beginning in FY 2018, phase-in the total calculated funding for ELL and At-Risk students, inclusive of all new funding for enrollment growth and/or funding for the two percent increase for movement on the salary scale for licensed personnel, over a four-***

year period in the following increments: FY 2018 - 10 percent; FY 2019 - 30 percent; FY 2020 - 60 percent; and FY 2021 - 100 percent.

12. ***Categorical funding directed to students identified as ELL and At-Risk should be excluded from collective bargaining. Eligible uses of such funding should include but not be limited to:***

    a. ***Classroom teachers to reduce class sizes or for ELL instruction;***
    b. ***Before and/or afterschool academic programs, including transportation to and from programs;***
    c. ***Pre-kindergarten programs;***
    d. ***Tutors, teachers' aides, counselors, social workers, nurses, and curriculum specialists;***
    e. ***Parent education and/or parental engagement;***
    f. ***Summer or intersession programs, including transportation to and from programs;***
    g. ***Early intervention programs;***
    h. ***Materials, supplies, and equipment, including technology used in approved programs or for approved purposes;***
    i. ***Funding a longer school day;***
    j. ***Funding a longer school year;***
    k. ***Remediation programs and/or partnering with higher education institutions.***
    l. ***Assessment activities;***
    m. ***Community liaison staff with language and cultural skills appropriate to the ELL population; and***
    n. ***Professional development activities.***

Our goal for Task 2.1.1 is to provide the Nevada Legislature and Department of Education with the most current evidence (data, research, and practitioner expertise) associated with model components that have a rational basis substantiated by high-quality, transparent information. Additionally, our team will update to current, to the extent possible, the data exhibited in charts and graphs throughout the report.

We propose using multiple methodologies to collect, analyze, and synthesize information and knowledge concerning issues related to the identification of students for purposes of funding and the determination and implementation of the appropriate funding adjustment for the additional costs associated with serving low-income pupils and English learners in Nevada. Cross & Joftus will create a rational basis for such adjustments based on:

- ***Data and analyses. We will analyze available Nevada and other state data for the most recent year available. To the extent that these data exist, we will explore those data in regional states and how they compare to Nevada and its school districts.***

  Our data and analysis approach is often referred to as the successful schools or school districts methodology. One important thing to keep in mind is that the successful schools/districts approach does not represent costs. Instead, this approach provides information about levels of spending and may provide some information of the cost boundaries. Data sources and comparison groups may include:

- ***Districts within the Western States Region and elsewhere in the nation that are meeting or surpassing comparable education programs to Nevada. Data from the Stanford Center for Education Policy Analysis is the first-of-its-kind in bringing together school district-level outcomes, demographic, and expenditures data that can be used for comparative analyses.[3]***
- ***Similar- and higher-performing districts and states based on the performance of English learner students on WIDA assessments (Nevada is a member of the WIDA consortium).***
- ***Similar and higher-performing states based on National Assessment of Educational Progress (NAEP), such as Massachusetts, New Hampshire, and Minnesota, whose students consistently perform at high levels.***
- ***Countries that perform well on international assessments such as PISA and TIMSS and expenditures data available from the OECD and the National Center on Education and the Economy country profiles.[4]***

- ***Research and evaluation. The Cross & Joftus-led team believes that there is a great deal of information that can be gathered through what is known from rigorous research and evaluation of programs, interventions, and resource allocation strategies. Cross & Joftus will review the research literature related to the costs of education by those factors identified by the Committee. Cross & Joftus believes that there is a great deal of information that can be gathered through what is known from rigorous research and evaluation of programs, interventions, and resource allocation strategies.***

  Additionally, Cross & Joftus will collect the available adequacy studies to synthesize estimates for dollars and/or weights used for students in poverty, English language learners, and other students with special needs. Baker and Taylor first attempted to synthesize findings across adequacy studies up to 2006.[5] The State of Maryland commissioned a review of adequacy studies that included adequacy studies up to 2014.[6] The latter report did not attempt to calculate relative weights for subgroups of students where the adequacy models, such as the evidence-based model, only reported staffing ratios. Cross & Joftus will take the additional step to synthesize across these studies to provide the Committee with easily identifiable and understandable information from these studies.

- ***Policy and practice experiences and perspectives. Cross & Joftus will conduct focus groups, interviews, and professional judgment panels of Nevada school district leaders, program administrators, teachers, and specialists to gather their thoughts and insights based on their expertise and experiences. We will also interview program administrators in the Nevada Department of Education. This professional judgment***

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[5] Baker, B. and Taylor, L. "Measuring Educational Adequacy in Public Schools." Last accessed from: http://bush.tamu.edu/research/faculty/TXSchoolFinance/papers/MeasuringEducationalAdequacy.pdf

[6] Aportela, A., Picus, L., Odden, A., & Fermanich, M. (2014). "A Comprehensive Review of State Adequacy Studies Since 2003." Prepared for Maryland State Department of Education. Last accessed from: http://marylandpublicschools.org/Documents/adequacystudy/AdequacyReviewReport_rev_091214.pdf

method recognizes and values the expertise and knowledge of those working in classrooms, schools, and districts. We may also seek the thoughts and insights of educators through online platforms for those educators whom we are unable to include in our in-person professional judgment panels.[7] This proximity of service delivery provides unique perspectives to the challenges and opportunities and local knowledge that can prove powerful in creating local solutions. And, we will interview program administrators in the Nevada Department of Education who help to support Nevada's school districts and charter schools.

In addition to gathering information from Nevada policymakers and practitioners, Cross & Joftus will review the practices used in other state funding formulas related to English learners and students in poverty. Finally, Cross & Joftus will consult state and national professional organizations that might have programming standards that can be used to develop per-pupil funding amounts for inclusion in a state funding formula.

The Cross & Joftus team includes several former teachers, pupil support practitioners, and school-, district-, and state-level program administrators, as well as members of district and state boards of education. We believe that having these subject matter experts who come with the expertise and experience working in schools is essential to our team's ability to understand the issues related to adequate and equitable funding and to provide the Select Committee and the Legislature with information that is relevant and based in practice. To be sure, this is not just an academic exercise.

There is no single-best methodology or source of information to derive what are the adequate and equitable funding levels for students identified as English learners, students in poverty, or those in need of special education or gifted and talented services. We will work with the Department of Education and designated staff from the Legislature throughout the project to ensure that the information provided to them is clear and understandable as well as actionable on the part of the Legislature.

Task 2.1.3 – Review the meaning of the term "pupils who are at-risk"

Review the meaning of the term "pupils who are at-risk," as defined in NRS 387.121, to establish an appropriate definition of the term and recommend appropriate funding adjustments for the additional costs associated with serving such pupils.

NRS 387.121.2 states, "It is the intent of the Legislature, commencing with Fiscal Year 2016-2017, to provide additional resources to the Nevada Plan expressed as a multiplier of the basic support guarantee to meet the unique needs of certain categories of pupils, including, without limitation, pupils with disabilities, pupils who are limited English proficient, pupils who are at risk and gifted and talented pupils. As used in this subsection, "pupils who are at risk" means pupils who are eligible for free or reduced-price lunch pursuant to 42 U.S.C. §§ 1751 et seq., or an alternative measure prescribed by the State Board of Education."

The Nevada Legislature and Department of Education have worked hard to find ways to support at-risk students. Nevada has invested in different types of programs for schools with high proportions of students who are English learners and students in poverty, such as the

[7] For example, California conducted a professional judgment study through online simulations: http://www.ppic.org/content/pubs/op/OP_307JSOP.pdf

Zoom Schools and Rural Grants Program, $50 million per year in the 2015-2017 biennium, and the Victory Schools Programs, $25 million per year in the 2015-2017 biennium. These programs have resulted in effective weights of approximately 0.20 for both English learners and students in poverty.

Additionally, the Nevada Legislature approved $22.3 million for the Read by Grade 3 Program in fiscal year 2016-17 to improve reading outcomes by grade 3 of those students who are not served by either the Zoom Schools and Rural Grants or Victory Schools programs.

And, the Nevada Legislature approved $2.5 million per year in each year of the 2015-2017 biennium to assist in turning around persistently underperforming schools.

Addressing some of the larger complexity related to the interactions between governance, funding, operations and activities of schools and school districts, and other systemic factors, the 2015 Nevada Legislature enacted Assembly Bill 394 that seeks to understand and inform the development of a plan to reorganize the Clark County School District into local school precincts based on what was learned from the Empowerment Schools pilot program.

For students who are at-risk, Cross & Joftus will conduct a comprehensive review of:

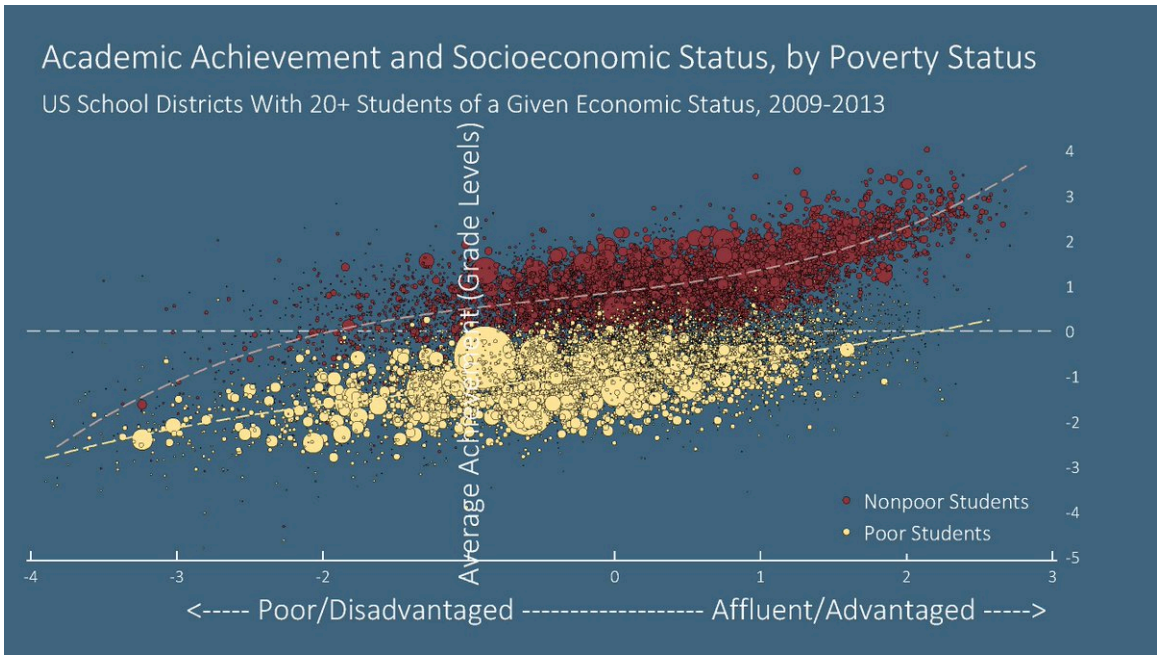
- ***Data and analyses. We will collect analyze data related to identification of Nevada students who are at-risk and the resources deployed to serve these students, including programmatic efforts such as Response to Intervention or other types of multi-tiers systems of support and the operating definitions used by schools and districts to identify students for more-intensive educational programming.***

  We will conduct a successful schools/districts analysis as a way of identifying "bright spots" across Nevada's education systems that might help to inform resource needs and strategies related to at-risk students. One area of exploration, using Nevada data, might be to understand the variation in student outcomes and resource use for similarly situated students and similarly situated schools. If the goals of a school funding formula are the efficient and effective allocation of resources for purposes of providing a quality education for all students, we believe it important to understand possible sources of any variations.

  States tend to use federal free or reduced-price lunch program eligibility as a proxy for the number of at-risk students in a school and school district. However, just because a student is eligible for the program does not mean that they are at-risk and, at the same time, a student who is at-risk of academic failure is not necessarily eligible for the program.

  However, we do understand that learning challenges are often associated with students living in poverty and additional resources may be necessary to overcome those challenges in the interest of equity. Sean Reardon and colleagues have analyzed the relationships between academic achievement and socioeconomic status using school district data from across the nation, including Nevada (see Figure 1).

Figure 1. Academic achievement and socioeconomic status, by poverty status



Note: Presented at the Society for Research on Educational Effectiveness annual conference, 2017

Cross & Joftus will use data from the Nevada Department of Education and those Nevada data used by Reardon to understand the relationships between different types of students, including those measures traditionally used to identify at-risk students, including eligibility for the federal free- or reduced-priced lunch program.

In addition, we will explore more direct measures of poverty, such as those available from the U.S. Census Bureau. For example, in a comparison of Census measures of poverty and free- or reduced-lunch eligibility in New Jersey schools, Baker found a strong relationship between these two measures.[8] However, Census-level data tend to be aggregated to larger community levels. Through this aggregation, details about concentrations of poverty at individual school levels may be lost, and an exploration of this correlation may be valuable in Nevada.

- ***Research and evaluation. We will review the literature related to the definitions and identification of at-risk students, as well as the effectiveness and efficiency of different programs and interventions, including from the federal What Works Clearinghouse at the Institute of Education Sciences.***

  An example of research that might help to expand understanding of how "at-risk" might be defined includes research from Katherine Michelmore and Susan Dynarski that describes the effects of "persistent" disadvantage on students in Michigan.[9] Those grade 8 students who have always been eligible for the federal free- or reduced-price lunch program achieved at significantly lower levels than those grade 8 students who

[8] Downloaded from: http://njedpolicy.files.wordpress.com/2013/07/slide1.jpg.
[9] Michelmore, K. & Dynarski, S. (2015). "The Persistence of Poverty: Using Longitudinal Data to Understand Gaps in Educational Outcomes." Last accessed from: http://popcenter.uchicago.edu/events/Dynarski_DW%20Paper.pdf

have only intermittently been eligible for the program. We will consult the available research literature on the many metrics used to identify at-risk students beyond the use of the federal free- or reduced-price lunch program eligibility.

In addition, we will review the larger body of adequacy studies conducted to understand definitional and funding recommendations made in other states. This leverages work done in other states who are working through the same issues, and we will work to determine the appropriateness of the information gathered given the different and similar contexts across states; and

- ***Policy and practice experiences and perspectives. We will engage Nevada stakeholders through focus groups, interviews with education leaders and various special interest group leaders, and professional judgment panels, including professional judgment panels with school district program administrators, teachers, and specialists. We believe having the perspectives of those who work more closely to serve these students is critical when considering the full range of information and evidence.***

  In addition, we will interview program administrators in the Nevada Department of Education; consult practice guides from the Institute of Education Sciences; and the policy and practice experiences from other states as it relates to the adequate, equitable, effective, and efficient funding for at-risk students. And, we will review the policies and funding mechanisms associated with at-risk students in other states and bring relevant information forward as part of our larger synthesis of information and evidence. Finally, Cross & Joftus will consult state and national professional organizations that might have programming standards that can be used to develop per-pupil funding amounts for inclusion in a state funding formula.

Cross & Joftus will present evidence to the Legislature and Department of Education related to the appropriate, accurate method for identifying at-risk students (those students who are in greater need of services and supports to give them opportunities to achieve academic and social levels similar to their peers).

Based on the evidence presented and our recommendations, we will create funding simulations to explore the funding implications to the state and to each school district in the state.

Task 2.1.4 – Review the multiplier to the basic support guarantee per pupil for pupils with disabilities

Review the multiplier to the basic support guarantee per pupil for pupils with disabilities pursuant to NRS 387.122.

Cross & Joftus recognizes significant changes to the funding support for pupils with disabilities, most significantly in the most recent biennium. NRS 387.122.3 (effective July 1, 2016) states, "The basic support guarantee per pupil must include a multiplier for pupils with disabilities. Except as otherwise provided in this subsection, the funding provided to each school district and charter school through the multiplier for pupils with disabilities is limited to the actual number of pupils with disabilities enrolled in the school district or charter school, not to exceed 13 percent of total pupil enrollment for the school district or charter school. If a

school district or charter school has reported an enrollment of pupils with disabilities equal to more than 13 percent of total pupil enrollment, the school district or charter school must receive an amount of money necessary to satisfy the requirements for maintenance of effort under federal law."

