

**Local Evaluator to Conduct a Comprehensive Evaluation for
the Warren County School District 21st Century Grant
Program**

Cohort 7, Cohort 8, and Cohort 10

Submitted to:
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1.0 Introduction

The Warren County School District (the WCSD) is seeking proposals from qualified individuals and organizations that demonstrate strong evaluation experience and familiarity with 21st Century Community Learning Center (21st CCLC) grant evaluation requirements to assess the impact of the afterschool and summer programs supported by the grant.

As explained by Pennsylvania Department of Education, the 21st CCLC program is authorized under Title IV, Part B of the Elementary and Secondary Education Act (P.L. 107-110), as amended by the No Child Left Behind Act of 2001 and reauthorized by the Every Student Succeeds Act (ESSA) of 2015. The 21st CCLC program provides funding for the establishment of community learning centers to provide academic, artistic and culturally enhancement activities to students and their families when school is not in session. The primary goal of these centers is to assist students with meeting state and local standards for core subjects such as reading and mathematics, by providing students with academic enrichment opportunities. In addition to academics, centers may also offer participants a broad array of other services and programs, such as art, music, service learning, character education, drug and violence prevention programming, recreation activities and technology education. These opportunities may take place before school, after school and/or during the summer. Ancillary services for parents such as literacy instructions may also be given. After the conclusion of each program year, a local evaluation report must be submitted assessing the impact of the annual program offerings.

1.1 Background

Located in Warren County, Pennsylvania, in the northwest corner of the state, the Warren County School District had 4,219 enrolled students for the 2018-2019 academic year. The Warren County School District serves students across a 788 square mile area, which makes the district the second largest in the state in terms of geography. To address the educational needs of all the communities across the county, the district operates four attendance areas: North, Central, East, and West.

The mission of the Warren County School District is to educationally empower all students to think critically and solve problems through a rigorous curriculum that will provide them with the skills necessary to graduate and pursue a career of their interest. The vision for the future of the Warren County School District is based on what can be accomplished by the community working collaboratively toward a common goal of educational excellence.

To support the mission and achieve the future vision the WCSD applied and successfully received 21st CCLC grant. Currently, the WCSD's 21st CCLC program is comprised of three cohorts:

- Cohort 7
- Cohort 8
- Cohort 10

Cohort 7, referred to as STEM Squad, serves students in grades 2 through 5 at four elementary school sites and one charter school site. Cohort 7 is designed to serve 166 students during the school year and 100 students during the summer. The program runs for 36 weeks, 3 hours per day, Monday through Thursday during school year and 6 weeks, 4.5 hours per day, Monday through Friday during the summer. Cohort 7 serves students since 2014 and the current school year 2019-2020 is the last implementation year for this cohort. Cohort 7 and Cohort 10 will be combined effective September 30, 2020. The following school sites implement Cohort 7 program during school year:

- Eisenhower Elementary School
- Sheffield Area Elementary School
- Warren Area Elementary Center
- Youngsville Elementary School
- Tidioute Community Charter School

Cohort 8, referred to as Team STEAM, serves students in grades 6 through 8 at four middle/high school sites and one charter school site. Cohort 8 is design to serve 100 students during the school year and 30 students during the summer. The program runs for 36 weeks, 3 hours per day, Monday through Thursday during school year and 6 weeks, 4.5 hours per day, Monday through Friday during the summer. Cohort 8 serves students since 2016 and it is anticipated that Cohort 8 will run through December 2021. The following school sites implement Cohort 8 program during school year:

- Eisenhower Middle High School
- Sheffield Area Middle High School
- Youngsville Middle High School
- Beaty Warren Middle School
- Tidioute Community Charter School

Cohort 10, referred to as Discovery Crew, serves students in grades K and 1 at four elementary school sites and one charter school site starting July 1, 2019. Cohort 10 is design to serve 65 students during the school year and 40 students during the summer. The program runs for 36 weeks, 3 hours per day, Monday through Thursday during school year and 4 weeks, 4.25 hours per day, Monday through Friday during the summer. Effective September 30, 2020, Cohort 10 will absorb Cohort 7 and will serve 165 students during school year and 96 students during the summer and will run through June 30, 2024. The following school sites implement Cohort 10 program during school year:

- Eisenhower Elementary School
- Sheffield Area Elementary School
- Warren Area Elementary Center
- Youngsville Elementary School
- Tidioute Community Charter School

Summer programs for Cohort 7, Cohort 8, and Cohort 10 are all implemented at the same school site: Beaty Warren Middle School.

The program goals for each of the cohort are as following:

1. Regular participating students will meet or exceed state/local academic achievement standards in reading and math.
2. Regularly participating students will show improvement in the performance measures of school attendance, classroom performance and/or reduced disciplinary referrals.
3. Participants will demonstrate additional positive educational, social and behavioral changes.

Each cohort has various components designed to help achieve above-stated goals including, but not limited to: student-focused STEM/STEAM activities, based on high-interest, multi-faceted, project-based learning, homework help, tutoring, mentoring, etc. The program also puts on parent-focused events and education, as well as implements other components.