The Task Force on K-12 Public Education Funding had four recommendations:

1) ***Replace the current unit-funding methodology for students with disabilities with a weighted student-funding model that would apply a 2.0 weight to all students with disabilities, with a funding cap of 13 percent of the overall enrollment of a school district or charter school's students with disabilities, based upon a current year count.***

2) ***Provide weighted funding for students with disabilities initially as a categorical grant program outside the state's K-12 funding formula with a transition to inside the funding formula at a date to be determined in the future.***

3) ***Create a contingency fund for exceptionally high-cost students with disabilities and recommend the NDE develop a plan for the operational guidelines of the fund for presentation to the 2015 Legislature. The NDE should also review the possibility of transferring the existing Nevada Revised Statutes Chapter 395 program into the new contingency fund program.***

4) ***The NDE, in conjunction with experts from local school districts and charter schools, should develop the details of an implementation plan for modifications to the state's K-12 funding model for students with disabilities for submission to the 2015 Legislature, which includes a hold harmless provision and takes into account, at both the state and local levels, the federal maintenance of effort requirements.***

According to the 2017 Edition of the Nevada Education Data Book, "The 2015 Nevada Legislature enacted Senate Bill 508, which expressed the intent of the Legislature to provide additional resources to the Nevada Plan for certain categories of pupils with unique needs, including pupils with disabilities, pupils who are limited English proficient, pupils who are at risk, and gifted and talented pupils."[10] And, more changes continue to be contemplated. In a summary of Governor Sandoval's recommended budget for the 2017-19 biennium, "Maintains the existing funding in support of students with disabilities and appropriates an additional $30 million in funding for a total of $183 million in FY 2018 and $199 million in FY 2019 as a continued, responsible investment until the desired weight is achieved, as recommended by the Task Force Interim Study of 2013. Special education funding was converted to a weight in the 2017 fiscal year and the additional resources will continue to be expressed as a multiplier and allocated to each district on a per-pupil basis (NRS 387.121)."[11]

From the Nevada Education Data Book, "In order to begin transitioning to a weighted student formula for students with disabilities, the 2015 Legislature approved an increase in State funding of $25 million in FY 2016–2017. This funding is estimated to provide a statewide

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[10] Retrieved from: https://www.leg.state.nv.us/Division/Research/Publications/EdDataBook/2017/2017EDB.pdf
[11] Retrieved from: http://www.doe.nv.gov/uploadedFiles/nde.doe.nv.gov/content/News__Media/Press_Releases/2017docs/EducationOverview2017_SCFinal.pdf

weight of approximately 0.50." With additional detail, the Nevada Superintendent stated, "There was a FY17 increase of $30 million. For 2016–17 school year, there are a total of 54,114 special education students enrolled in public schools. The average per pupil is $3,034 (ranging from $2,968– $9,090), which can be expressed as multiplier of 0.53 of the basic state guarantee."[12]

In addition to the weighted funding and in addressing recommendation #3, the 2015 Legislature approved $5 million to support the Contingency Account for Special Education (CASE) program in the second year of the 2015-2017 biennium. This account is to provide State funds for extraordinary expenses related to the education of students with disabilities. The funds may be used to support services that are not ordinarily present in the typical Individualized Education Plan (IEP), and the costs must exceed the total funding available to the school district or charter school for the student. The regulations for the new program were approved by the State Board of Education at its June 2016 meeting. School districts may submit an application for funds during SY 2016–2017. In order to meet federal Maintenance of Effort (MOE) mandates, the State must continue the provision of $5 million in each fiscal year going forward.

For students with disabilities, Cross & Joftus will conduct a comprehensive review of:

- ***Data and analyses. We will collect and analyze data related to identification of Nevada students with disabilities according to their specific disabilities (i.e., 13 federal categories) and their time in general education classrooms, including enrollment data from the Nevada Department of Education, and performance data from the National Longitudinal Survey, National Assessment of Educational Progress, and Office of Civil Rights, as examples.***

  We will conduct a successful schools/districts analysis as a way of identifying "bright spots" across Nevada's education systems that might help to inform resource needs and strategies related to students with disabilities;

- ***Research and evaluation. We will review the literature related to the identification of students and the effectiveness and efficiency of different programs and interventions. We will consult the federal What Works Clearinghouse and the National Center for Special Education Research at the Institute of Education Sciences, as well as high-quality meta-analyses and systematic reviews.***

  In addition, we will review the larger body of adequacy studies conducted to understand recommendations made in other states. This leverages work done in other states who are working through the same issues, and we will work to determine the appropriateness of the information gathered given the different and similar contexts across states; and

- ***Policy and practice experiences and perspectives from Nevada stakeholders through focus groups, interviews, and professional judgment panels, including with school district leaders, program administrators, teachers, and specialists. We believe having***

[12] Retrieved from: http://www.doe.nv.gov/uploadedFiles/ndedoenvgov/content/Legislative/2017/ModernizingNVPlanada1.pdf

the perspectives of those who work more closely to serve these students is critical when considering the full range of information and evidence.

In addition, we will interview program administrators in the Nevada Department of Education; consult practice guides from the Institute of Education Sciences, specifically the National Center for Special Education Research; and the policy and practice experiences from other states as it relates to the adequate, equitable, effective, and efficient funding for special education. And, we will review the special education policies and funding mechanisms associated with students with disabilities in other states and bring relevant information forward as part of our larger synthesis of information and evidence. Finally, Cross & Joftus will consult state and national professional organizations that might have programming standards that can be used to develop per-pupil funding amounts for inclusion in a state funding formula.

Cross & Joftus will present evidence to the Legislature and Department of Education related to the appropriate, accurate method for identifying students with disabilities and how to provide funding to school districts to serve these students.

Based on the evidence presented and our recommendations, we will create funding simulations to explore the funding implications to the state and to each school district in the state.

Most significantly related to special education funding, our team will review federal education requirements regarding special education funding maintenance of effort requirements for the Nevada Department of Education and local education agencies (school districts), allowable exceptions to school district maintenance of effort, and the use of state high-cost funds.[13]

Given the importance of special education and the regulatory requirements associated with special education, our team includes several individuals with experience as direct service providers and district administrators along with state and federal administrator experience, including Alexa Posney who is the former Assistant Secretary of Special Education at the U.S. Department of Education.

Task 2.1.5 – Review the meaning of the term "gifted and talented pupils"

Review the meaning of the term "gifted and talented pupils," as defined in NRS 388.5231 [*sic*], to establish an appropriate definition for the term and recommend a consistent statewide standard to identify such pupils.

Cross & Joftus will review the meaning of the term included in the Nevada Revised Statutes. NRS 388.5251 states, "'gifted and talented pupil' means a person under the age of 18 years who demonstrates such outstanding academic skills or aptitudes that the person cannot progress effectively in a regular school program and therefore needs special instruction or special services." We will collect and review information and knowledge from three sources: data analyses, research and evaluation, and practitioners and policy. Based on a synthesis of information from these three sources, we will provide a recommendation for a definition for the term for use as a consistent statewide standard to identify such pupils.

[13] Maintenance of effort: https://www.law.cornell.edu/cfr/text/34/300.203#b; Exceptions to LEA maintenance of effort: https://www.law.cornell.edu/cfr/text/34/300.204; SEA high-cost fund: https://www.law.cornell.edu/cfr/text/34/300.704#c.

For gifted and talented students, Cross & Joftus will conduct a comprehensive review of:

- ***Data and analyses. We will analyze available Nevada data to see the relationships between expenditures and student-level factors, such as those identified as gifted and talented. These types of analyses provide information that can be used to guide design and development of funding formulas. In addition, to the extent that these data exist, we will explore those data in regional states and how they compare to Nevada and its school districts.***

- ***Research and evaluation. Cross & Joftus will review the research literature related to the definitions and resource needs and costs of education associated with gifted and talented students. Cross & Joftus believes that there is a great deal of information that can be gathered through what is known from rigorous research and evaluation of programs, interventions, and resource allocation strategies.***

  Additionally, Cross & Joftus will collect the available adequacy studies to synthesize estimates for dollars and/or weights used for gifted and talented students. Cross & Joftus will take the additional step to synthesize across these studies to provide the Department of Education and Legislature with easily identifiable and understandable information from these studies.

- ***Policy and practice experiences and perspectives. We will engage Nevada stakeholders through focus groups, interviews, and professional judgment panels, including with school district program administrators, teachers, and specialists. We believe having the perspectives of those who work everyday to serve these students is critical when considering the full range of information and evidence.***

  In addition, we will interview program administrators in the Nevada Department of Education; consult practice guides from the Institute of Education Sciences; and the policy and practice experiences from other states as well as national organizations dedicated to the education of gifted and talented students as it relates to their identification and the adequate, equitable, effective, and efficient funding for gifted and talented students. Cross & Joftus will review the definitions and policies and practices used in other state funding formulas related to gifted and talented students. Finally, Cross & Joftus will consult state and national professional organizations that might have programming standards that can be used to develop per-pupil funding amounts for inclusion in a state funding formula.

Task 2.1.6 – Recommendations for the implementation of the findings

Make recommendations for the implementation of the findings of the independent consultant pursuant to Objectives (2.1.1) to (2.1.5), inclusive.

Creating balanced information

Our approach is based on understanding the strengths and weaknesses associated with existing sources of evidence and the methodologies used to generate that information. For instance, we are attuned to the strengths and weaknesses of different cost-estimation approaches. In addition to analytical evidence, our team includes practitioners and subject-matter experts in each of the areas being explored that provide understanding of practical

context. We will work to maximize the strengths of the different sources of information, and minimize the weaknesses in order to present a balanced presentation of high-quality evidence.

We believe that the information from the data and analysis and research and evaluation approaches can help practitioners in their reflections on their experiences and offer new insights to their perspectives. Similarly, the policy and practice experiences and perspectives, particularly of those in Nevada, can help bring greater context to the information generated through data and analysis and understood from research and evaluation.

We will provide estimates of costs associated with each recommendation (2.1.2 through 2.1.5). These cost estimates will be generated for each school district and for the state. And, we will provide the Legislature and Nevada Department of Education with recommendations for implementation, including options for categorical or general-fund allocation, phased-in approaches, and considerations for program accountability to ensure efficiency and effectiveness.

Our history of working in Nevada on a range of education policy issues provides us an understanding of the political and policymaking environment that can be helpful when considering the relevance, applicability, usability, and relevance which are important considerations for policy and practice implementation.

Task 2.2.1 – Deliverable 1: Preliminary Report on or before August 1, 2018

The contractor selected by the Department of Education shall complete the work identified in the Scope of Work and, on or before August 1, 2018, submit a preliminary report containing the information described in the Scope of Work to the Department of Education. Upon receipt of the preliminary report, the Department of Education shall immediately forward the preliminary report to the Legislative Committee on Education.

Cross & Joftus will provide a preliminary report to the Department of Education on or before August 1, 2018. This preliminary report will include description of the analyses, methodologies and information collected used in those analyses, and preliminary findings based on those analyses.

Prior to delivery of the preliminary findings, we will provide the Department of Education and members of the Legislative Committee on Education with milestone reports throughout the project. We pride ourselves on a "no surprises" approach to these types of projects.

Task 2.2.2 – Deliverable 2: Final Report on or before October 15, 2018

Upon receipt of the preliminary report, the Legislative Committee on Education shall review the preliminary report and provide recommendations to the contractor. After receiving such recommendations from the Legislative Committee on Education and any recommendations which may be provided by the State Board of Education and Department of Education, the contractor shall prepare a final report which includes such recommendations and, on or before October 15, 2018, submit the final report to the Governor and the Director of the Legislative Counsel Bureau for transmission to the next regular session of the Legislature.

Cross & Joftus will receive feedback and recommendations from the Legislative Committee on Education, State Board of Education, and Department of Education and make all appropriate changes for inclusion in a final report. We will deliver the final report on or before October 15, 2018 to the Governor and the Director of the Legislative Counsel Bureau.

We will make ourselves available throughout the project, including after delivery of the final report to gather insights and answer questions that may arise from all project stakeholders.

This final report will contain the reviews of two external experts and one internal expert of school finance and resource allocation of our work, allowing the State of Nevada confirmation of our findings or areas of dissent.

Section VI – Company Background and References

3.1 – Vendor Information

3.1.1. Vendors shall provide a company profile in the table format below.

Question	Response
Company name:	***Cross & Joftus, LLC***
Ownership (sole proprietor, partnership, etc.):	***Partnership***
State of incorporation:	***Maryland***
Date of incorporation:	***March 23, 2004***
# of years in business:	***13***
List of top officers:	***Christopher Cross (Chairman), Scott Joftus (President), Sharon Deich (VP), Jean-Claude Brizard (VP)***
Location of company headquarters, to include City and State:	***Bethesda, MD***
Location(s) of the office that shall provide the services described in this RFP:	***California***
Number of employees locally with the expertise to support the requirements identified in this RFP:	***0***
Number of employees nationally with the expertise to support the requirements in this RFP:	***13***
Location(s) from which employees shall be assigned for this project:	***California; Hawaii; Kentucky; Washington, DC; Wisconsin***

2.2.1 A Nevada-based business may apply for a five percent (5%) preference on its proposal. This preference may apply if a business has its principal place of business within Nevada. This preference cannot be combined with any other preference, granted for the award of a contract using federal funds, or granted for the award of a contract procured on a multi-state basis. To claim this preference a business must submit a letter with its proposal showing that it qualifies for the preference.

N/A

2.2.2 Please be advised, pursuant to NRS 80.010, a corporation organized pursuant to the laws of another state shall register with the State of Nevada, Secretary of State's Office as a foreign corporation before a contract can be executed between the State of Nevada and the awarded vendor, unless specifically exempted by NRS 80.015.

Cross & Joftus will provide our Nevada Business License Number prior to contract.

2.2.3 The selected vendor, prior to doing business in the State of Nevada, shall be appropriately licensed by the State of Nevada, Secretary of State's Office pursuant to NRS76. Information regarding the Nevada Business License can be located at http://nvsos.gov.

Question	Response
Nevada Business License Number:	***TBD***
Legal Entity Name:	***Cross & Joftus, LLC***

Is "Legal Entity Name" the same name as vendor is doing business as?

Yes	***X***	No	

If "No", provide explanation.

N/A

2.2.4 Has the vendor ever been engaged under contract by any State of Nevada agency?

Yes		No	***X***

If "Yes", complete the following table for each State agency for whom the work was performed. Table can be duplicated for each contract being identified.

N/A

Question	Response
Name of State agency:	
State agency contact name:	
Dates when services were performed:	
Type of duties performed:	
Total dollar value of the contract:	

2.2.5 Are you now or have you been within the last two (2) years an employee of the State of Nevada, or any of its agencies, departments, or divisions?

Yes		No	***X***

If "Yes", please explain when the employee is planning to render services, while on annual leave, compensatory time, or on their own time?

If you employ (a) any person who is a current employee of an agency of the State of Nevada, or (b) any person who has been an employee of an agency of the State of Nevada within the past two (2) years, and if such person shall be performing or producing the services which you shall be contracted to provide under this contract, you shall disclose the identity of each such person in your response to this RFP, and specify the services that each person shall be expected to perform.

N/A

2.2.6 Disclosure of any significant prior or ongoing contract failures, contract breaches, civil or criminal litigation in which the vendor has been alleged to be liable or held liable in a matter involving a contract with the State of Nevada or any other governmental entity. Any pending claim or litigation occurring within the past six (6) years which may adversely affect the vendor's ability to perform or fulfill its obligations if a contract is awarded as a result of this RFP shall also be disclosed.

Does any of the above apply to your company?

Yes		No	***X***

If "Yes", please provide the following information. Table can be duplicated for each issue being identified.

N/A

Question	**Response**	
Date of alleged contract failure or breach:		
Parties involved:		
Description of the contract failure, contract breach, or litigation, including the products or services involved:		
Amount in controversy:		
Resolution or current status of the dispute:		
If the matter has resulted in a court case:	Court	Case Number
Status of the litigation:		

2.2.7 Vendors shall review and provide if awarded a contract the insurance requirements as specified in *Attachment D, Insurance Schedule for RFP 3489.*

Cross & Joftus will provide proof of all required insurance upon award.

2.2.8 Company background/history and why vendor is qualified to provide the services described in this RFP. Limit response to no more than five (5) pages.

C&J is a nationally recognized authority on education policy and education systems. Christopher Cross and Scott Joftus founded the firm in 2004 and serve as Chairman and President, respectively. Across its 13 years, C&J has served clients in more than 30 states. In 2007, education finance expert Sharon Deich joined the firm as a Partner and Vice President and developed the C&J's education finance practice area.

Our team has worked with policymakers and decision-makers on issues of school finance and funding at international, national, state, and local levels. We have worked with state and local education agencies across the nation to create coherent systems dedicated to improved outcomes for students. Our clients have included nearly 50 school districts, consortia of districts, states, and local governments as well as nearly 60 philanthropic and non-profit organizations.