The WCSD has history of implementing 21st CCLC programming since 2014. During this time, the organization has established internal capacity to collect and analyze required performance data to produce mandatory federal and state reports in order to comply with the grant requirements, as well, the WCSD worked with a local evaluator to produce annual local evaluation reports for each cohort to provide required information to the funding agencies and to inform the WCSD's own practices.

The WCSD released RFP on August 7, 2019 outlining scope of work, and requirements for local external evaluator. At this time the WCSD is seeking an external evaluator to add to their current skill-set and expertise, to satisfy the requirement of the grant, and to design an evaluation to assess the quality and outcomes of the program.

The following sections of this proposal articulate FEA evaluation approach and the specific tasks to be completed for this project with associated timeline, the background and experience of the FEA evaluation team, references, and the budget narrative.

In this proposal, Foresight Evaluation Associates (FEA) provides our response to the RFP and specifies details of the proposed evaluation efforts for all three cohorts: Cohort 7, Cohort 8, and Cohort 10. The proposal includes detailed evaluation plan, budget and budget narrative, qualifications and experience, references, work history with the WCSD, and sample of work.

1.2 FEA Approach to Evaluation

The FEA evaluation team utilizes a six-step process for the decisions and activities involved in conducting an evaluation. While this evaluation process provides steps for program evaluation, the steps are not always linear and represent a more back-and-forth effort. Some steps can be completed concurrently. In some cases, it makes more sense to skip a step and come back to it. The important thing is that the steps are considered within the specific context of 21st CCLC program. When working with the WCSD, FEA will implement the following steps:

1. Engage stakeholders
2. Describe the program
3. Focus the evaluation design
4. Gather credible evidence
5. Justify conclusions
6. Ensure use and share lessons learned

Step 1: Engaging Stakeholders

During this step FEA together with WCSD 21st Century Grant Project Manager will identify intended users on the local evaluation who can directly benefit from and use the evaluation results. This individuals and groups will be invited to participate in the evaluation stakeholder workgroup of 8 to 10 members. This group will be engaged in the planning as well as in the implementation of the evaluation and will met quarterly for updates and input. At least once a year this group will meet face-to-face.

Step 2: Describing the program

A program description, including the context, will be developed to facilitate a shared understanding of the program between the program staff, FEA, and the evaluation stakeholder workgroup. Program logic model can be utilized to visually show the link between available resources (inputs), what the program is doing (activities), and what is to be achieved (intended outcomes). Any changes in the program will be reflected in the program logic model as well as program description.

Step 3: Focusing the evaluation design

Evaluation questions that are rooted in the program logic model will be used to focus evaluation design. The iterative nature of evaluation plan development is reinforced in this step.

Step 4: Gathering Credible Evidence

During this step evaluation team selects the best method(s) that answers the evaluation question. This can often involve a mixed-methods approach, which involves gathering quantitative and qualitative evidence that is seen as credible by the primary users of the evaluation. This step also helps define program evaluation implementation roles and responsibilities for program staff, evaluation staff, contractors, and stakeholders. During this step *Evaluation Plan Methods Grid* is designed to link evaluation questions, with indicators/performance measures, methods, data source, frequency of data collection, and the party responsible. This evaluation plan methods grid facilitates a shared understanding of the overall evaluation plan, and the timeline for evaluation activities.

Step 5: Justifying Conclusions

During this step the data collected is turned into meaningful, useful, and accessible information for action. FEA makes every effort to include stakeholder groups in this step. This effort is directly tied to the buy in, credibility, and acceptance of data and conclusions from the stakeholders and a wider audience. It is critical that this step includes time for interpretation and review from stakeholders (including critics) to increase transparency and validity of evaluation process and conclusions.

Step 6: Ensuring Use and Sharing Lessons Learned

FEA's planning for use of the evaluation results starts early on in the evaluation process with consideration of stakeholder involvement during Step 1 and it is built into all six steps of FEA approach to evaluation. FEA believes in evaluation that is collaborative and participatory, a process that begins in the planning phase. An intentional *Communication and Dissemination Plan* is included in the evaluation plan. This plan links target audiences, goals, communication strategies, and timetable to share the lessons learned from the evaluation. In addition to the final report, if needed, FEA produces infographics of specific findings for selected groups of stakeholders that consider the audience in terms of timing, style, tone, message source, and format.

2.0 Detailed Evaluation Plan

An evaluation plan is a written document that describes how the program will be monitored and evaluated, as well as how evaluation results will be used. The goal of this local evaluation is two-fold: 1) to provide information about the quality and effectiveness of the program so that program improvements and program decision can be made and 2) to satisfy grant funders' requirements.

Evaluation plan below specifies proposed evaluation methodology, data collection efforts, data safeguarding protocols, project deliverables and project timeline. Because all three cohorts have same goals, performance measures, and schedule, proposed evaluation plan are equally applicable to each cohort. In other words, these evaluation efforts are to be executed with each cohort in a similar manner.