C&J Chairman and proposed Co-Principal Investigator Christopher Cross is a former Assistant Secretary for Educational Research and Improvement at the U.S. Department of Education and former president of the Maryland State Board of Education. Cross has worked with various facets of education policy in Nevada for over 20 years. He served as the chief advisor to the Council on Academic Standards, provided direction for the state's application under the Race to the Top competition for the Blue Ribbon Commission and has testified before the state legislature.

In his role with the Council on Academic Standards, Cross and his team from the Council for Basic Education, where he was then the CEO, facilitated and guided the development of the first set of standards in the period from 1997-1999. Cross continued in the role of chief advisor to the Council until 2004. He continued his involvement in education in NV as a consultant to Wynn Resorts and in that role supported the interests of Wynn, specifically Elaine Wynn, in her interests in that field.

Proposed Co-Principal Investigator Richard Seder is nationally and internationally recognized for work in school funding and the design and implementation of educational systems. He has led technical assistance projects assisting policymakers and practitioners on issues of adequacy and equity, human capital, monitoring and evaluation systems, and college and career readiness. Seder has performed many domestic and international cost studies and developed comprehensive school funding systems that recognize the dual requirements of equity and adequacy, including review of formula weights and overall funding levels to reflect district, school, and student needs.

In addition to the co-Principal Investigators, C&J Vice President and lead for C&J's School Finance practice Sharon Deich and C&J Senior Associate Michael Goetz bring added expertise. Deich is an expert in resource allocation and the former associate director for The Finance Project. Goetz is nationally recognized for work in school funding and resource allocation and reallocation according to educator priorities. Goetz has worked with educational stakeholders to create school, district, and state funding models across multiple contexts.

The C&J offers the State of Nevada the policy and practitioner expertise and experience necessary to conduct an in-depth analysis of the state's existing program and provide recommended changes or adjustments. Our team further offers the State of Nevada the practice-based data analysis and research experience and expertise to help address complex questions of cost determination, revenues analysis, resource allocation, and resource use to design, develop, and implement an effective and efficient school finance and funding system.

Below is a sample of recent and relevant clients.

Select Cross & Joftus Clients

Allentown School District. ***Cross & Joftus conducted a fiscal analysis for the district in partnership with Education Resource Strategies. Our firm reviewed data on expenditures to understand how spending patterns in key function areas compared with other districts; how resources are distributed across schools and students; how staffing resources are distributed across schools; how class sizes effect expenditures; and how professional development dollars are being spent. Our firm also provided recommendations that allowed the district to better direct resources toward education priorities.***

Arkansas Department of Education. ***Cross & Joftus worked with the Arkansas Department of Education and a consortium of six Arkansas districts to improve the use of data and technology in fostering whole-system improvement. Our firm conducted an evaluation of district and state implementation of and satisfaction with the statewide data system and provided recommendations to all stakeholders for improvements, including how to use data more effectively to inform the teaching and learning process.***

California Department of Education. ***Cross & Joftus worked with a state-wide task force on special education whose mission is to transform education to improve outcomes for students with disabilities. Cross & Joftus synthesized the work of the task force and its subcommittees and prepared a vision statement, a report of findings, and recommendations for policy, practice and legislative reform that will guide the future delivery of special education in the state.***

The California Department of Education also selected Cross & Joftus to provide services for districts in the state that have been identified for improvement.

Camden, NJ Board of Education. ***In partnership with UPD, we helped the Camden, NJ Board of Education craft a 5-year Strategic Plan. To arrive at such a plan, we provided:***

- ***Research on exemplar models of education***
- ***Recommendations of new programs/revisions to existing programs***
- ***Financial modeling***
- ***Recommendations regarding data use and technology***
- ***Facilities planning***

The final deliverable, the strategic plan, included district vision, mission, goals, objectives and strategies as well as recommended metrics for determining whether the strategic plan is successfully being executed as designed.

Fairfield-Suisin Unified School District. ***C&J was contracted by the district to conduct a comprehensive review of its special education system as well as general education practices that support students with disabilities.***

Fayette County Public Schools. ***C&J, working with UPD, conducted a comprehensive needs analysis for the district and provided the new superintendent with recommendations for his entry plan.***

Kansas Department of Education. ***In 2008, C&J partnered with the Kansas State Department of Education (KSDE) to rethink the state's approach to school reform and in doing so, increase capacity to raise achievement and close significant gaps in student learning. The result of this partnership was the Kansas Learning Network, an approach that includes a comprehensive needs assessment, the establishment of strategic priorities, targeted technical assistance, and collaboration with peers across the state. For four years, C&J worked with all districts and schools in Kansas that had been identified as on improvement, corrective action, or restructuring as defined by the No Child Left Behind Act. Evaluations of the Kansas Learning Network found that the model was highly valued by district and state administrators and, more importantly, had made a significant impact on student achievement in participating schools and districts.***

Nellie Mae Education Foundation. ***Cross & Joftus provided support to the Foundation's leadership team as they implement their District Level Systems Change initiative that creates opportunities to expand student centered learning approaches. This included supporting the foundation in selecting grantees and working with the foundation and grantees to develop sustainability strategies for continuing this work as grant funding sunset. We also reviewed proposals for a new cohort of grantees to assess the potential for long-term sustainability of student-centered learning and worked with grantees to promote the long-term success of this work.***

Providence Afterschool Alliance. ***Cross & Joftus provided tactical guidance on budgeting and sustainability so that PASA is in a better position to take advantage of new funding opportunities moving forward. This work was part of a larger strategic planning process to set the course of the organization for the next three years.***

Wallace Foundation. ***Cross & Joftus is supporting a three-year project to provide technical assistance on finance and sustainability to the Wallace Foundation's Next Generation After School Systems Building Initiative. The TA team for this project includes C&J, The National League of Cities, the National Institute of Out-of-School Learning, and the Gardner Center at Stanford University. We are supporting nine cities as they strengthen their afterschool infrastructure, implement quality enhancements and expand OST programming.***

Wyoming. ***For the Wyoming legislature, Cross & Joftus conducted a study of state-level educational governance in the state. The study focused on the relationship between the allocation of responsibilities and accountabilities and engaged stakeholders across the state in discussions of organizational structures that will support strong leadership, clear guidance, and effective, timely support to schools and districts. As educators work to meet their objective of educating all children to high standards, the Legislature is seeking to ensure that the governance structure supports their efforts and creates a strong foundation for the future of the state.***

Additional Associate Experience

Seder, R. (current). Needs assessments, systems mapping, and improvement strategies. Hokupaa (Hawaii) Collective Impact Initiative.

Seder, R. (2017, April). Adequacy and equity in the Weighted Student Formula. Hawaii Department of Education, Committee on Weights.

Seder, R. (2016). Served as an expert witness in the CCJEF v. Rell school finance case in Connecticut.

Seder, R. (2016). Comprehensive needs assessment for systems improvement: A look at Hawaii, American Samoa, the Commonwealth of the Northern Mariana Islands, Guam, Federated States of Micronesia, Republic of the Marshall Islands, and Republic of Palau.

Seder, R. (2015). Reorganization of the Hawaii Department of Education to a service agency: Office of Program Administration and Compliance. Hawaii Department of Education.

Seder, R. (2015). Evaluation of school technology financing in San Diego Unified School District: Propositions S & Z. Center for Education Policy & Law, University of San Diego.

Seder, R. (2014). School facility adequacy standards review. Wyoming School Facilities Department.

Goetz, M. (2016, October). A Talk on ESSA and Funding Equity. Presentation at the Florida Association of School Business Officials (FASBO) 2016 Annual Conference, St. Augustine, FL.

Goetz, M. & Katz, L. (2016, September). How EdFinTech Supports Financial Analysis for Schools and Equity for Students. Presentation at the Education Technology Innovation Summit (ETIS), Baltimore, MD.

Picus, L., Goetz, M., Taylor, L., O'Donnell, M., & Willmarth, M. (2014, March). Wyoming School Finance: Fifteen Years of Reform. Presentation at the meeting of the Association for Education Finance and Policy (AEFP), San Antonio, Texas.

Goetz, M. Griffith, M., Odden, A., Picus, L., Aportela, A., & Williams, A. (2014). Adequacy for Excellence in Kentucky. (Prepared for Council for Better Education.) Hollywood, CA: Picus Odden & Associates.

Picus, L., Odden, A., Goetz, M. Griffith, M., Glenn, W., Hirshberg, D., and Aportela, A. (2014). An independent review of Maine's Essential Programs and Services Funding Act. (Prepared for Maine Legislature's Joint Standing Committee on Education and Cultural Affairs.) Hollywood, CA: Lawrence O. Picus & Associates.

Goetz, M. (2013, March). When money really matters. Presentation at the meeting of the Association for Education Finance and Policy (AEFP), New Orleans, Louisiana.

Goetz, M. (2013). Spending money smartly: Resource alignment tools. (Prepared for the Bill and Melinda Gates Foundation.) Georgetown, KY: RSEC, LLC.

Picus, L., Odden, A., Goetz, M., and Aportela, A. (2012). Estimating the cost of an adequate education for Texas school districts using the evidence-based approach. Hollywood, CA: Lawrence O. Picus & Associates.

2.2.9 Provide a brief description of the length of time vendor has been providing services described in this RFP to the public and/or private sector.

Cross & Joftus began its policy and education finance practice upon its founding in 2004. However, the Principal Investigators' experience spans decades. Christopher Cross began working on issues of education policy nearly half a century ago, and Richard Seder's work in education finance spans two decades.

2.2.10 Financial information and documentation to be included in accordance with *Section 8.5, Part III – Confidential Financial Information*.

2.2.10.1 Dun and Bradstreet Number

145953829

2.2.10.2 Federal Tax Identification Number

65-1223386

2.2.10.3 The last two (2) years and current year interim:

C&J celebrated its thirteenth anniversary this year. During that time, we have never experienced any financial difficulties. For example, we have never operated at a loss and we have always paid our vendors and associates within 30 days as required by our contracts. In addition, although we have a line of credit from Wells Fargo, C&J has never had to use it.

Our revenue for the last four years is:

2013: $3.5 million
2014: $4.5 million
2015: $4.9 million
2016: $4.4 million

SUBCONTRACTOR INFORMATION

Subcontractors are defined as a third party, not directly employed by the contractor, who shall provide services identified in this RFP. This does not include third parties who provide support or incidental services to the contractor.

2.2.11 Does this proposal include the use of subcontractors?

Yes		No	***X***

If "Yes", vendor shall:

2.2.11.1 *Identify specific subcontractors and the specific requirements of this RFP for which each proposed subcontractor shall perform services.*

N/A

2.2.11.2 *If any tasks are to be completed by subcontractor(s), vendors shall:*

Describe how the work of any subcontractor(s) shall be supervised, channels of communication shall be maintained and compliance with contract terms assured; and

Describe your previous experience with subcontractor(s).

N/A

2.2.11.3 *Provide the same information for any proposed subcontractors as requested in Section 3.1, Vendor Information.*

N/A

2.2.11.4 *Vendor shall not allow any subcontractor to commence work until all insurance required of the subcontractor is provided to the vendor.*

N/A

2.2.11.5 *Vendor shall notify the using agency of the intended use of any subcontractors not identified within their original proposal and provide the information originally requested in the RFP in Section 3.2, Subcontractor Information. The vendor shall receive agency approval prior to subcontractor commencing work.*

We acknowledge and agree to this condition.

BUSINESS REFERENCES

2.2.12 Vendors shall provide a minimum of three (3) business references from similar projects performed for private and/or public sector clients within the last three (3) years.

Reference 1:
Matt Willmarth, School Finance Analyst
Wyoming Legislative Service Office
213 State Capitol
Cheyenne, WY 82002
307-777-7881
matthew.willmarth@wyoleg.gov

Cross & Joftus conducted a study of state-level educational governance for the Wyoming legislature. The study focused on the relationship between the allocation of responsibilities and accountabilities and engaged stakeholders across the state in discussions of organizational structures to support strong leadership, clear guidance, and effective, timely support to schools and districts.

Reference 2:
Suzanne Mulcahy, Assistant Superintendent of Curriculum, Instruction, and Student Support
Hawaii Department of Education
1390 Miller Street
Honolulu, HI 96813
808-586-3230
Suzanne_Mulcahy@notes.k12.hi.us

In April 2017, Dr. Seder assisted the Hawaii Department of Education's Committee on Weights on issues of adequacy and equity during review of the state's weighted student formula. He also assisted the Hawaii Department of Education in restructuring their Program Administration and Compliance office and as a methodological expert on the Technical Advisory Group for their educator effectiveness system.

Reference 3:
Kei-Lin Cerf, Director of Strategic Community Development; Director of Hokupaa Collective Impact Initiative
University of Hawaii-Hilo
47-4629 Honokaa Waipio Road
Honokaa, Hawaii 96727
808-238-0880
klcerf@hawaii.edu

Dr. Seder has assisted the Hokupaa Collective Impact Initiative since 2015 and their efforts to improve the educational, social-emotional, and workforce outcomes of West Hawaii's youth. He has assisted with problem identification, root cause analyses, improvement strategies, resource alignment and allocation, and evaluation.

Reference 4:

Tom Shelton, Executive Director
Kentucky Association for School Superintendents
2331 Fortune Drive, Suite 285
Lexington KY 40509
859-381-4104
tom.shelton@kysupts.org

Dr. Goetz led a study of the Kentucky school finance system with funding from the Council for Better Education. This study included an advisory board, members who had diverse interests in the education system. Through a combination of professional judgement panels and in-depth review of research, he developed a school-level model of adequate resources. Goetz presenting these findings in multiple reports and invited talks to various interested stakeholders.

Reference 5: Gerald Zahorchak, Superintendent (Retired)
Allentown School District
31 S. Penn Street
Allentown, PA 18102
484-765-4001
Jerryz8551@yahoo.com

C&J conducted an extensive resource review partnership with Education Resources Strategies and provided guidance and recommendations to the district on resource allocation, staffing efficiency and distributions, and the use of data to improve decision-making. The review included district budget analysis, school funding analysis, class size analysis, and analysis of staffing patterns and professional development spending.

2.2.13 Vendors shall submit *Attachment E, Reference Questionnaire* to their business references.

In lieu of requests for our clients to complete this task, we have included letters of references and contact information, and we encourage the state of Nevada to contact our references.

2.2.14 It is the vendor's responsibility to ensure that completed forms are received by the Purchasing Division on or before the deadline as specified in *Section 7, RFP Timeline* for inclusion in the evaluation process. Reference Questionnaires not received, or not complete, may adversely affect the vendor's score in the evaluation process.

2.2.15 The State reserves the right to contact and verify any and all references listed regarding the quality and degree of satisfaction for such performance.

We encourage the state of Nevada to contact any of our references to learn more about the quality of the services we provide and the satisfaction of our clients.

Section VII – Attachment F – Proposed Staff Resume(s)

The team led by Cross & Joftus includes professionals who have the necessary subject matter expertise and experience to provide high-quality information to the Nevada Legislature and Nevada Department of Education across the wide range of needs identified in this study. The leadership team for this recalibration includes:

CROSS & JOFTUS PROJECT TEAM LEADERS	*ROLES (and subject matter expertise)*
Christopher T. Cross	*Partner-in-Charge & Co-Principal Investigator; Cross & Joftus Chairman Governance, policy analysis and development, served as a key member of Gates Foundation study on school finance and a former president of the Maryland State Board of Education. Expertise also in federal policy and implications for state school finance.*
Richard C. Seder, Ph.D.	*Co-Principal Investigator; Cross & Joftus Senior Associate* *School finance and funding formula design, costs of education, economics of education and cost-benefit analysis, early childhood finance, at-risk student allocations and use, small schools and districts resource.*
Michael Goetz, Ph.D.	*Cross & Joftus Senior Associate* *School finance and funding formula design, weighted-student formulas, costs of education, resource (re)allocation and use, cost-effectiveness and return on investment analysis*
Sharon Deich	*Project Senior Advisor; Cross & Joftus Senior Partner* *Resource allocation and effective use, extended-day/year programs*
Ginger Simon	*Project Manager; Cross & Joftus Senior Associate*

Bios for these individuals are included below, and their full resumes are included in Section VIII – Other Informational Materials.

Christopher T. Cross is chairman of the education policy consulting firm Cross & Joftus, where he contributes his considerable strategic planning, policy analysis, and development skills. Cross also serves as a distinguished senior fellow with the Education Commission of the

States and is a consultant to the Broad Foundation. Previously, he was a senior fellow with the Center for Education Policy.