2.1 Proposed Evaluation Methodology

The proposed evaluation covers three major areas: process and outcome evaluation, as well as grant compliance services. The 21st CCLC state evaluation team created required *performance indicators and multi-year program design* based on the federal performance measures defined through the Government Performance and Results Act (GPRA), Pennsylvania's program guidance, and current data and reporting elements (see Appendix A). The multi-year program design tool links program activities with performance indicators, specifies targets, identify data source and evaluation methods, as well as to grant year. These measures apply only to those students attending the program 30 or more days and address student outcomes in the following areas:

- Improvement in academic achievement standards in math and reading
- Improvement in school attendance, classroom performance, and disciplinary referrals
- Improvement in student behavior

Process measures required by the 21st CCLC state evaluation team bring focus to:

- At least one core academic area
- Enrichment and support activities in other areas

The WCSD program and local evaluation team, based on the local needs assessment, added the process measures that bring focus to:

- Program quality
- School administration satisfaction with the program
- Program staff satisfaction with the program
- Community partners satisfaction with the program
- Parents satisfaction with the program
- Students satisfaction with the program

Grant compliance addresses federal and state reporting requirements including:

- 21 APR quarterly reports
- 21 APR annual report

- PA 21st CCLC operations spreadsheet
- PA implementation survey
- PA student data spreadsheet

FEA evaluation team will use mixed evaluation methods to collect program data. Both qualitative and quantitative data will be gathered using surveys, observations, interviews, administrative data, and documents review. Subsections below provide detailed information regarding outcome and process evaluation blueprint and grant compliance.

Outcome Evaluation

Table 1 describes evaluation plan for outcomes. It links evaluation questions regarding program outcomes, with indicators/performance measures, methods, data source, frequency of data collection, and the party responsible. This evaluation plan methods grid facilitates a shared understanding of the outcomes evaluation plan, and the timeline for evaluation activities.

Table 1: Evaluation Plan Method Grid - Outcomes

	Academic achievement standards in math and reading	School attendance, classroom performance, and disciplinary referrals	Student behavior
General Evaluation Questions	Has there been in improvement in student achievement during school year? Has there been in improvement in student achievement since last year?	Has there been in improvement in student attendance since last year? Has there been in improvement in student classroom performance during school year? Has there been an improvement in student discipline referrals since last year?	Has there been an improvement in student behavior during school year?
Indicator/Performance Measure	Federal: change of half a letter grade or 5 percentage points or more. State: change in proficiency level.	Change in number of absent days. Percent of students that improved classroom performance of those that needed to improve. Change in number of disciplinary referrals.	Percent of students that improved behavior of those that needed to improve. Change in Dessa Mini scores.
Method	Grades, PSSA, Study Island	Attendance record, disciplinary referrals record, Teacher Survey.	Teacher Survey, Dessa Mini.
Data Source	WCSD administrative records. The Student Information Tracking Workbook with all student data and indicators that was developed by AIU (see AIU website for a copy of the tool http://www.aiu3.net/Level3.aspx?id=16384).	WCSD administrative records. The Student Information Tracking Workbook with all student data and indicators that was developed by AIU (see AIU website for a copy of the tool http://www.aiu3.net/Level3.aspx?id=16384). Online Teacher Survey.	Online Teacher Survey. Hard copy of Dessa Mini.
Frequency	Annually, August	Annually: April (Teacher survey) and August (student data)	Annually: April (Teacher Survey) and pre/post for Dessa Mini – October and April
Responsible Party	21 st CCLC program staff	FEA (Teacher Survey) and 21 st CCLC program staff (student data)	FEA (Teacher Survey) and 21 st CCLC program staff (Dessa Mini).

Process Evaluation and Grant Compliance

Table 2 describes evaluation plan for process and compliance. It links evaluation questions regarding the process that program staff puts in place to achieve program outcomes, with indicators/performance measures, methods, data source, frequency of data collection, and the

party responsible. This evaluation plan methods grid facilitates a shared understanding of the process evaluation plan, and the timeline for evaluation activities.

Grant compliance activities include preparation and submission all federal and state reports including.

Table 2: Evaluation Plan Method Grid – Process and Compliance

	Program Quality	Program satisfaction: administrators, staff, community partners, parents, and students	Monitoring/Grant compliance
General Evaluation Questions	What is the overall quality of the program offerings? What academic areas does the program emphasize? What enrichment and support activities does the program offer?	How satisfied are the following key stakeholder groups with the program? School administrators Program staff Community partners Parents and students	Does program fulfill all grant requirements?
Indicator/Performance Measure	PQA observation tool score. Percent of programs that emphasize at least one academic area and offer enrichment and support activities.	Percent of each stakeholder group that rate program operations and impact on students as good or excellent.	Quarterly and annual federal and state reports: 21 APR quarterly reports 21 APR annual report PA 21st CCLC operations spreadsheet PA implementation survey PA student data spreadsheet
Method	PQA observation tool: self-observation and FEA observation. Program staff input.	Online surveys for school administrators, program staff, and community partners. Hard copy survey for parents and students.	Quarterly and annual federal and state reports.
Data Source	PQA scorebook.	Online surveys for school administrators, program staff, and community partners. Hard copy survey for parents and students.	Program and school data.
Frequency	Annually: February – May (observations), May program staff input	Annually: May	Quarterly and annually.
Responsible Party	FEA (observations) 21 st CCLC program staff input/PQA self-assessment	FEA (school administrators, program staff, and community partners survey) and 21 st CCLC program staff (parents and students surveys)	FEA with data assistance from program staff.