From 1994 to 2002, Cross was president and chief executive officer of the Council for Basic Education (CBE). Before joining CBE, he served as director of the education initiative of The Business Roundtable and as assistant secretary for educational research and improvement in the U.S. Department of Education. Cross served as president of the Maryland State Board of Education from 1994 to 1997 and was a member from 1993 to 1997. He also was a member of the National Education Commission on Time and Learning.

He chaired the National Assessment of Title I Independent Review Panel on Evaluation for the U.S. Department of Education from 1995 to 2001 and the National Research Council Panel on Minority Representation in Special Education from 1997 to 2002. Cross also chaired the National Research Council panel on Early Childhood Mathematics. He served on the board of The New Teacher Project for 12 years, is a member of the board of the Center on the Division of Behavioral and Social Sciences and Education of the National Academies of Sciences and a commissioner of the senior division of the Western Association of Schools and Colleges. In 2002, Cross guided the negotiated rule-making process on Title I for the U.S. Department of Education.

In 2001, he completed a six-year term on the Board of International Comparative Studies in Education for the National Research Council. In addition, he chaired the National Council for Education and Humanities Development of The George Washington University from its inception in 2000 through 2002.

The first edition of his book, Political Education: National Policy Comes of Age, was published in 2003 by Teachers College Press, and the second edition, Political Education: Setting the Course for State and Federal Education Policy, was published in 2014. The new edition expands on the first, examining the people and events that shaped federal K-12 education policy from WWII to the Obama Administration and introducing new insights into the future of federal education policy. Cross is also the co-editor of Minority Students in Special and Gifted Education, published in 2002 by National Academies Press. He has lectured on American education issues in Japan, Hong Kong, and the United Arab Emirates.

Cross holds a Bachelor of Arts degree from Whittier College and a Master of Arts degree in government from California State University, Los Angeles.

Richard C. Seder, Ph.D. is senior associate at Cross & Joftus and president and senior improvement consultant at Emergent Policy & Systems, Inc. He brings nearly 20 years of education policy experience including direct work in school finance equity and adequacy with local, state, and national and international policymakers and stakeholders. Dr. Seder has worked with the State of Wyoming almost continuously since 2001 designing, developing, and assisting with the implementation of its school funding formula including the estimation of base funding levels, an innovative at-risk funding adjustment that increased in weights as concentrations of economically disadvantaged and English learner students increased in a school, and small school and small district adjustments. He was instrumental in the State being released from Court jurisdiction by testifying for more than four days translating the complicated intricacies of the state's funding formula and the research-based rationale for each aspect of the funding formula. As a result, Dr. Seder was retained by the State of

Wyoming's Attorney General's Office of School Finance Litigation to provide oversight of the state's transition of funding formulas and to assist the Wyoming Department of Education in its implementation, and by the Wyoming School Facilities Department to help design and implement systems to identify and remedy school district capital construction needs.

In addition to his designation in Connecticut and prior designation in Wyoming, Dr. Seder served as an expert witness on issues related to school finance equity and adequacy in Montana where he worked with the state to successfully defend its school finance system. He also served in a litigation support role in Massachusetts (for the state) and Texas, each finding verdicts in favor of his clients. In each of these roles, Dr. Seder was responsible for critically reviewing adequacy studies, often having the courts dismiss those adequacy studies as evidence because of poor quality and other technical deficiencies. Dr. Seder has designed and conducted adequacy and program costing studies in Massachusetts, Minnesota, New York, Texas, Washington, and Wyoming using a combination of professional judgment and evidence-based methodologies.

Richard has also worked with ministries of education and non-governmental organizations (e.g., UNICEF) on issues related to early childhood development finance and governance in Cambodia, Laos, Angola, and Tajikistan. In Tajikistan, Dr. Seder created a funding model that was piloted by the national government that was transparent and efficient in its ability to fund for school size, program differences, and unique community characteristics.

Richard most recently served as the associate director and lead of all research and evaluation activities for the Regional Educational Laboratory serving the Pacific region under a $25.4 million, five-year contract funded by the Institute of Education Sciences, the research arm of the U.S. Department of Education. While there, he oversaw work related to ensuring college and career readiness, strengthening teacher effectiveness, engaging families and communities, and developing meaningful education management information systems. He worked closely with the Secretary of Education in the Federated States of Micronesia and the U.S. Department of the Interior on issues related to declining U.S. funding support and developing strategic plans for transition.

Seder served as education policy fellow with the California Secretary of Education where he worked on issues of other post-employment benefits (i.e., unfunded liabilities of retiree pension and health benefits) and translated the landmark Getting Down to Facts research and briefed the executive branch on interpretation and implications. He then worked with Cross & Joftus and stakeholders across California to translate the school finance, accountability, and governance research into actionable policies. In 2001, he also worked as part of a team to develop the initial comparative methodologies of financial, demographic, and achievement data for the Standard & Poor's School Evaluation Services.

He earned his Bachelor of Arts degree from Beloit College with a double major in government and economics and management, Master of Science in Public Policy & Management from Carnegie Mellon University, and doctorate from the University of Southern California in Education Policy & Organization with emphasis in school finance.

Michael Goetz, Ph.D. is a senior associate at Cross & Joftus and Executive Director of Research for Social and Educational Change (RSEC). His clients include the Bill and Melinda Gates Foundation, Council for Better Education, Foundation for Child Development,

National Academies of Education, Allovue, National Center for Innovation in Education, and several legislative and gubernatorial committees.

Goetz leads projects related to educational policy and school finance research. He has worked with academics and policymakers to analyze fiscal data and develop Evidence-Based and Professional Judgment models for PK-12 school finance adequacy in Kentucky (2014), Maine (2012-13), Texas (2012), North Dakota (2007-08), Arkansas (2005-06), Washington (2005-06), Wisconsin (2005-06), Wyoming (2005-06), and Arizona (2003-04). Goetz has also performed analyses of school-based resource allocation and restructuring in Hawaii, Missouri, New Jersey, Washington, Wisconsin, and Wyoming.

Goetz's most recent adequacy work was in Kentucky (2014). Dr. Goetz led a Kentucky school finance adequacy study using multiple methods for the Council for Better Education. He led an advisory board of policy leaders in the creation of an adequate funding structure, which RSEC, LLC then brought to practitioners across the state for their input. Goetz created an Excel-based spreadsheet model that provided accessibility, usability, and transparency to school funding decisions. The KY School Finance Model was school-based and designed to instantly exhibit cost ramifications of policy decisions.

In each study of state school funding systems, Goetz developed the funding models that operationalize adequate education systems. These models (currently the basis of Arkansas and Wyoming formulas), are used not only to represent the dollars necessary for constitutional adequacy, but instantaneously relay to policymakers cost implications of resourcing strategies.

Before focusing on school finance policy, Goetz was a Researcher with the Consortium for Policy Research in Education (CPRE) at the University of Wisconsin—Madison. Prior to joining CPRE, he managed K-8 educational centers for Score Learning, Inc. in New York and taught middle school math and science in Kansas City.

Dr. Goetz received a B.A. in Educational Studies from Washington University in St. Louis and a Ph.D. in Educational Leadership and Policy Analysis at University of Wisconsin—Madison. He received a Wisconsin-Spencer Doctoral Research Program Fellowship, a dissertation grant from the American Educational Research Association (AERA), and the American Education Finance Association (AEFA) New Scholar Award.

Sharon Deich is a senior partner and Vice President at Cross & Joftus. Sharon has helped clients such as federal and state agencies, state and city officials, and foundation initiative leaders think strategically about how to organize their resources to support change. She brings considerable experience in school finance and after-school programming to serve at-risk youth. Sharon's many years of working for the Urban Institute, American Institutes for Research, and The Finance Project have afforded her a unique ability to find practical solutions grounded in research.

Her work builds on two decades of experience in the nonprofit sector that includes research, policy analysis, and technical assistance. She works with federal agencies, state government leaders, city officials, foundation initiative leaders, and non-profit organizations on issues related to early care, K-12 education, after-school programming, and related education reform efforts.

From 1997 to 2007, Deich served as an associate director for The Finance Project, where she authored numerous briefs and reports on the financing of human services programs and provided technical assistance and expert facilitation to organizations looking to scale up and sustain promising initiatives. During this period, she also served on numerous advisory boards, including one for a joint project of the National Governors Association, the Council of Chief State School Officers, and the National Conference of State Legislatures to expand extra learning opportunities as a way to improve student success.

Before joining The Finance Project, Deich spent 15 years researching and evaluating programs that support low-income children and families. Her prior experience includes work for the American Institutes for Research, where she worked closely with the Head Start Bureau to revise performance standards and the training and technical assistance system. She also spent six years working at the Urban Institute, where she was a contributing researcher and author for the National Child Care Study.

Deich earned her bachelor's degree in economics from The State University of New York at Albany and earned her master's degree in public policy from the University of Michigan.

Ginger Adams Simon is a senior associate with Cross & Joftus. In the last 12 years, she has worked at education policy centers at two universities, conducted educational research, developed policy, managed implementation efforts and led numerous large projects involving educators and education stakeholders. Ginger has extensive project management experience. In 2011 she served as lead writer and quality control manager of a Special Education evaluation project with LAUSD and the California Charter Schools Association, and in 2012 was the project director for the Digital Learning Resources Project for the Smithsonian Center for Learning and Digital Access (SCLDA). From 2007-2010 she served as Project Manager for the California Department of Education's "Brokers of Expertise (BOE) project. BOE was a web portal for California teachers, providing free, open, standards-based materials and resources as well as professional networking.

In the policy arena, prior the moving to CA, Ginger was Associate Director of the Center for Greater Philadelphia, a Public Policy Center at the University of Pennsylvania. She then moved to the UC Davis School of Education's Center for Applied Policy in Education (CAP-Ed) where she was as a lecturer and policy analyst (2006-2010). While there, she worked on numerous programs, including the development of their Superintendent's Executive Leadership Forum (SELF) and CDEs P-16 initiative. Most recently (2013-2016), Ginger served as Director of Professional Capital for CORE Districts, a collaborative of eight districts across California receiving a Federal Waiver from ESEA requirements. Over 3 years, she created and facilitated a collaborative learning environment for central administrators and others in the districts as they developed and implemented new teacher and leader evaluation systems. Ginger received her doctorate in Education Leadership from the University of Pennsylvania in 2005 and lives in Davis, CA.

Additional subject matter experts on the Cross & Joftus team and their project roles are provided in the below table. Their full bios are included in Section VIII – Other Informational Materials.

CROSS & JOFTUS SUBJECT MATTER EXPERTS	*EXPERTISE (and NV project tasks)*
Kenji Hakuta, Ph.D.	***English language learners***
Ricki Meyer, J.D.	***Policy analysis, legal analysis, special education***
Kershini Naidu,	***At-risk multi-tier systems of support, special education***
Alice Parker, Ed.D.	***Early childhood and early elementary education, special education***
Alexa Posney, Ph.D.	***Special education***
Connie Wehmeyer	***Director of Teaching and Learning for Cross & Joftus, curriculum and instruction, school and district improvement***
Robin Wisniewski, Ph.D.	***At-risk multi-tier systems of support, special education***

VENDOR STAFF RESUMES – Proposal Format

A resume shall be completed for each proposed key personnel responsible for performance under any contract resulting from this RFP per ***Attachment F, Proposed Staff Resume.***

Proposed Staff Resumes are included in the pages that follow.

PROPOSED STAFF RESUME FOR RFP 3489

A resume must be completed for all proposed prime contractor staff and proposed subcontractor staff.

Company Name Submitting Proposal:	***Cross & Joftus, LLC***

Check the appropriate box if the proposed individual is prime contractor staff or subcontractor staff.			
Contractor:	***X***	**Subcontractor:**	

The following information requested pertains to the individual being proposed for this project.			
Name:	***Christopher Cross***	**Key Personnel: (Yes/No)**	***Yes***
Individual's Title	***Chairman***		
# of Years in Classification:	***13***	**# of Years with Firm:**	***13***

BRIEF SUMMARY OF PROFESSIONAL EXPERIENCE

Information should include a brief summary of the proposed individual's professional experience.

Christopher Cross is a former Assistant Secretary for Educational Research and Improvement at the U.S. Department of Education and former president of the Maryland State Board of Education. He works with clients such as the Aspen Institute, California Department of Education, and Education Commission of the States to disseminate promising practices and connect policymaking to critical research. Chris is a noted author and expert on the federal role in education and serves on numerous high-profile advisory boards.

RELEVANT EXPERIENCE

Information required should include: timeframe, company name, company location, position title held during the term of the contract/project and details of contract/project.

Cross has worked with various facets of education policy in Nevada for over 20 years. He served as the chief advisor to the Council on Academic Standards, provided direction for the state's application under the Race to the Top competition for the Blue Ribbon Commission and has testified before the state legislature.

In his role with the Council on Academic Standards, Cross and his team from the Council for Basic Education, where he was then the CEO, facilitated and guided the development of the first set of standards in the period from 1997-1999. Cross continued in the role of chief advisor to the Council until 2004. He continued his involvement in education in NV as a consultant to Wynn Resorts and in that role supported the interests of Wynn, specifically Elaine Wynn, in her interests in that field.

When the Race to the Top initiative was announced in the U.S. Department of Education in 2009, Governor Jim Gibbons appointed a Blue Ribbon Commission on Education Reform in the state and asked Elaine Wynn and Dan Klaich, then chancellor of the Nevada, to co-chair that group. Cross was hired immediately as the chief advisor to the Blue Ribbon Committee and worked extensively for the Committee on the Nevada application through 2010 and beyond. Although NV did not win a grant in this competition, the application became a blueprint for changes that were later proposed by Governor Brian Sandoval.

EDUCATION

Information required should include: institution name, city, state, degree and/or Achievement and date completed/received.

Master of Arts degree in government from California State University, Los Angeles – 1970
Bachelor of Arts degree from Whittier College – 1962

CERTIFICATIONS

Information required should include: type of certification and date completed/received.

N/A

REFERENCES

A minimum of three (3) references are required, including name, title, organization, phone number, fax number and email address.

Matt Willmarth, School Finance Analyst
Wyoming Legislative Service Office
307-777-7881
matthew.willmarth@wyoleg.gov

Punam Mathur, Executive Director
Elaine P. Wynn & Family Foundation
702-454-9966 ph
702-586-7576 f
punam@ewfamilyfoundation.org

Eugene Chasin, COO
Say Yes to Education
860-240-1272 ph
860-240-1275 f
echasin@sayyestoeducation.org

PROPOSED STAFF RESUME FOR RFP 3489

A resume must be completed for all proposed prime contractor staff and proposed subcontractor staff.

Company Name Submitting Proposal:	***Cross & Joftus, LLC***

Check the appropriate box if the proposed individual is prime contractor staff or subcontractor staff.			
Contractor:	***X***	**Subcontractor:**	

The following information requested pertains to the individual being proposed for this project.			
Name:	***Richard C. Seder***	**Key Personnel: (Yes/No)**	***Yes***
Individual's Title	***Senior Associate***		
# of Years in Classification:	***11***	**# of Years with Firm:**	***11***

BRIEF SUMMARY OF PROFESSIONAL EXPERIENCE

Information should include a brief summary of the proposed individual's professional experience.

Richard Seder brings nearly 20 years of working in partnership with school and system leaders to take on education's chronic and persistent challenges through policy and systems analysis, research and evaluation, change management and coaching, and evidence use. He has worked with local, state, and national and international policymakers and nonprofit organizations to systematically and systemically improve schooling outcomes. He has nationally recognized expertise in school finance adequacy and equity and the design and implementation of effective and efficient school funding formulas.

RELEVANT EXPERIENCE

Information required should include: timeframe, company name, company location, position title held during the term of the contract/project and details of contract/project.

Performed domestic and international cost studies and developed comprehensive school funding systems that recognize dual requirements of equity and adequacy, including review of formula weights and overall funding levels to reflect district, school, and student needs.

State of Colorado (Present)—Senior Consulting Associate. Cross & Joftus. Assist the Interim Committee on School Finance with the review of current finance and funding system and design and development of new finance and funding formula, including factors for at-risk students, English learners, students with disabilities, school district characteristics, and the use of categorical programs as matter of governance and accountability.

Hawaii Department of Education (2016)—Principal Investigator. Emergent Policy & Systems, Inc. Assisted the Committee on Weights to understand issues related to equity and adequacy and served as a resource to the Committee in discussions related to weights for children in poverty, English learners, and other student-related factors.