2.2 Data Collection and Data Safeguarding

Data collection will be implemented based on the evaluation plan presented in Table 1 and Table 2. Collection of some needed information will be completed with the support for the program staff. Additional information on data collection task is presented in the section below under Task 7.

One of the key goals of the FEA evaluation team is to safeguard sensitive school, teacher, and student data to promote the protection of the confidentiality, integrity, availability, and accountability of collected data for program evaluation purposes. The data files will be protected from use by anyone other than authorized members of the program and evaluation teams. These identifiable files will be stored in a password-protected system or in a locked file cabinet. Each FEA team member will follow guidelines of the Family Educational Rights and Privacy Act (FERPA).

2.3 Work Plan and Deliverables

Below is a list of tasks that will be completed by the FEA evaluation team.

Task 1: Assemble evaluation stakeholder workgroup with the help of Grant Project Manager. The workgroup needs to include at least one person from each key stakeholder group represented, including program staff, school administration, parents, and students.

Task 2: Draft program logic model and distribute it among evaluation stakeholder workgroup. The logic model will assist in understanding the program's theory of change among various stakeholder groups.

Task 3: Meet with the evaluation stakeholder workgroup to review proposed evaluation plan and logic model draft. FEA's evaluation team will work with the WCSD program team and the evaluation stakeholder workgroup to establish a time and place when the group can meet to finalize evaluation plan and program logic model. FEA will facilitate this workgroup session.

Task 4: Finalize evaluation plan based on the input from evaluation stakeholder workgroup. Any changes that are discussed during Task 3 will be included in the final evaluation plan.

Task 5: Finalize logic model based on the input from evaluation stakeholder workgroup. Any changes that are discussed during Task 3 will be included in the final logic model.

Task 6: Update current research instruments based on the final logic model:

- Community partners, school administrators, and program staff satisfaction survey
- Parents satisfaction survey
- Student satisfaction survey
- Other (if applicable)

Task 7: Implement data collection based on the evaluation plan. Data collection will be completed with the support for the program staff. Program staff will provide a complete list of names and email addresses for all stakeholder groups. Program staff will also provide student data. In addition, program staff will distribute hard copies of the survey to parents and students at each participating school site and complete PQA self-assessments. FEA team will collect observation data, teacher survey data, and community partners, school administrators, and program staff satisfaction survey data.

- Student demographics, academic performance, school and program attendance, disciplinary referrals
- Student behavior assessment (teacher survey)
- Program observations
- Community partners, school administrators, and program staff satisfaction survey
- Parents satisfaction survey
- Student satisfaction survey

Task 8: Perform data transfer/entry and prepare all data for analysis. Data located online will be downloaded and checked for accurateness, and transferred to the statistical software. Data collected utilizing hard copies of the surveys will be entered into statistical software. Data maintained by the program staff will be used for analysis in its original form or transferred to the statistical software for additional analysis.

- Student demographics, academic performance, school and program attendance, disciplinary referrals
- Student behavior assessment (teacher survey)
- Program observations
- Community partners, school administrators, and program staff satisfaction survey
- Parents satisfaction survey
- Student satisfaction survey

Task 9: Data analysis will be performed as soon as data is available, checked for accurateness, and transferred in the appropriate format. Analysis will be performed using basic frequencies, averages, comparison of means, and other appropriate strategies.

Task 10: Review of the results of the data analysis by the evaluation stakeholder workgroup will assist evaluation team in making sense of the data and will provide additional insights and robustness to the evaluation report/findings.

Task 11: Report writing will be done based on the results of the analysis and input provided by program staff as well as evaluation stakeholder workgroup.

Task 12: Dissemination of the results will occur in accordance with required and anticipated needs of the program team. The final local evaluation report will be submitted to the state evaluator by November 30 of each year for each cohort in accordance with the grant requirement. All state/federal quarterly and annual reports will be prepared and submitted in accordance with specified timelines. In addition, infographics may be created for dissemination to the key stakeholders. FEA team is planning to attend professional evaluation conferences and present program findings to evaluation community.

2.4 Project Timeline

The timetable presented in Table 3 shows FEA estimate of when each of the tasks will be completed for each of the cohort on an annual bases and shows estimated number of hours needed to complete each task by FEA evaluation team.

Table 3: Project Timeline

Task No.	Task Description	Hours	Performed Annually											
			S	O	N	D	J	F	M	A	M	J	J	A
1	Assemble Team		★											
2	Draft Logic Model	2	★											
3	Meet with Workgroup	10	★			★			★			★		
4	Finalize Evaluation Plan	8	★											
5	Finalize Logic Model	4	★									★		
6	Update Evaluation Instruments	10		★										
7	Collect Data	100						★	★	★	★	★	★	★
8	Enter/Transfer Data	22						★	★	★	★	★	★	★
9	Analyze Data	80										★	★	
10	Discuss Preliminary Findings	10	★											★
11	Write Reports	80	★											
12	Disseminated Results	50			★	★			★			★		

3.0 Budget and Budget Narrative

Table 4 through Table 6 show annual budget for each cohort.

Each budget includes the following:

- Labor cost for completing project work for Principal Evaluator and Compliance Officer
- Labor cost for any clerical work, i.e., data entry, printing, etc.
- Labor cost for trained observers
- Supplies, i.e., PQA scoring books, paper, etc.
- Travel to and from the participating schools

Estimated annual project hours for each cohort are outlined in the Table 3. As an estimate, it takes 376 professional labor hours to complete comprehensive local evaluation as it is presented in this proposal.

Table 4: Annual Budget Cohort 7

Cohort 7	2019-2020
Personnel:	
Principal Evaluator Tatiana Bogatova, Ph.D., MBA	\$13,750
Compliance Officer—Jen Martini, MBA	\$4,000
Clerical	\$1,000
Observations	\$1,500
Labor Total	\$20,250
Operating:	
Supplies	\$500
Travel	\$500
Total	\$21,250

Table 5: Annual Budget Cohort 8

Cohort 8	2019-2020	2020-2021
Personnel:		
Principal Evaluator Tatiana Bogatova, Ph.D., MBA	\$6,600	\$6,000
Compliance Officer –Jen Martini, MBA	\$1,000	\$1,000
Clerical	\$1,000	\$500
Observations	\$1,500	\$1,500
Labor Total	\$10,100	\$9,000
Operating:		
Supplies	\$500	\$500
Travel	\$500	\$500
Total	\$11,100	\$10,000

Table 6: Annual Budget Cohort 10

Cohort 10	2019-2020	2020-2021	2021-2024
Personnel:			
Principal Evaluator Tatiana Bogatova, Ph.D., MBA	\$6,580	\$15,400	\$17,900
Compliance Officer –Jen Martini, MBA	\$2,000	\$5,000	\$8,500
Clerical	\$1,000	\$1,000	\$1,000
Observations	\$1,500	\$1,500	\$1,500
Labor Total	\$11,080	\$22,900	\$28,900
Operating:			
Supplies	\$500	\$500	\$500
Travel	\$500	\$500	\$500
Total	\$12,080	\$23,900	\$29,900

4.0 Qualifications and Experience

Foresight Evaluation Associates (FEA) is a newly formed program evaluation and consulting firm located in Erie, PA. It specializes in program evaluation, a process of gathering and interpreting critical information and providing insightful recommendations for organizations to make informed decisions, improve existing programs, demonstrate program outcomes, inform public policy, strengthen grant proposals, ensure steady funding, and keep a competitive edge in designing various programs. FEA's evaluative research methods can be applied in a variety of areas including education, public outreach and policy, human services, medical education, museums, professional development and training, etc. While organization is new, the principal of the organization and lead evaluator, Tatiana Bogatova, Ph.D., has long and in-depth experience of conducting evaluation research for over 16 years. In addition, Jennifer Martin, MBA, provides expertise in program monitoring to make sure that the program is fully compliant with grant requirements. Additional information of professional team assigned to this program is presented below.

4.1 Tatiana Bogatova, Ph.D.

Dr. Bogatova is a CEO of Foresight Evaluation Associates. Dr. Bogatova has over 16 years of experience in evaluation research and data analysis (see Appendix B for Dr. Bogatova's CV). Dr. Bogatova's educational background is in quantitative and qualitative analysis. She graduated with honors from Gannon University with MBA degree and doctoral degree in Organizational Learning and Leadership. She also holds an equivalent of Masters in Economics and Management from Sochi State University in Russia.

Dr. Bogatova has been evaluating programs funded through the 21st CCLC grant for the past six years with a great success and a proven record of positive feedback from the state monitors. She is an expert in research and evaluation methodology and teachers research methods graduate class, as well as supervises research projects for master level students at Mercyhurst University.

Dr. Bogatova was a president/CEO at KeyStone Research Corporation in Erie, PA since 2010 prior to opening an independent firm. In this capacity, Dr. Bogatova was a Principal Evaluator for the WCSD 21st CCLC program since 2014 overseeing and implementing local evaluation tasks and activities for Cohort 7 and Cohort 8.

4.2 Jennifer Martin, MBA

Ms. Martin is an independent consultant since 2003 (see Appendix B for Ms. Martin resume). Ms. Martin professional experience includes strategic planning, development, project implementation, program evaluation, economic studies, reporting, grant writing and business development for non-profit and for-profit businesses. Education services include grant development for Intermediate Units (school district systems) in Pennsylvania for U.S. Department of Education grants. She has also helped fund several school-based wellness and educational grants from foundations and local non-profits to promote K-12 programs. Ms. Martin is also a reviewer for federally funded grant proposals.

A representative sample of successful grant funded projects from the following entities include: National Institute of Health (NIH), Health Resources and Services Administration (HRSA), U.S. Department of Agriculture (USDA), Pennsylvania Department of Health (PA DOH), Komen Foundation, PA Bureau of Primary Healthcare, Housing and Urban Development (HUD),

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Department of Community and Economic Development (PA DCED), PA Department of Transportation (PA DOT), Robert Wood Johnson Foundation (RWJF), Kresge Foundation, Fannie Rippel Foundation, Federal Home Loan Bank (FHLB), Ronald McDonald House Charities, Health Alliance Charitable Fund, local foundations, private foundations and others.