State of Connecticut (2016)—Expert Witness. Emergent Policy & Systems, Inc. Served as an expert witness in Connecticut Coalition for Justice in Education, Inc. et al. v. M. Jodi Rell, et al. Identified "bright spots" to understand higher-than-expected-performing schools and districts to understand those resource factors in an efficient and effective education system. Superior Court, Judicial District of Hartford. September 7, 2016. (https://assets.documentcloud.org/documents/3100630/School-Funding-Decision.pdf)

Tajikistan (2012)—Principal Investigator. Emergent Policy & Systems, Inc. Served as consultant to UNICEF Tajikistan and the Tajikistan Ministry of Education. Designed and implemented new funding mechanisms for early learning in Tajikistan in three pilot provinces that used student, school, and community characteristics to distribute resources. Funding formula has since gone nationwide.

Angola (2012)—Investigator. Emergent Policy & Systems, Inc. Served as the finance and funding lead on a multifunctional team exploring how to create effective early childhood education programs and systems. Developed understanding governance of early childhood development and education systems and services in low-income countries (includes Cambodia, Lao PDR, and Angola).

Cambodia and Lao PDR (2011)—Investigator. Emergent Policy & Systems, Inc. Served as the finance and funding lead on a multifunctional team exploring how to create effective early childhood education programs and systems. Developed situation analysis for governance and finance of early childhood development services in Cambodia and Lao PDR.

State of Montana (2008)—Expert Witness. Emergent Policy & Systems, Inc. Served as an expert witness in Columbia Falls Elementary School District No. 6 v. Montana. Created rational basis for the operations of the school funding formula on issues of equity and adequacy. First Judicial District Court of Montana, Lewis and Clark County. December 15, 2008. (http://leg.mt.gov/content/Publications/fiscal/Education/CF-Decision-II.pdf)

State of Wyoming (2005)—Expert Witness. Emergent Policy & Systems, Inc. Served as expert witness in the case, Campbell County School Dist. v. State (Campbell IV). Testified to the rationality and cost justifications of work completed over the prior four years. Created new distribution formulas for at-risk students, small schools and districts, among the many pieces of a newly designed funding formula. Wyoming Supreme Court. January 8, 2008. (http://legisweb.state.wy.us/LSOWeb/SchoolFinance/Documents/Campbell_IV.pdf)

Minnesota (2004)—Senior Consulting Associate, Principal Investigator. Management Analysis & Planning. Designed and led a professional judgment study to estimate adequate education funding in Minnesota. Estimates included weights for at-risk, English learner, and students with disabilities.

New York (2004)—Senior Consulting Associate. Management Analysis & Planning. Part of the analytic team that designed and led a professional judgment study to estimate the cost of providing all children in New York an adequate education. Estimates included weights for at-risk, English learner, and students with disabilities.

Texas (2004)—Senior Consulting Associate. Management Analysis & Planning. Served as the principal investigator in the design and implementation of professional judgment panels to estimate the cost of meeting state educational standards.

State of Massachusetts (2003)—Senior Consulting Associate. Management Analysis & Planning. Provided litigation support in the case of Julie Hancock v. David P. Driscoll, Commissioner of Education. Designed and implemented professional judgment panels to estimate the costs of education, including those resources needed for at-risk students, English learners, and students with disabilities. Supreme Judicial Court. February 15, 2005. (https://www.masslegalservices.org/system/files/library/hancock_v_driscoll_sjc.doc)

State of Wyoming (2001 to Present)—Consultant. Provided policy analysis and development to the Wyoming State Legislature on issues of monitoring and accountability, equitable and adequate school funding, and educator effectiveness; systems analysis for the Attorney General's Office of School Finance Litigation; and implementation assistance to the Wyoming Department of Education and School Facilities Department with emphasis on data collection, management, reporting, and use.

EDUCATION

Information required should include: institution name, city, state, degree and/or Achievement and date completed/received.

PhD, Education Policy and Governance, University of Southern California, Los Angeles, CA, 2009.

MS, Public Policy and Management, Carnegie Mellon University, Pittsburgh, PA, 1997.

BA, Economics and Management and Government, Beloit College, Beloit, WI, 1994.

CERTIFICATIONS

Information required should include: type of certification and date completed/received.

Not applicable

REFERENCES

A minimum of three (3) references are required, including name, title, organization, phone number, fax number and email address.

Michael O'Donnell
Assistant Attorney General
State of Wyoming
(Office) 307-777-8935
michael.odonnell@wyo.gov

Suzanne Mulcahy
Assistant Superintendent
Hawaii Department of Education
(Mobile) 808-382-6332
Suzanne_Mulcahy@notes.k12.hi.us

Walter Kahumoku, III
Title III Director
University of Hawaii – West Oahu
(Office) 808-689-2922
wk@hawaii.edu

PROPOSED STAFF RESUME FOR RFP 3489

A resume must be completed for all proposed prime contractor staff and proposed subcontractor staff.

Company Name Submitting Proposal:	***Cross & Joftus, LLC***

Check the appropriate box if the proposed individual is prime contractor staff or subcontractor staff.			
Contractor:	***X***	**Subcontractor:**	

The following information requested pertains to the individual being proposed for this project.			
Name:	***Michael Goetz***	**Key Personnel: (Yes/No)**	***Yes***
Individual's Title	***Senior Associate***		
# of Years in Classification:	***1***	**# of Years with Firm:**	***1***

BRIEF SUMMARY OF PROFESSIONAL EXPERIENCE

Information should include a brief summary of the proposed individual's professional experience.

Michael Goetz, Ph.D. is a senior associate at Cross & Joftus and executive director of Research for Social and Educational Change (RSEC). His clients include the Bill and Melinda Gates Foundation, Council for Better Education, Foundation for Child Development, National Academies of Education, Allovue, National Center for Innovation in Education, and several legislative and gubernatorial committees. Goetz leads projects related to educational policy and school finance research. He has worked with academics and policymakers to analyze fiscal data and develop Evidence-Based and Professional Judgment models for PK-12 school finance adequacy in Kentucky, Maine, Texas, North Dakota, Arkansas, Washington, Wisconsin, Wyoming, and Arizona. Goetz has also performed analyses of school-based resource allocation and restructuring in Hawaii, Missouri, New Jersey, Washington, Wisconsin, and Wyoming.

Goetz's most recent adequacy work was in Kentucky. Dr. Goetz led a Kentucky school finance adequacy study using multiple methods for the Council for Better Education. He led an advisory board of policy leaders in the creation of an adequate funding structure, which RSEC, LLC then brought to practitioners across the state for their input. Goetz created an Excel-based spreadsheet model that provided accessibility, usability, and transparency to school funding decisions. The KY School Finance Model was school-based and designed to instantly exhibit cost ramifications of policy decisions. In each study of state school funding systems, Goetz developed the funding models that operationalize adequate education systems. Before focusing on school finance policy, Goetz was a Researcher with the Consortium for Policy Research in Education (CPRE) at the University of Wisconsin—Madison. Prior to joining CPRE, he managed K-8 educational centers for Score Learning, Inc. in New York and taught middle school math and science in Kansas City.

RELEVANT EXPERIENCE

Information required should include: timeframe, company name, company location, position title held during the term of the contract/project and details of contract/project.

Michael Goetz has worked with private and non-profit education organizations for two decades. In each of his roles, whether research- or operations-based, Michael has focused on determining the programs and policies that affect student academic and social learning, and most recently, how fiscal resources, mediated by programs, promote student growth. His work is as a consultant in these areas.

EDUCATION

Information required should include: institution name, city, state, degree and/or Achievement and date completed/received.

Dr. Goetz received a B.A. in Educational Studies from Washington University in St. Louis (1996) and a Ph.D. in Educational Leadership and Policy Analysis at University of Wisconsin—Madison (2012). He received a Wisconsin-Spencer Doctoral Research Program Fellowship, a dissertation grant from the American Educational Research Association (AERA), and the American Education Finance Association (AEFA) New Scholar Award.

CERTIFICATIONS

Information required should include: type of certification and date completed/received.

N/A

REFERENCES

A minimum of three (3) references are required, including name, title, organization, phone number, fax number and email address.

Tom Shelton, PhD
Executive Director
Kentucky Association of School Superintendents
(859) 568-2140 Office – main
(859) 592-4920 Office - direct
(859) 351-6884 Mobile

Anabel Aportela
Director of Research
Arizona School Boards Association
Arizona Association of School Business Officials
Phx 85004

Lisa Katz
Sr. Director of Research and Analysis
Discovery Education
443-205-5285
Lisa_Katz@discovery.com

PROPOSED STAFF RESUME FOR RFP 3489

A resume must be completed for all proposed prime contractor staff and proposed subcontractor staff.

Company Name Submitting Proposal:	***Cross & Joftus, LLC***

Check the appropriate box if the proposed individual is prime contractor staff or subcontractor staff.			
Contractor:	***X***	**Subcontractor:**	

The following information requested pertains to the individual being proposed for this project.			
Name:	***Sharon Deich***	**Key Personnel: (Yes/No)**	***Yes***
Individual's Title	***Chairman and Partner***		
# of Years in Classification:	***10***	**# of Years with Firm:**	***10***

BRIEF SUMMARY OF PROFESSIONAL EXPERIENCE

Information should include a brief summary of the proposed individual's professional experience.

Sharon Deich is Vice President of Cross & Joftus, where she focuses on education financing issues and change management. Deich directs a series of projects that include providing technical assistance to nine cities that are working to build citywide after school systems; conducting financial analyses for school districts looking to reallocate resources toward priority areas; and assisting non-profits with strategic planning. Her work builds on two decades of experience in the nonprofit sector that includes research, policy analysis, and technical assistance. She works with federal agencies, state government leaders, city officials, foundation initiative leaders, and non-profit organizations on issues related to early care, K-12 education, after-school programming, and related education reform efforts.

RELEVANT EXPERIENCE

Information required should include: timeframe, company name, company location, position title held during the term of the contract/project and details of contract/project.

Prior to the work described above, Deich served as an associate director for The Finance Project from 1997 to 2007, where she authored numerous briefs and reports on the financing of human services programs and provided technical assistance and expert facilitation to organizations looking to scale up and sustain promising initiatives. During this period, she also served on numerous advisory boards, including one for a joint project of the National Governors Association, the Council of Chief State School Officers, and the National Conference of State Legislatures to expand extra learning opportunities as a way to improve student success.

EDUCATION

Information required should include: institution name, city, state, degree and/or Achievement and date completed/received.

Master of Public Policy, University of Michigan Institute of Public Policy Studies, 1984
Bachelor of Science, Economics, State University of New York at Albany, 1979

CERTIFICATIONS

Information required should include: type of certification and date completed/received.

N/A

REFERENCES

A minimum of three (3) references are required, including name, title, organization, phone number, fax number and email address.

Dale Anglin, Senior Program Officer
Victoria Foundation
Phone: (973) 792-9200
danglin@victoriafoundation.org

Priscilla Little, Initiative Manager, Learning and Enrichment
The Wallace Foundation
Phone: (212) 251-9780,
plittle@wallacefoundation.org

Gerald Zahorchak, Superintendent (Retired)
Allentown School District
484-765-4001
Jerryz8551@yahoo.com

PROPOSED STAFF RESUME FOR RFP 3489

A resume must be completed for all proposed prime contractor staff and proposed subcontractor staff.

Company Name Submitting Proposal:	***Cross & Joftus, LLC***

Check the appropriate box if the proposed individual is prime contractor staff or subcontractor staff.			
Contractor:	***X***	**Subcontractor:**	

The following information requested pertains to the individual being proposed for this project.			
Name:	Virginia Adams Simon	**Key Personnel: (Yes/No)**	***Yes***
Individual's Title	Senior Associate, Project Manager		
# of Years in Classification:	35	**# of Years with Firm: 12**	

BRIEF SUMMARY OF PROFESSIONAL EXPERIENCE

Information should include a brief summary of the proposed individual's professional experience.

In the last 12 years, Dr. Simon has worked at education policy centers at two universities, conducted educational research, developed policy, managed implementation efforts and led numerous large projects involving educators and education stakeholders.

RELEVANT EXPERIENCE

Information required should include: timeframe, company name, company location, position title held during the term of the contract/project and details of contract/project.

In 2011, Virginia served as lead writer and quality control manager of a Special Education evaluation project with LAUSD and the California Charter Schools Association, and in 2012 was the project director for the Digital Learning Resources Project for the Smithsonian Center for Learning and Digital Access (SCLDA). From 2007-2010 she served as Project Manager for the California Department of Education's "Brokers of Expertise (BOE) project. BOE was a web portal for California teachers, providing free, open, standards-based materials and resources as well as professional networking.

EDUCATION

Information required should include: institution name, city, state, degree and/or Achievement and date completed/received.

2005: University of Pennsylvania, Graduate School of Education
Education Doctorate (Ed.D.). Mid-Career Doctoral Program in Educational Leadership

1989: University of Pennsylvania, Graduate School of Education
Masters of Science in Education (MS of Ed), Independent Schools Program

1983: Hobart and William Smith Colleges
Bachelor of Arts (BA), Major fields of study: English, Education, Art History

CERTIFICATIONS

Information required should include: type of certification and date completed/received.

1983: New York State Teaching Certificate

REFERENCES

A minimum of three (3) references are required, including name, title, organization, phone number, fax number and email address.

1) Rick Miller, Partner, Capitol Impact, Sacramento and Executive Director of CORE Districts
Rick@coredistricts.org
(916) 441-2917

2) Michelle Steagall, Chief Academic Officer, CORE Districts, Sacramento
Michelle@coredistricts.org
(559) 260-2950

3) Julie Maxwell-Jolly, Director of Research, California School Boards Association, Sacramento
jrmaxwelljolly@csba.org
(916) 669-3261

Section VIII – Other Informational Materials

Subject Matter Expert Bios

Kenji Hakuta, Ph.D. is Lee Jacks Professor of Education, emeritus, at Stanford University. He has held full-time faculty positions at Yale University and the University of California, Santa Cruz. During 2003-2006 he helped start the University of California, Merced as its Founding Dean of Social Sciences, Humanities and Arts. He has several hundred publications, and is most noted for his 1986 book, Mirror of Language: The Debate on Bilingualism. In addition to his academic writings, Kenji is a leading expert in the area of English Language Learners (ELLs) at the federal, state, and local district levels. Since the early 1990's, he has worked within the policy and practice arenas toward the inclusion of ELLs in reform efforts, particularly around bilingual education and standards-based reform.

Kenji has served at the federal level through service in various capacities, including serving on many committees and panels of the National Research Council as well as the National Academy of Education and chairing the National Educational Research Policy and Priorities Board of OERI (predecessor to the Institute for Education Sciences) from 1995-2004. At the state level, Kenji has provided significant and long-term support for a variety of states, including California and New York. During the past 3 years, he has also served as advisor to the Council of Chief State Schools Officers for the "ELL SCASS", a learning community of state directors of ELL programs from over 35 states that convene tri-annually to share practice and conduct practice-based research on various aspects of ELL education at the state level. He collaborated with states through the CCSSO to develop new English Language Proficiency Standards as well as to launch ELPA21 – an annual assessment of English language proficiency used by 10 states.

Kenji's scholarly contributions have been recognized by many honorary societies; he is a fellow of the American Association for the Advancement of Science, the American Educational Research Association, the American Academy of Arts and Sciences, and the National Academy of Education. His education includes a Ph.D. in Experimental Psychology from Harvard University.

Ricki Meyer, J.D. is an attorney with background in special education and disability rights. She has experience working at the U.S. Departments of Education and State in Washington, D.C., as well as various state-level offices in Massachusetts. Ricki has most recently worked as a disability rights consultant and a teaching fellow for special education policy at the Harvard School of Education.

Ricki is admitted to practice law in Massachusetts. She earned her B.S. in Social Policy from Northwestern University, Ed.M. from Harvard Graduate School of Education, and J.D. from Boston University School of Law.

Kershini Naidu (PhD Candidate, Educational Leadership), is director of Student Services and Special Education for Orange City Schools (OH) and an independently licensed and nationally certified school psychologist. In addition to her 19 year career of public school service, she has served as adjunct faculty at Notre Dame College and Kent State University where she instructs college level pre-service teachers in assessment for disabilities, strategies to increase achievement motivation among struggling learners, progress monitoring and intervention

adherence, and reflective teaching practice using data-based decision making. As an independent consultant, Ms. Naidu provides professional development and conducts special education, curriculum, and equity audits to local school districts. Ms. Naidu is a mixed-methods researcher focused in evidence-based practices and equity in special education, completing her dissertation entitled Voices of Special Education Leaders: Perspectives on Implementation of Evidence Based Practices. Ms. Naidu has published and presented in areas of effective multi-disciplinary team collaboration, Functional Behavior Assessment (FBA), removing barriers for students in poverty, creating achievement opportunities, and effective partnerships and collaborations for low-incidence disabilities.

Alice Parker, Ed.D. is C&J's National Director of Special Education. She has more than 40 years of experience in the classroom as a building principal, a district administrator, and an assistant superintendent of public instruction for California. Her areas of expertise include public policy and practice as well as special education models that meet federal and state compliance but are rooted in the Response to Intervention approach and are focused on improved outcomes for all children at risk of school failure. She has worked as a consultant to state departments of education, local school districts, and charter management organizations and agencies and provided support, consultation, and training in improving leadership; reducing disproportion; supporting effective education programs for adjudicated youth; and implementing Response to Intervention, inclusive preschool options, and systems change. Parker has a doctorate from the University of San Francisco in Education-Organization and Leadership, a Masters in Communicative Disorders from San Francisco State University, and a B.A. from Indiana University in Speech Pathology and Audiology.

Alexa Posney, Ph.D. has almost four decades of experience in education, from classroom teacher to Chief State School Officer to Assistant Secretary of the Office of Special Education and Rehabilitative Services in the U.S. Department of Education. Dr. Posny was most recently the Senior Vice President of State and Federal Programs for Renaissance Learning.

Dr. Posny served as Assistant Secretary of the Office of Special Education and Rehabilitative Services (OSERS) in the U.S. Department of Education from 2009-2012. In this position, she played a pivotal role in policy and management issues affecting special education and rehabilitative services across the country. She also served as the principal adviser to the U.S. Secretary of Education on all matters related to special education. Prior to arriving at the Department, Dr. Posny served as the Commissioner of Education for the Kansas State Department of Education (KSDE) from 2007-2009, Director of the Office of Special Education Programs for the U.S. Department of Education (2006 -2007), deputy commissioner of education at KSDE (2001-2006), state director of special education at KSDE (1999 to 2001), and the director of special education for the Shawnee Mission School District in Overland Park, KS (1997-1999). Prior to that, she was the Director of the Curriculum and Instruction Specialty Option as part of the Title 1 Technical Assistance Center (TAC) network of TACs across the United States and a Senior Research Associate at Research and Training Associates in Overland Park, KS. Dr. Posny has also served on the board of directors for the Chief State School Officers and the National Council for Learning Disabilities and chaired the National Assessment Governing Board's Special Education Task Force.

Dr. Posny earned her Ph.D. in educational administration from the University of Wisconsin at Madison, where she also minored in special education. She earned a master's degree in

behavioral disabilities from the University of Wisconsin at Madison and a bachelor's degree in sociology and psychology from the University of Wisconsin at Stevens Point.

Connie Wehmeyer, Ph.D., is an associate partner and the Director of Teaching and Learning for Cross & Joftus, has more than 30 years of experience as a teacher, teacher leader, assistant superintendent of teaching and learning, and school improvement specialist for the Kansas State Department of Education. Her areas of expertise include curriculum and instruction, school and district improvement, and educational leadership. She recently developed a training and delivery model to support district and state implementation of the Common Core Standards. Support resources include a needs assessment to determine district readiness and guide the planning process and on-line clearinghouse of vetted resources that include instructional supports for ELA/Literacy and math, teacher and principal professional development, and parent communication. Wehmeyer has lead Root Cause Analysis work at the district and state level to identify effective use of Title Program dollars, improve processes and procedures to support student learning, and guide educational program development. She has significant experience with needs analysis and technical assistance to turnaround schools and districts resulting in increased student achievement for all students in low performing schools and districts. Her work with districts has resulted in articulated instructional frameworks, professional development plans, classroom observations tools and protocols, and professional learning community structures and processes.

Wehmeyer earned a Ph.D. in Curriculum and Instruction and a Master's in Educational Leadership from the University of Kansas and a Bachelor's in Elementary Education from Pittsburg State University. She holds credentials as a building leader and school district superintendent.

Robin Wisniewski, Ph.D. is director of Education Systems Improvement at RTI International, a licensed psychologist, and nationally certified school psychologist. She has been consulting with school districts and related education organizations for 17 years and spent 13 years in universities as a faculty member (tenured), graduate program director, acting associate dean, fellow to an academic vice president, academic success administrator, and director of a center for students with learning and attention challenges. In these positions she served at-risk students, taught special education courses. As director of research and consulting at McREL International, Dr. Wisniewski led systems improvement efforts for the Republic of Palau with goals of closing achievement gaps and increasing graduation rates and led numerous equity-focused local continuous improvement efforts 20 states (e.g., in special education, literacy, instruction, standards and assessment), including a redesign of the professional learning system of all school districts in Florida. Dr. Wisniewski has taught 132 course sections in higher education and led over 300 presentations, seminars, and sessions for school districts, universities, and organizations with education missions.

Letters of Reference

OMAHA Public Schools
SUPERINTENDENT'S OFFICE

Mark A. Evans
Superintendent

P 531-299-9822
F 531-299-0415

3215 Cuming Street
Omaha, NE 68131

district.ops.org

Board of Education
Lacey Merica
President
Marque A. Snow
Vice President
Tracy Casady
Lou Ann Goding
Shavonna L. Holman
Ben Perlman
Amanda L. Ryan
Matt Scanlan
Yolanda R. Williams

September 4, 2017

To Whom It May Concern:

This letter serves as a reference for the consulting firm Cross & Joftus (C&J).

I first got to know C&J in the fall of 2013. I had just started as superintendent of OPS and wanted to conduct a comprehensive needs assessment and develop a five-year strategic plan. My team learned about C&J from the Council of the Great City Schools, which recommended them for the job and, after a competitive proposal process, we selected them to be a vendor.

After four years of working together, we at OPS no longer consider C&J to be a vendor—we now consider them partners in the journey to improve outcomes for 52,000 young people. For the needs assessment, C&J engaged stakeholders from across the community and developed findings and recommendations that were data informed, thoughtful, and actionable. Like me, C&J focuses on the coherence of systems, strategies, and structures, and C&J clearly pointed to strengths of our system (e.g., very engaged and supportive community, a very strong instructional framework) as well as challenges (e.g., alignment of key systems, instructional leadership among principals, implementation of initiatives). C&J used the findings and recommendations to further engage stakeholders and helped to facilitate a bold and clear strategic plan that had wide support among our community.

Based on C&J's outstanding work, I asked them to support implementation of several strategies in the new plan, including helping to coach our principals and principal supervisors and facilitating the development of a principal pipeline. Throughout their work, C&J partners and associates demonstrate professionalism and outstanding relationships with staff and community members, all with a humility that is refreshing.

Since I started and C&J began working with us in 2013, student achievement in the district is up and school quality has improved. According to a recent op-ed in the Omaha World-Herald: "Students are achieving better academic outcomes, including those learning English or coming from backgrounds of generational poverty. Ten schools identified by the State of Nebraska as poor performers over time are showing gains in academic performance."

Let me be clear: C&J is not the only cause of these gains. I have an outstanding staff that needed a clear vision and direction that I was able to provide. But I value the partnership with C&J immensely and would strongly recommend them to any district.

Please don't hesitate to contact me if you have any questions.

Sincerely,

Mark Evans, Superintendent
Omaha Public Schools

Every student. Every day.
Prepared for success.

September 13, 2017

To Whom It May Concern:

I am writing this letter as a reference for the education consulting firm Cross & Joftus (C&J).

I got to know C&J right before the 2014-15 school year. We at the District of Columbia's Office of the State Superintendent of Education (OSSE) were looking to improve our support for low-performing schools when Scott Joftus, president of C&J, presented the work that they had done for five years in Kansas called the Learning Network. We were impressed with the results of the work but also appreciated the approach, which focused on building the capacity of school leadership teams through collaboration and performance management.

As a result, we hired C&J to work with our eight lowest performing schools (DCPS and charters) during the 2014-15 school year. The launch of the LSN in both the DCPS and charter schools was met with a level of skepticism and, in some cases, resistance. However, resistance faded as it became apparent to educators and administrators that C&J's team was knowledgeable and that they were effective collaborators and coaches who did not come across as "above it all." C&J coaches rolled up their sleeves and applied gentle pressure to principals in staying focused on the strategies that emerged from careful root cause analyses as well as the support the principals needed to be successful.

Based on the feedback we received from educators and administrators and data we collected on the schools' progress, we expanded the Learning Support Network in school year 2015-16 and then again in 2016-17, when C&J worked with the 25 lowest performing schools in Washington, DC.

Throughout the three years that C&J has worked with OSSE to manage the Learning Support Network, C&J has been a wonderful partner. Their team is made up of experienced, thoughtful educators who have served in almost every capacity in public education. This experience, I believe, gives them the understanding that there is no silver bullet in education but rather that improvement takes focus, effective coaching, content expertise, constant capacity building, and outstanding performance management. The C&J team helps us and the schools track progress in a way that improves implementation and leads to results.

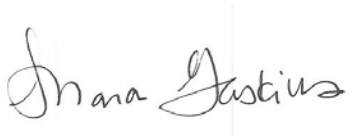
And we are beginning to see results. For example, of the 16 participating priority schools with which C&J worked during the 2016-17 school year, 11 schools showed gains in math with nine of them outpacing average gains for all schools in the District. In ELA, 13 out of

16 schools showed gains in ELA from the previous school year, all of them outpacing average gains for all schools in the District.

Although it is impossible to attribute the gains in student achievement to the Learning Support Network (or any other initiative) alone, almost all participating principals cited in interviews that the LSN is a great benefit to them and a significant contributor to their schools' improvement.

We are proud of the work we have accomplished with the support of Cross & Joftus, and I wouldn't hesitate to recommend them to any school system looking to improve. Feel free to contact me at sharon.gaskins@dc.gov or at (202) 654-6112 to discuss my experience working with C&J in further detail.

Sincerely,



Sharon Gaskins
Deputy Assistant Superintendent
Division of Elementary, Secondary and Specialized Education

2102 SW Village Hall Road
Topeka, KS 66614
August 9, 2017

Recommendation for Cross & Joftus (C&J)

As the former Commissioner of Education for the State of Kansas, it is my pleasure to submit this letter of recommendation for Cross & Joftus (C&J).

The Kansas State Department of Education (KSDE), under the leadership of Dr. Alexa Posny, hired C&J in 2008 to pilot their new approach to school and district improvement called the Kansas Learning Network (KLN). During 2008-09 school year, C&J piloted KLN in the state's highest need districts (Kansas City, Wichita, Topeka, Garden City, and Turner). Based on the improvement in student achievement among these districts and the feedback that we received from school, district, and state administrators, I decided to expand C&J's work to include all districts in need of improvement (this was still during the NCLB era) for the 2009-10 school year when Dr. Posny left and I was appointed Commissioner. By year four, C&J was working with all 36 districts and 43 schools identified as being on improvement in Kansas.

During their time working in Kansas, student achievement in KLN schools and districts not only increased but increased at a faster rate than non-KLN districts and schools. Just as importantly, school and district administrators told us and evaluators that they greatly valued the support provided by C&J and attributed much of their gains to their work with KLN. This was a critical finding at a time when KSDE was working to overcome a poor reputation and difficult relationship with schools and districts in the state.

I attribute much of the C&J's success to their professionalism, their collaborative approach, and their ability to contextualize the services. The C&J staff have a tremendous amount of expertise, but they approach the work in a humble way, working collaboratively and respectfully with education leaders while still pushing for excellence. I truly valued the partnership that I had with them during my tenure in Kansas, and strongly recommend them to any school system.

Please feel free to contact me if you have any questions or desire additional information about Cross & Joftus.

Sincerely,

Diane M. DeBacker
Former Kansas Commissioner of Education

Project Team Full Resumes

CROSS & JOFTUS

Christopher T. Cross

109 Sunhaven Rd. | Danville, CA 94506 | 925-314-1863 Office | 925-683-4877 Cell | chris@edstrategies.net

Experience

Private Sector

Chairman, Cross & Joftus, LLC	2004-present
Independent Consultant and Author	2001-2004
President and Chief Executive Officer, Council for Basic Education	1994-2001
Executive Director Education Initiative, The Business Roundtable	1991-1994
Vice-Chairman, Macro Systems, Inc., a Maryland-based professional services technical assistance and training company	1989
President and Executive Vice President (Chief Operating Officer), University Research Corporation, a Maryland-based professional services, research and information services company	1983-1988
Manager Federal Systems, Westinghouse Information Services, Westinghouse Learning Corporation	1980-1983
Director of Public Policy Analysis & Director, Washington Office Operations, Abt Associates, Inc.	1978-1980

Public Sector

President, Maryland State Board of Education, member since 1993	1994-1997
Assistant Secretary for Educational Research and Improvement, U.S. Department of Education	1989-1991
Republican Staff Director and Senior Education Consultant, U.S. House of Representatives Committee on Education and Labor	1972-1978
Deputy Assistant Secretary for Legislation (Education), U.S. Department of Health, Education, and Welfare	1970-1972

Education

Leadership Development Program University of Maryland, Center for Creative Leadership	1988
Master of Arts (Government), California State University, Los Angeles	1970
Bachelor of Arts (Political Science), Whittier College, California	1962

Professional Activities

Member, Advisory Board, Division of Behavior, Social Science and Education (DBASSE), National Research Council, National Academy of Sciences	2012-present
Commissioner, Western Association of Schools and Colleges, Senior Division	2011-present
Member, President's Advisory Council, Alliance for Excellent Education	2011-present
Advisory Board, National Center for Time and Learning	2008-present
Board of Directors, New Teacher Project	2001-2013
Distinguished Senior Fellow, Education Commission of the States	2001-2007, 2013-present
Senior Fellow, Center on Education Policy	2001-2005
Consultant, School Evaluation Service, Standard and Poor's	2000-2005
Board of Directors, EdSource	2003-2009
Chair, National Council on Education and Human Resources, Graduate School on Education and Human Resources, George Washington University	2000-2001
Board of Advisors, Schoolnet.com	2000-2010
Member, U.S. Education For All Assessment Report Oversight Commission	2000-2002
Member, Board of Trustees Vice-Chair of Academic Affairs Committee, Whittier College	2000-2011
Member, Board of Visitors College of Education, University of Maryland	2000-2001
Chair National Research Council Panel on the Representation of Minorities in Special Education, National Academy of Sciences	1999-2002
Board of Directors, Teacher Education Accreditation Council	1999-2002
Member, PEW Forum on Standards-based Education	1997-2001
Member, Maryland K-16 Educational Leadership Council	1997–2001
Chair, Board of Directors, Center on Education Policy	1997-2001

Professional Activities (cont.)

Member Board of International Comparative Studies In Education, National Research Council, National Academy of Sciences	1995-2001
Chair, Independent Review Panel on the Evaluation of Federal Education Programs, U.S. Department of Education	1995-2001
Executive Board, Consortium for Policy Research in Education (CPRE)	1995-2005
Member, Board of Directors, American Institutes for Research (AIR)	1993-2007
Advisory Committee, Superintendents Prepared, an urban leadership development consortium of the Institute for Educational Leadership, Joint Center for Political and Economic Studies, and the McKenzie Group	1991-1996
Member, National Education Commission on Time and Learning	1992-1994
Member, Board of Directors, Institute for Educational Leadership	1992-1994
Team Captain, *The Prune Book,* Council for Excellence in Government (Madison Books, 1992)	1992
Member, U.S. delegation to the U.S.-Japan Conference on Cultural and Education Interchange (CULCON)	1991
Member, Advisory Council on Arts Education, National Endowment for the Arts	1991-1993
Co-Leader, U.S. Department of Labor-sponsored delegation – members represented government, business, and labor leadership initiative toward an understanding of the education and training of the Japanese workforce	1990
Member, U.S. delegation at the World Conference on Education for All "Meeting Basic Learning Needs" in Jom Tiem, Thailand, sponsored by various member United Nations agencies	1990
Member, U.S. Holocaust Memorial Council	1989-1991
Chairman, Working Group, Committee on Education and Human Resources, Federal Coordinating Council for Science, Engineering and Technology (EHR/FCCSET)	1989-1991
U.S. Member, Governing Board of the Center for Educational Research and Development of the Organization for Economic Cooperation and Development and the Center for Education Research and Innovation (OECD/CERI)	1989-1991
Member, National Assessment Governing Board (NAGB)	1989-1991
Team Captain, *The Prune Book,* Council for Excellence in Government (Madison Books, 1988)	1988
Chairman, Laboratory Review Panel, U.S. Department of Education	1987-1989
Member, National Research Council/National Academy of Sciences Panel on Education Evaluation	1979-1981

Professional Membership/Honors

Director, Council for Excellence in Government	1986-1989
Member, U.S. Chamber of Commerce, Council on Procurement Policy	1985-1989
Member, American Society of Training and Development	1984-1989
Member, American Educational Research Association	1980-1991
Professional Services Council	1980-1989
▪ **Member, Executive Committee**	1988-1989
▪ **Vice Chairman**	1983-1985
▪ **Chairman, Government Relations Committee**	1988
Recipient of numerous citations from the Professional Services Council for industry leadership in areas related to Federal procurement	1978-1989
Recipient of the Secretary's Special Citation from HEW Secretary Elliot L. Richardson	1973

Selected Publications and Presentations

Political Education: Setting the Course for State and Federal Policy, Teachers College Press, New York, 2014.