Ms. Martin is very familiar with the reporting requirements and structure of the 21st CCLC grants and has been active in the development of strategies for the new 21st CCLC Annual Performance report website (21apr) to capture information regarding state-administered 21st CCLC Programs.

5.0 References

	Reference 1	Reference 2	Reference 3
Individual Name	Nicholas Price, M.Ed., Ed.S	Holly Novak	Jeremy Bloeser
Current Title	School Psychologist	Grant Administrator	Executive Director
Current Organization	Iroquois School District	Mercy Center for Women	Bayfront East Side Taskforce
Relationship	Former client and administrator of the 21 st CCLC grant at Erie' s Public School.	Former client and administrator of Art in Action, a program run by Erie Arts and Culture and funded through the Arts in Education Model Development and Dissemination Grant Program of the US Department of Education, PR/AWARD Number U351D10 0138.	Fellow member of the doctoral cohort at Gannon University.
Email address	nprice@iroquois.iu5.org	hnowak@mcwerie.org	jbloeser@besterie.org
Phone number	814-969-2261	814-860-4001	814-456-7062 ext. 4

6.0 Work History with the WCSD

Dr. Bogatova has an extensive history working with the WCSD. Dr. Bogatova was a Principal Evaluator for the WCSD 21st CCLC program since 2014 overseeing and implementing local evaluation tasks and activities for Cohort 7 and Cohort 8 while working as a president/CEO for KeyStone Research Corporation. Dr. Bogatova participated in the state monitoring visits for Cohort 7 and Cohort 8 grant and received highest marks for the local evaluation. She has a keen content knowledge and significant practical experience in the field of the 21st Century Community Learning Centers programming and positive working relationship with the WCSD 21st CCLC program team.

7.0 Sample of Work

Dr. Bogatova provided consulting services in area of capital campaigning and strategic planning to Erie Day School in Erie, PA as a private consultant. Results of this consulting service are presented in Appendix C. In addition, Dr. Bogatova was essential in providing all of the local evaluation reports for Cohort 7 and Cohort 8 that are in a possession by the WCSD.

Appendix A: Performance indicators and multi-year program design



21st Century Community Learning Centers (21st CCLC) Performance Indicators and Multi-Year Program Design

Performance Indicators for Grantees

The following performance indicators were created by the 21st CCLC state evaluation team based on federal performance measures, Pennsylvania's program guidance, and current data and reporting elements. The intent of a performance indicator is to contextualize program findings/results, challenge programs to improve, and establish accountability measures.

Performance indicators address program change and improvement, not necessarily elements that are inherent in the implementation of the program. For programs that directly serve students, performance indicators most often address student performance outcomes. Performance indicators are provided within the three state performance measures.

Directions:

1. Outcome indicators shaded in red are defined at the federal level through the Government Performance and Results Act (GPRA). All grantees will be held to the GPRA measures/targets that apply to the grade levels the program will serve.
 - a. At the federal level, improvement on report cards is defined as a positive move of half a letter grade or 5 percentage points or more. Improvement on state assessments is defined as a positive move of one or more proficiency level. Grantees may choose to examine or define change in different ways however, they will be held accountable to the federal change definition.
 - b. Calculation of performance at the federal level excludes students already achieving at the highest level. Grantee performance indicators should take this into account for non-GPRA indicators.
2. Based on your local needs assessment, select any other indicators that apply to your program. Performance indicators should represent annual change – change from the prior year to the current – not cumulative change over multiple years. For each non-GPRA indicator selected, choose a performance target based on your needs assessment. Performance targets should be reasonable, yet challenging.
3. You should choose indicators that relate to the needs of the population the program will serve AND that are likely to be influenced by direct efforts. You should be able to link

each indicator to specific activities and strategies that your program will use to address the change. A single activity may influence, and be listed with, more than one indicator. It is unlikely that a program will select all non-GPRA indicators. State evaluators recommend that an applicant select or create approximately 3-5 indicators in addition to the GPRA indicators and these indicators should be selected for the areas of greatest local need.

4. If there are areas of local interest or focus, there is a block at the end for defining local indicators and targets.
5. Complete the remaining empty columns as they apply to your grant and include it with your application.
 - a. **All indicators shaded red are required of all grantees unless the grant does not serve that population.** If an indicator shaded in red does not apply to your population (i.e. elementary indicators will not apply if your grant will only serve high school grades), enter “NA” in the activities, data sources and years columns. Add to the data sources identified as needed.
 - b. If you are not going to address an optional indicator (no shading), leave the row blank or delete it by clicking any cell in the row, selecting the Layout sub-tab under the Table Tools menu, clicking the arrow beneath the delete button, and choosing delete row.
 - c. For optional indicators, be sure to specify the performance target your grant has established. Targets should be chosen by considering current performance levels as identified during needs assessment.
 - d. Student outcome performance indicators apply only to those students attending the program 30 or more days, as defined at the federal level, except credit recovery indicators, which apply to all students participating in credit recovery activities.

Grantees should also be aware of two implementation indicators included in GPRA:

21st CCLC will offer high-quality enrichment opportunities that positively affect student outcomes such as school attendance and academic performance, and result in decreased disciplinary actions or other adverse behaviors.

Indicator 2.1: The percentage of 21st CCLC centers reporting emphasis in at least one core academic area. Target: 100% of centers.

Indicator 2.2: The percentage 21st CCLC centers offering enrichment and support activities in other areas. Target: 100% of centers.

**21st CENTURY COMMUNITY LEARNING CENTERS:
MULTI -YEAR PROGRAM DESIGN AND PERFORMANCE**

Applicant Agency: Warren County School District

Performance Measure 1: Students regularly participating in the program will meet or exceed state and local academic achievement standards in reading and math.				
Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of elementary 21st CCLC regular program participants whose mathematics grades improved from fall to spring (GPRA 1.1)	48.5%	Study Island and Successmaker/ Educational Activities on iPads/Laptops (ex. Mathmateer)/Homework Help/Junk Drawer Robotics/Educational Activities - math flash cards, math board games (ex. Times & Division Bingo)/Arts Enrichment Activities - ex. photography, pizza art	Math report card grades; fall and spring; student program attendance data; student grade levels	1,2,3
The percentage of middle or high school 21st CCLC regular program participants whose mathematics grades improved from fall to spring (GPRA 1.2)	48.5%	N/A	Math report card grades; fall and spring; student program attendance data; student grade levels	
The percentage of all 21st CCLC regular program participants whose mathematics grades improved from fall to spring (GPRA 1.3)	48.5%	Study Island and Successmaker/ Educational Activities on iPads/Laptops (ex. Mathmateer)/Homework Help/Junk Drawer Robotics/Educational Activities - math flash cards, math board games (ex. Times & Division Bingo)/Arts Enrichment Activities - ex. photography, pizza art	Math report card grades; fall and spring; student program attendance data	1,2,3

Performance Measure 1: Students regularly participating in the program will meet or exceed state and local academic achievement standards in reading and math.					
Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined	
The percentage of elementary 21st CCLC regular program participants whose reading/English grades improved from fall to spring (GPRA 1.4)	48.5%	Study Island and Successmaker/ Educational Activities on iPads/Laptops (ex. Poetry Creator)/Homework Help/ Educational Activities - ex. conversation cubes, reading comprehension cards/Art Enrichment Activities - ex. write and perform a play	Reading/English/language arts report card grades; fall and spring; student program attendance data; student grade levels	1,2,3	
The percentage of middle or high school 21st CCLC regular program participants whose reading/English grades improved from fall to spring (GPRA 1.5)	48.5%	N/A	Reading/English/language arts report card grades; fall and spring; student program attendance data; student grade levels		
The percentage of all 21st CCLC regular program participants whose reading/English grades improved from fall to spring. (GPRA 1.6)	70%	Study Island and Successmaker/ Educational Activities on iPads/Laptops (ex. Poetry Creator)/Homework Help/ Educational Activities - ex. conversation cubes, reading comprehension cards/Art Enrichment Activities - ex. write and perform a play	Reading/English/language arts report card grades; fall and spring; student program attendance data	1,2,3	
The percentage of elementary 21st CCLC regular program participants who improve from not proficient to proficient or above in reading on state assessments (PSSA/PASA). (GPRA 1.7)	45%	Study Island and Successmaker/ Educational Activities on iPads/Laptops (ex. Poetry Creator)/Homework Help/ Educational Activities - ex. conversation cubes, reading comprehension cards/Art Enrichment Activities - ex. write and perform a play	Reading state assessment data; student program attendance data; student grade levels	1,2,3	

Performance Measure 1: Students regularly participating in the program will meet or exceed state and local academic achievement standards in reading and math.				
Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of middle/high school 21st CCLC regular program participants who improve from not proficient to proficient or above in mathematics on state assessments (PSSA, PASA, or Keystone Exam). (GPRA 1.8)	25%	N/A	Math state assessment data; student program attendance data; student grade levels	
The percentage of regularly attending students who improve their state reading assessment performance level from the prior year to the current year			Reading state assessment data; student program attendance data	
The percentage of regularly attending students who improve their state math assessment performance level from the prior year to the current year			Math state assessment data; student program attendance data	
The percentage of regularly attending students improving in reading based on pre/post assessments using Study Island/Dibels	20%	Study Island and Successmaker/ Educational Activities on iPads/Laptops (ex. Poetry Creator)/Homework Help/ Educational Activities - ex. conversation cubes, reading comprehension cards/Art Enrichment Activities - ex. write and perform a play	Local pre/post reading assessments Study Island/Dibels student program attendance data	1,2,3

Performance Measure 1: Students regularly participating in the program will meet or exceed state and local academic achievement standards in reading and math.				
Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of regularly attending students improving in math based on pre/post assessments using Study Island	20%	Study Island and Successmaker/ Educational Activities on iPads/Laptops (ex. Mathmateer)/Homework Help/Junk Drawer Robotics/Educational Activities - math flash cards, math board games (ex. Times & Division Bingo)/Arts Enrichment Activities - ex. photography, pizza art	Local pre/post reading assessments Study Island student program attendance data	1,2,3
The percentage of regularly attending students improving their academic performance as measured by the Teacher Survey			Teacher Survey; student program attendance data	