Political Education: National Policy Comes of Age, Teachers College Press, New York, 2003.

Mathematics Learning in Early Childhood: Paths Toward Excellence and Equity, Christopher T. Cross, Taniesha A. Woods, and Heidi Schweingruber, *Editors*; Committee on Early Childhood Mathematics; National Research Council , 2009.

Minority Students in Gifted and Special Education, edited by Donovan and Christopher T. Cross, National Academy Press, Washington, DC, 2002.

“The U.S. Needs a National Policy on Education,” *Teachers College Record*, July 6, 2015.

“How to Confront America’s International Skills Gap,” Education Week, June 24, 2015.

“The Shaping of Federal Education Policy Over Time,” *Education Commission of the States*, Volume 16, Number 2, May 2015.

"A Chance for Education," *The Baltimore Sun,* January 8, 2001.
"Assessment, TIMSS-R, And the Challenge to Change," *Basic Education,* Volume 45, Number 5, January 2001.

Putting the Pieces Together: Lessons from Comprehensive School Reform Research, National Center on Comprehensive School Reform, George Washington University, 2004.

"The Role of the Principal as Instructional Leader in a Standards-Driven System," *NASSP Bulletin,* Volume 84, Number 620, December 2000.

"The Passing of an American Hero," *The Rock: The Magazine Whittier College,* Volume 71, Number 2, Fall 2000.

“Too Much of a Good Thing,” *Basic Education*, Volume 45, Number 2, October 2000.

“Academic Standards and Comprehensive School Reform,” *The National Clearinghouse For Comprehensive School Reform,* September 2000.

Review of *The Academic Achievement Challenge: What Really Works in the Classroom,* Jeanne S. Chall, *American School Board Journal,* June 2000.

“A Tax Cut That Keeps on Giving,” *Washington Post***,** August 14, 1999.
“It’s Time for Congress to Repeal the Foundation Tax,” *The Chronicle of Philanthropy,* July 29, 1999.
“Standards and Local Control: ‘Clarifying the School Board’s Role,’” *The American School Board Journal,* April 1999.
“Education reform takes a regional focus,” *The Baltimore Sun,* March 1999.
“Retirees in the Classroom,” *The Washington Post,* December 31, 1998.
“The Standards Wars: Some Lessons Learned,” *Education Week,* October 21, 1998.
“Stretching Students’ Minds in Basic Education,” *Educational Leadership,* March 1998.
“Are Academic Standards a Threat or an Opportunity?” *NASSP Bulletin,* September 1997.
“U.S. Educational System Seeks Wholesale Reform,” *Forum for Applied Research and Public Policy,* Volume 12, Number 3, Fall 1997.
“LAUSD is Setting the Right Standards,” *The Los Angeles Daily News,* July 2, 1997.
“The Superintendent’s Role in State Assessments,” *The School Administrator,* September 1997.
“Stumping for Standards,” *Education Week,* April 9, 1997.
“Using Standards in Charter Schools,” *Presentation at the Charter School Developer Conference,* Teacher College.
“The Downsizing of Corporate Philanthropy,” *Education Week,* June 7, 1995.
“Making Sense of the New Standards,” *The College Board Review,* Spring 1994.
“Shall We Put the ‘E’ Back in H.E.W.?” *Education Week,* February 9, 1994.
“Proceed with Caution,” *Teacher*, October 1993.
“Policy Analysts and Researchers,” *Federal Policy Options for Improving the Education of Low-Income Students, Volume II, Commentaries,* Institute on Education and Training, RAND Corporation, Spring 1993, edited by Iris C. Rothberg.
“Education Standards: A Question of Time?” *Education Week,* April 21, 1993.
“Advice to a New Administration,” *Education Week,* February 3, 1993.
“Will Congress Save Our Schools from the Tyranny of Red Tape?” *Phi Delta Kappan,* April 1993, written with S. Nathan Cross.
“From The Business Roundtable: A Business Perspective on Education,” *National Issues in Education/The Post is Prologue,* Phi Delta Kappan and the Institute for Educational Leadership, 1993, Edited by John F. Jennings.
“Student Effort: The Key to Higher Standards,” *Educational Leadership,* written with Tommy Tomlinson.
Speaker at annual conferences of many major national associations and at state-level meetings on education reform including the National School Board Association, the American Association of School Administrators, the Association for Supervision and Curriculum Development, the National Association of State Boards of Education, and the Education Commission on the States. 1973-Present.

RICHARD CHOE SEDER

1464 Halekoa Drive
Honolulu, Hawaii 96821

Summary of Professional Experience

Richard Seder brings nearly 20 years of working in partnership with school and system leaders to take on education's chronic and persistent challenges through policy and systems analysis, research and evaluation, change management and coaching, and evidence use. He has worked with local, state, and national and international policymakers on school finance adequacy and equity and the design and implementation of effective and efficient school funding formulas.

Education

PhD, Education Policy and Governance, University of Southern California, Los Angeles, CA, 2009.
MS, Public Policy and Management, Carnegie Mellon University, Pittsburgh, PA, 1997.
BA, Economics and Management, Beloit College, Beloit, WI, 1994.

Selected Project Experience

State of Wyoming (2005 to Present)—*Consultant*. Provided policy analysis and development to the Wyoming State Legislature on issues of monitoring and accountability, equitable and adequate school funding, and educator effectiveness; systems analysis for the Attorney General's Office of School Finance Litigation; and implementation assistance to the Wyoming Department of Education and School Facilities Department with emphasis on data collection, management, reporting, and use.

Pacific needs assessments and scans (2015 to 2016)—*Principal Investigator*. Conducted educational needs assessments and systems maps with educational leaders in Hawaii, American Samoa, the Commonwealth of the Northern Mariana Islands, Guam, Federated States of Micronesia, Republic of the Marshall Islands, and Republic of Palau. Through partnership-level engagements, worked with school and system leaders to assess internal culture, conditions, and capacities to improve educational outcomes in each entity. Developed initial capacities to use improvement science tools and organize Networked Improvement Communities to pursue the work of improvement.

Office of Program Administration and Compliance (2015)—*Principal Investigator*. Provided technical assistance to the Hawaii Department of Education in reviewing their reorganization with special attention to the proposed Office of Program Administration and Compliance. Created the job description and minimum requirements for the director.

Regional Educational Laboratory for the Pacific Region (2012 to 2013)—*Associate Director*. Under contract with the Institute of Education Sciences, the research arm of the U.S. Department of Education, coordinated analytical technical assistance and research and evaluation services to build a deep, cohesive body of knowledge around critical problems of practice and policy identified by local research-practice partnerships across the U.S.-affiliated Pacific region. Served as the lead for all research and evaluation projects serving the research-practice partnerships.

Relevant Professional Experience

2005 to date — Emergent Policy & Systems, Inc., Honolulu, HI.

Systems Improvement Consultant. Assisted national, state, and local stakeholders with policy and systems analysis, research and evaluation, development of legislation and rules and regulations, and implementation in preschool, K–12, and higher education. Served on the State of Hawaii Department of Education technical advisory group providing methodological and policy analysis related to the state's educator effectiveness system. Developed systems, processes, and formal rules and regulations for newly created state agency to improve effectiveness and efficiency of service delivery to internal and external stakeholders. Performed domestic and international cost studies and developed comprehensive school funding systems that recognize dual requirements of equity and adequacy, including review of formula weights and overall funding levels to reflect district, school, and student needs. Investigated early childhood development finance and governance structures in Cambodia, Lao PDR, Angola, and Tajikistan. Developed ECD teachers data collection instrument for UNESCO and Southeast Asia Ministers of Education Organization. Assessed multiagency information management needs and developed action plans to improve accuracy, reliability, accessibility, and timeliness of data; managed cross-agency data exchange using memoranda of understanding. Engaged state department, legislative, and school stakeholders to identify meaningful, relevant, and actionable indicators for purposes of continuous improvement and accountability, and ensured methodological soundness of analytical approaches and reporting.

2015 to 2017 — RTI International, Honolulu, HI.

Director of Education Partnerships. Provide vision and strategy development, analytical technical assistance, research and evaluation, and implementation guidance to existing and emerging multidisciplinary school–community partnerships in Hawaii, the mainland United States, and across the Pacific. Conduct comprehensive needs assessments, root cause analyses, systems visioning, asset mapping, readiness assessments, and goal-setting activities to support partnership needs. Guide partnerships through disciplined continuous improvement processes that emphasize learning within the partnership and across partnerships through networks. Assist philanthropy in transitioning strategic plans into implementation plans to better identify points of entry and support. Serve as an intermediary broker to connect service needs with appropriate service providers.

2006 to 2008 — Office of the Secretary of Education, Sacramento, CA.

Education Policy Fellow. Investigated pressing policy issues confronting California public schools including resource allocation and long-term debt of schools and institutions of higher education. Developed policy alternatives and strategies for California Secretary of Education. Reviewed and translated comprehensive set of research conducted on the finance, governance, and

efficiency of California's public education system for the agency, and coordinated policy efforts with various state agencies and stakeholder groups.

2004 to 2007 University of Southern California, California Policy Institute, Sacramento, CA.

Education Policy Program Director. Synthesized and summarized leading research to inform general public on direct ballot initiatives on issues of school finance, higher education accountability, early childhood education, and teacher quality. Secured external funding for projects translating academic research to more effectively engage state policymakers and connecting pressing policy issues to researchers. Developed outreach strategies positioning University of Southern California–based research into the hands of practitioners and policymakers.

2001 to 2004 Management Analysis & Planning, Inc., Davis, CA.

Senior Consulting Associate. Performed education policy, program, and management analyses for national, state, and local governments and organizations. Designed and implemented cost studies of core education and opportunity-to-learn programs. Led the development of effective and efficient research-based solutions to improve public education systems, including the development of systems, processes, and technology solutions. Provided litigation support in school funding adequacy lawsuits across the nation.

2000 to 2001 Standard & Poor's School Evaluation Services, New York, NY.

School Evaluation Services Associate. Analyzed school administrative data to provide unbiased information to school district officials, policymakers, parents, taxpayers, and other interested community groups. Designed and implemented statistical methodologies for consistent data analysis, and formed best-practice identification strategy of school districts with similar circumstances in urban, suburban, and rural settings.

2000 to 2000 Reason Public Policy Institute, Los Angeles, CA.

Director of Education Policy Program. Advised local, state, and national policymakers on unique and innovative governance, accountability, and management strategies, including the use of public-private partnerships. Developed and managed research agenda, funding proposals, staff, and budgets.

1996 to 1997 Allegheny County Public Schools Systems Synthesis Project, Pittsburgh, PA.

Project Manager. Evaluated 43 independent public school districts within Allegheny County, Pennsylvania, using four criteria: accountability, autonomy, efficiency, and equity. Performed quantitative and qualitative analyses of budgets, student performance data, surveys, and on-site interviews of urban, suburban, and rural school leaders. Presented findings and recommendations to panel of education leaders, researchers, and community members.

Professional Service

President, Hawaii Educational Research Association, 2016 & 2017

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Georgetown, KY 40324
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EDUCATION

University of Wisconsin—Madison – *Madison, WI* 2012
Ph.D., Department of Educational Leadership and Policy Analysis
Concentrations in school finance policy and research methods. Dissertation: When money *really* matters: Tying specific programmatic and instructional elements to student academic growth, using 3-level HLM analysis of a representative sample of 1st grade students.

Washington University in St. Louis – *St. Louis, MO* 1996
B.A., College of Arts and Sciences
Concentrations in educational foundations, political science, and history

EXPERIENCE

Research on Social and Educational Change (RSEC) – *Georgetown, KY* 2003-present
Executive Director
Work with policymakers and academics to analyze fiscal data and develop models for PK-12 school finance adequacy in Arkansas, Arizona, Kentucky, Maine, North Dakota, Texas, Washington, and Wyoming. Analyze school-level resource strategies in Arkansas, Maine, North Dakota, Washington, and Wyoming. Develop a cost framework for preschool education and research effective district-level resource reallocation tools. Clients include Bill and Melinda Gates Foundation, Council for Better Education, Foundation for Child Development, National Academies, Jefferson County Public Schools, Picus Odden & Associates, and several legislative and gubernatorial committees.

Allovue – *Baltimore, MD (remote)* 2016-2017
Director of Research
Conceptualized products to link school/district fiscal resources to student academic learning. Productized intra-district equity analyses, fiscal case studies, and experimental and quasi-experimental effectiveness research. Infused research design into professional development, customer service, and technology departments.

University of Wisconsin—Madison – *Madison, WI* 2008-2009
Instructor, Department of Educational Leadership and Policy Analysis
Taught graduate-level courses in Financing Elementary and Secondary Education. Developed syllabi, delivered lectures, and facilitated discussions on issues of school finance at the national, state, district, and school levels.

Consortium for Policy Research in Education (CPRE) – *Madison, WI* 2003-2008
Research Staff
Analyzed the correlation between school fiscal resources, teacher practice, and student academic growth. Determined the level and distribution of resources in schools undergoing comprehensive school reform. Designed school finance adequacy models for the Wisconsin public school finance system. Researched school level resource allocation in five states. Built a national and state level model of school finance. Reviewed human resource structures of alternative teacher and administrator programs.

SELECTED PUBLICATIONS

Borman, G., Goetz, M., & Dowling, M. (2009). Halting the summer achievement slide: A randomized evaluation of the *KindergARTen* Summer Camp. *Journal of Education for Students Placed At Risk, 14*(2), 133-147.

Odden, A., Goetz, M., & Picus, L. (2008). Using available evidence to estimate the cost of educational adequacy. *Education Finance and Policy*, *3*(3), 374-397.

Odden, A., Goertz, M., Goetz, M., Archibald, S., Gross, B., Weiss, M., & Mangan, M. (2008). The cost of instructional improvement: Resource allocation in schools using comprehensive strategies to change classroom practice. *Journal of Education Finance.* 2008, *33*(4), 382-405.

Odden, A., Goetz, M., & Picus, L. (2010). Merging costs with effective resource strategies. In J. Adams, *Smart money: Using educational resources to accomplish ambitious learning goals*. Cambridge, MA: Harvard Education Press, 141-156.

SELECTED PRESENTATIONS

Goetz, M. (2016, October). *A Talk on ESSA and Funding Equity*. Presentation at the Florida Association of School Business Officials (FASBO) 2016 Annual Conference, St. Augustine, FL.

Goetz, M. & Katz, L. (2016, September). *How EdFinTech Supports Financial Analysis for Schools and Equity for Students*. Presentation at the Education Technology Innovation Summit (ETIS), Baltimore, MD.

Picus, L., Goetz, M., Taylor, L., O'Donnell, M., & Willmarth, M. (2014, March). *Wyoming School Finance: Fifteen Years of Reform*. Presentation at the meeting of the Association for Education Finance and Policy (AEFP), San Antonio, Texas.

Goetz, M. (2013, March). *When money really matters: Tying resources of specific programmatic and instructional elements to student academic growth.* Presentation at the meeting of the Association for Education Finance and Policy (AEFP), New Orleans, Louisiana.

Goetz, M. (2010, March). *Including community and parent engagement in estimating the national cost of an integrated pre-K-3rd program.* Presentation at the meeting of the American Education Finance Association (AEFA), Richmond, Virginia.

Goetz, M., Baker, B., & Imazeki, J. (2007, March). *The political and economic impact of utilizing different approaches to adjusting for the varying purchasing power of the education dollar across*

districts within a state. Presentation at the meeting of the American Education Finance Association (AEFA), Baltimore, MD.

SELECTED TECHNICAL REPORTS AND WORKING PAPERS

Goetz, M. Griffith, M., Odden, A., Picus, L., Aportela, A., & Williams, A. (2014). Adequacy for Excellence in Kentucky. (Prepared for Council for Better Education.) Hollywood, CA: Picus Odden & Associates.

Picus, L., Odden, A., Goetz, M. Griffith, M., Glenn, W., Hirshberg, D., and Aportela, A. (2014). An independent review of Maine's Essential Programs and Services Funding Act. (Prepared for Maine Legislature's Joint Standing Committee on Education and Cultural Affairs.) Hollywood, CA: Lawrence O. Picus & Associates.

Goetz, M. (2013). Spending money smartly: Resource alignment tools. (Prepared for the Bill and Melinda Gates Foundation.) Georgetown, KY: RSEC, LLC.

Picus, L., Odden, A., Goetz, M., and Aportela, A. (2012). Estimating the cost of an adequate education for Texas school districts using the evidence-based approach. Hollywood, CA: Lawrence O. Picus & Associates.

Picus, L., Odden, A., Aportela, A., Mangan, M., & Goetz, M. (2008). *Implementing school finance adequacy: School level resource use in Wyoming following adequacy-oriented finance reform.* (Prepared for the Wyoming Legislative Services Office.) North Hollywood, CA: Lawrence O. Picus & Associates.

Odden, A., Picus, L., Goetz, M., & Aportela, A. (2008). *Funding schools adequately in North Dakota: Resources to double student performance.* (Prepared for the North Dakota Education Improvement Commission.) North Hollywood, CA: Lawrence O. Picus & Associates.

Odden, A., Picus, L., Archibald, S., Goetz, M., Mangan, M., & Aportela, A. (2006). *Moving from good to great in Wisconsin: Funding schools adequately and doubling student performance.* (Prepared for the Wisconsin School Finance Adequacy Task Force.) Madison, WI: Wisconsin Center for Education Research, Consortium for Policy Research in Education.

Odden, A., Picus, L., Goetz, M., Fermanich, M., & Mangan, M. (2006). *An evidence-based approach to school finance adequacy in Washington.* (Prepared for the K-12 Advisory Committee of Washington Learns.) North Hollywood, CA: Lawrence O. Picus & Associates.

Odden, A., Picus, L., & Goetz, M. (2006). *Recalibrating the Arkansas school funding structure.* (Prepared for the Adequacy Study Oversight Sub-Committee of the House and Senate Interim Committees on Education of the Arkansas General Assembly.) North Hollywood, CA: Lawrence O. Picus & Associates.

Odden, A., Picus, L., Goetz, M., Fermanich, M., Seder, R., Glenn, W, & Nelli, R. (2005). *An evidence-based approach to recalibrating Wyoming's block grant school funding formula.* (Prepared for the Wyoming Legislative Select Committee on Recalibration.) North Hollywood, CA: Lawrence O. Picus & Associates.

CROSS & JOFTUS

Sharon Gennis Deich

3807 N. Dittmar Rd. | Arlington, VA 22207| 703-534-6486 Office | sharon@edstrategies.net

Experience

Vice President, Cross & Joftus, LLC 2007-present

Directs a series of projects related to education finance reform and bridging in-school and out-of-school learning. This work involves policy research, data collection and analyses, strategic planning, meeting facilitation, evaluation and technical assistance to districts, foundations, non-profits and policy leaders.

Selected Clients and Projects include the following:

- Wallace Foundation – Providing technical assistance on financing city after school systems for nine cities. Includes the development of tools and resources, facilitating webinars and meetings, and working one-on-one with individual grantees. Ms. Deich is also directing a related project for the Foundation to identify areas and opportunities for summer and afterschool programs to strengthen alignment with the Common Core State Standards.
- Ford Foundation –Explore and document promising strategies to finance expanded learning through district-lead initiatives.
- Communities in Schools – Provide support to senior leadership to better understand the cost drivers and revenue sources for CIS affiliates.
- Hillsborough School District (FL) – Support the development of a principal pipeline. Oversaw the development of competencies and rubrics to assess the readiness of principal candidates and created a vacancy forecasting model to help the district plan more strategically for principal turnover.
- Allentown School District (PA) – Direct a resource review to identify opportunities to reallocate resources to better meet the goals of the district. Coached district staff during in-person meetings and via webinar to enhance capacity to assess resource use and allocations.
- Kansas Learning Network – Conduct an analysis of Title I funding to support district planning efforts in Wichita; supported needs assessment teams by conducted interviews with districts staff, community partners and students; help structure the design and delivery of cross-site TA for 36 districts (including network meetings, webinars and communities of practice).
- Summer Learning Association– Provide support for the Association's work on access and participation and summer transition programs including developing a methodology for conducting supply and demand analyses for summer programs in a variety of cities and states.

Associate Director, The Finance Project 1998-2007

Directed a series of projects, for public and private funders, focusing on financing and sustaining programs for children and youth. Many of these projects were in the area of afterschool programming, youth development and education reform. Directed three large national technical assistance projects that included policy research, development of tools and other resources, customized site-based technical assistance, cross-site technical assistance, meeting facilitation, webinars and forums, presentations and workshops at national and local meetings. Management responsibilities included business development; board support; hiring, mentoring and supervising employees; web development; and outreach and communications.

Selected Clients and Projects included the following:

- Cost study of high-quality afterschool programs; in partnership with Public/Private Ventures co-direct a study to collect data on the true cost of afterschool programs and systems in six cities—Funded by the Wallace Foundation

- Supporting the Development of Statewide Afterschool Networks; project director overseeing technical assistance that included developing tools and materials and identification of promising practices related to financing and sustainability, meeting facilitation, support for annual cross-site meeting of 35 state teams, and assistance to individual state teams.—Funded by the C.S. Mott Foundation
- The Afterschool Investments Project; directed this technical assistance center to support state child care administrators and their partners to improve the quality of and access to afterschool programs in partnership with the National Governors Association. This included developing tools and materials, identification of promising practices related to financing and sustainability, meeting facilitation, support for annual cross-site meeting, and assistance to individual state teams—Funded by the Federal Child Care Bureau
- Provided support to the Grantmakers Income Security Taskforce (a foundation affinity group); coordinated meetings and developed agendas to ensure that grantmakers were up to date on latest findings and to facilitate joint grant-making opportunities
- Developing a unit cost model for afterschool in Palm Beach County—Funded by the Palm Beach Children's Services Council

1992- 1997

Senior Research Analyst, American Institutes for Research

- Conducted research and evaluation studies covering a wide range of educational and human service policy issues.
- Evaluated new and existing government programs
- Prepared reports for and briefing policymakers
- Developed research designs and databases
- Administered and analyzed surveys
- Conducted site visits, interviews, panel meetings, and training conferences
- Assisted the Head Start Bureau in revising the program performance standards, accompanying program guidance, and reviewed and revised the training and technical assistance network
- Prepared a cost feasibility study for the Part H program
- Analyzed data from the National Evaluation of the Even Start Family Literacy Program
- Developed a research agenda for the newly established Early Childhood Institute, Office of Educational Research and Improvement, U.S. Department of Education

1986-1992

Research Associate, **The Urban Institute**

- Conducted research on issues related to income security policy and child care
- Developed the survey instrument and monitored the data collection process for the 1990 National Child Care Survey (NCCS)
- Conducted data analysis and report preparation for NCCS
- Acted as the Project Manager and Principle Investigator for companion studies on Military families and Low-Income Families
- Developed a model to simulate changes in the State Administrative Expense Formula for the National School Lunch Program
- Estimated the effect of valuing school nutrition benefits as income
- Developed a macroeconomic forecasting model to predict the number of meals served for the National School Lunch Program

  Evaluated the cost and redistributive effects of a variety of proposals to amend the child care tax credit

Education and Certifications

1984

Master of Public Policy, University of Michigan Institute of Public Policy Studies

1979

Bachelor of Science, Economics, State University of New York at Albany

Selected Publications

Strengthening Partnerships and Building Public Will for Out-of-School Time Programs**,** with Heather Padgette and Lane Russell. Brief prepared for the National League of Cities. Spring 2010.

Expanded Learning to Support School Reform**.** Paper prepared for National Press Club Event, January 12, 2009. Learning Points Associates. January 2009.

Dollars and Sense: A First Look at Financing A New Day for Learning**,** with Heather Padgette, Paper prepared for the Mott Foundation. Cross & Joftus, December 2008.

Funding Summer Learning Programs: A Scan of Public Investments in Maryland**,** with H. Padgette. Center For Summer Learning, Johns Hopkins University, Summer 2008.

Thinking Broadly: Financing Strategies for Youth Programs**,** Deich, S. and Hayes, C. Washington DC: The Finance Project, 2007

Creating Dedicated Local and State Revenues for Youth Programs**,** Sherman, R., Deich, S., and Langford, B. Washington DC: The Finance Project, 2007

Linking and Learning: Lessons for Afterschool from Early Childhood Systems Building Efforts, Stebbins, H and Deich, S. Washington DC: Afterschool Investments Project, 2007

Afterschool and State Education Finance Formulas: A Primer for Statewide Afterschool Networks, Deich, S., with Szkely, A. Washington DC: The Finance Project, 2006

Promoting Quality in Afterschool Programs through State Child Care Regulations**,** Szkely, A. and Deich, S. Washington DC: The Finance Project 2006

Estimating Supply and Demand for Afterschool Programs: A Tool for State and Local Policy Makers**,** E. Wright and S. Deich. Washington DC: Afterschool Investments Project 2004

Using Title I Funds for Out-of-School Time and Community School Initiatives**,** Deich, S., Wegener, V., and Wright, E. Washington, DC: The Finance Project, 2002.

Accessing Child Care Development Funds for Out-of-School Time and Community School Initiatives, Deich, S., Bryant,E., and Wright,E., Washington, DC: The Finance Project, 2001.

A Guide to Public-Private Partnerships for Out-of-School Time and Community School Initiatives, Deich, S. (Washington, DC: The Finance Project, 2001).

Financing After-School Programs, Halpern, R., Cohen, C., Deich, S. Washington, DC: The Finance Project, 2000.

Review and Revision of the Head Start Program Training and Technical Assistance Network. Sherman, R. Deich, S., and Benson, S. Pelavin Research Institute. Report prepared for the Head Start Bureau, U.S. Department of Health and Human Services, 1996.

Implementing the Part E Research Agenda: A Review of Grants Funded from 1984-1994. Kane, M.B., Azzam, R., Deich, S., Dudzik, P., Fein, M., & DelBorello, D. The Chesapeake Institute. Report Prepared for the Office of Special Education Projects, U.S. Department of Education, 1995.

Developing Performance Indicators for the National Educational Research and Development Centers. Deich, S., & Reeve, A. Draft Report prepared for the Office of Educational Research and Improvement, 1994,

Work-Based Learning**.** Deich, S. National Assessment of Vocational Education. Final Report to Congress. Office of Educational Research and Improvement, U.S. Department of Education, 1994.

CROSS & JOFTUS

Virginia Adams Simon, Ed.D.

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Experience

Director of Professional Capital, CORE Districts 2013 to 2016

Oversight of collaborative work to design new teacher and leader evaluation systems as part of the ESEA waiver received by eight California districts in 2013. Responsibilities included gaining deep knowledge of each district, working with human resource professionals and content specialists, building consensus around key indicators of quality and effectiveness, designing a rigorous peer review process, facilitating professional learning opportunities, and creating, disseminating and curating relevant research. Also served as a member of the team responsible for selecting a vendor and creating the CORE growth model.

Beyond fulfilling waiver requirements, served as creator and coordinator of ***Re-Thinking Leadership***, a partnership with Michael Fullan and Joanne Quinn to support districts in managing change and building coherent strategies for improvement. This entailed designing a 4-part series of convenings, retreats, virtual learning and book studies for cross-functional district teams over a two-year period. Also coordinated individual district coaching visits with teams to help maintain momentum and progress towards goals.

Senior Associate, Cross & Joftus, LLC 2006 - 2013

Senior Associate in education consulting group headed by Christopher Cross and Scott Joftus. Project experience in this role includes the following:

Smithsonian Center for Education Museum Studies (SCEMS) April-November 2012

Served as Project Director for *The Digital Learning Resources Project*, a research and design project whose principle aim was to offer guidance for the transition of Smithsonian's digital teaching and learning resources and toolsets into a new era. The scope of work included researching the current landscape and literature on use of digital resources by teachers and students, evaluating the current online environment provided by SCEMS, and testing new toolsets, taxonomies and interface designs with teachers. Final work products included new digital prototypes, a literature review, an environmental scan and full research report. Personal project responsibilities included:

- Management and oversight of project budget and staff
- Management and oversight of technology subcontractor
- Weekly phone meeting facilitation and documentation
- Client communications and management
- Weekly status report production
- Primary writer and coordinator of all written deliverables

Los Angeles Unified School District Charter Schools ARRA Special Education Project 2011-2012

Served as lead writer and quality control manager of $3.5 million contract with LAUSD and the California Charter Schools Association. Cross & Joftus consultants conducted a needs assessment, surveys and focus groups to examine the delivery of services to special needs students in LAUSD's Charter Schools and provide a series of implementation supports to fulfill recommendations. Personal program responsibilities included:

- Site visit and focus group coordination
- Protocol review
- Review and creation of evaluation instruments
- Analysis of data and management of data collection
- Writing and presenting final report of findings
- Stakeholder engagement
- Implementation of recommendations planning and management
- Management of technology rich classrooms grant competition
- Assisting in the development and management of two-day Educational Summit

California Department of Education's Brokers of Expertise Project 2007-2010

Served as project manager for a statewide web portal and virtual learning community for educators (www.myboe.org), sponsored by the California Department of Education. Major program responsibilities included:

- Strategy development
- Work Flow Management
- Research
- Partnership Development
- Fundraising, grant writing and reporting
- Documentation of System Requirements
- Implementation Planning
- Advisory Council Creation and Support
- Pre-Service Pilot Coordinator

University of California, Davis, School of Education 2005-2009

Lecturer and Policy Analyst: Served as Half-time policy analyst for the UC Davis Center for Applied Policy in Education (CAP-Ed). Responsibilities included:

- Research
- Development and management of Superintendents' Executive Leadership Forum (SELF)
- Organization of symposia
- Production of academic papers and reports
- Grant writing and reporting
- Teacher of undergraduate course *The Social and Philosophical Foundations of Education*

The Center for Greater Philadelphia, University of Pennsylvania 2000-2005

Associate Director: Assisted with management and strategic planning for this University-based public policy center. Budget 1.2 million for 2003-2004, staff of ten.

Program Manager, *Operation Public Education*: Manager of a statewide initiative to influence new funding legislation for Pennsylvania's K-12 public schools, accompanied by meaningful systems of accountability. The project involved working closely with the Center's Director, Dr. Ted Hershberg, to build support and consensus around the complex and controversial issues of school funding and accountability. Major program responsibilities included:

- Strategy Development
- Education and Research
- Coalition Building
- Value-added Assessment Promotion and Support

The Baldwin School, Bryn Mawr, Pennsylvania 1990-2000

Director of Admissions and Financial Aid: Managed Admissions Office for Pre-K-12 Girls' School with 620 students; increased enrollment by 23% over ten-year period; served as the Chair of the school's Diversity Committee; was faculty advisor to middle and high school students, and lead teacher for partnership program with Kensington High School in Philadelphia. Major responsibilities included:

- All aspects of recruitment, admissions programming, and marketing for the school
- Allocation of financial aid funding for 21% of student body each year (budget $1.5 million)
- Supervision, management, and evaluation of four-person staff.

George School, Newtown, PA 1985-1990

Associate Director of Admissions and Acting Director of Admissions: Managed application process for over 1000 applicants annually for coed Quaker boarding school, grades 9 to 12. Responsibilities included:

- Full oversight of programs to recruit students of color.
- Served as Acting Director while Director took a leave of absence, handling all aspects of admissions operation and including financial aid (budget $1.3 million)

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- Stoneleigh-Burnham School, Greenfield, MA 1983-1985
- Assistant Director of Admissions
- Teacher of Art History (11th Grade)
- Assistant College Counselor
- Dormitory Supervisor
- Varsity Field Hockey and Lacrosse Coach

Education

University of Pennsylvania, Graduate School of Education 2005
Education Doctorate (Ed.D.). Mid-Career Doctoral Program in Educational Leadership

University of Pennsylvania, Graduate School of Education 1989
Masters of Science in Education (MS of Ed), Independent Schools Program

Hobart and William Smith Colleges 1983
Bachelor of Arts (BA), Major fields of study: English, Education, Art History
Publications
Adams Simon, Virginia. *Compensating Educators in the Absence of Value-Added*. (Ch.7) in A Grand Bargain for Education Reform. Harvard University Press (2009).

Hershberg, Theodore, Ian Roseblum, and Virginia Adams Simon. (2003) *Adequacy, Equity and Accountability*. Commentary. Education Week. February 19th.

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