Performance Measure 2: Students regularly participating in the program will show improvement in the performance measures of school attendance, classroom performance and/or reduced disciplinary referrals.				
Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of elementary 21st CCLC regular program participants with teacher-reported improvement in homework completion and class participation (of students needing to improve). (GPRA 1.9)	90%	Study Island and Successmaker/ Homework Help/Educational Activities - flash cards, board games, conversation cubes, etc./Arts Enrichment Activities/Physical Education Activities - teamwork, etc..	Teacher Survey; student program attendance data; student grade levels	
The percentage of middle and high school 21st CCLC program participants with teacher-reported improvement in homework completion and class participation (of students needing to improve) (GPRA 1.10)	93%	N/A	Teacher Survey; student program attendance data; student grade levels	
The percentage of all 21st CCLC regular program participants with teacher-reported improvement in homework completion and class participation (of students needing to improve) (GPRA 1.11)	77%	Study Island and Successmaker/ Homework Help/Educational Activities - flash cards, board games, conversation cubes, etc./Arts Enrichment Activities/Physical Education Activities - teamwork, etc..	Teacher Survey; student program attendance data; student grade levels	
The percentage of regularly attending students who improve their school attendance by reducing their number of days absent from the prior year to the current year			Prior year and current year school attendance data (# of days absent); student program attendance data	

Performance Measure 2: Students regularly participating in the program will show improvement in the performance measures of school attendance, classroom performance and/or reduced disciplinary referrals.				
Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of regularly attending students who improve their school attendance by reducing their number of days tardy from the prior year to the current year			Prior year and current year school attendance data (# of days tardy); student program attendance data	
The percentage of regularly attending students who improve their school behavior by reducing their number of discipline incidents from the prior year to the current year			Prior year and current year school discipline data (# of discipline incidents); student program attendance data	
The percentage of regularly attending students who improve their school behavior by reducing their number of days suspended from the prior year to the current year			Prior year and current year school discipline data (# of days suspended); student program attendance data	
The percentage of regularly attending students improving their class attendance as measured by the Teacher Survey			Teacher Survey; student program attendance data	

Performance Measure 2: Students regularly participating in the program will show improvement in the performance measures of school attendance, classroom performance and/or reduced disciplinary referrals.				
Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of regularly attending students improving their class participation as measured by the Teacher Survey			Teacher Survey; student program attendance data	
The percentage of regularly attending students improving their class attentiveness as measured by the Teacher Survey			Teacher Survey; student program attendance data	

Performance Measure 3: Participants in 21st Century programs will demonstrate additional positive educational, social, and behavioral changes.				
Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of elementary 21st CCLC participants with teacher-reported improvements in student behavior (of students needing to improve). (GPRA 1.12)	75%	Character education provided by Beacon Light. Physical Education - teamwork and cooperation	Teacher Survey; student program attendance data	1,2,3
The percentage of middle and high school 21st CCLC participants with teacher-reported improvements in student behavior (of students needing to improve). (GPRA 1.13)	75%	N/A	Teacher Survey; student program attendance data	
The percentage of all 21st CCLC participants with teacher-reported improvements in student behavior (of students needing to improve) (GPRA 1.14)	75%	Character education provided by Beacon Light. Physical Education - teamwork and cooperation	Teacher Survey; student program attendance data	1,2,3
The percentage of regularly attending students improving their volunteering in class as measured by the Teacher Survey			Teacher Survey; student program attendance data	

Performance Measure 3: Participants in 21st Century programs will demonstrate additional positive educational, social, and behavioral changes.				
Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of regularly attending students improving their motivation to learn as measured by the Teacher Survey			Teacher Survey; student program attendance data	
The percentage of regularly attending students improving their ability to get along well with others as measured by the Teacher Survey			Teacher Survey; student program attendance data	
The percentage of students successfully recovering one or more credits/courses (of those participating in credit recovery activities)			Student participation records (#/list of students participating in credit or course recovery activities; #/list of students recovering credits/courses; list of courses recovered by each student	

Performance Measure 3: Participants in 21st Century programs will demonstrate additional positive educational, social, and behavioral changes.				
Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of students promoted to the next grade or graduating at the end of the school year.			Graduation/promotion or grade level enrollment records for current year and subsequent year	

Locally-defined Indicators	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined

Locally-defined Indicators	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of PQA domain scores for safe environment, supportive environment, interaction, and engagement that have a mean score of 3 or higher.	70%	Professional development for staff, advisory group meetings, consultation with evaluators	Form A PQA scores at the end of each summer and school year.	1,2,3
The percentage of PQA organizational cores for: program's youth centered policies and practices, high expectations for youth and staff, and access that have a mean score of 3.5 or higher.	70%	Professional development for staff, advisory group meetings, consultation with evaluators	Form A PQA scores at the end of each summer and school year.	
The percentage of school administrative staff who rate the Warren County S.D. 21st CCLC Program operations and impact on students as good or excellent.	80%	Meetings and communication with school administrative staff	School administrative staff survey at the end of each summer and school year	1,2,3
The percentage of program staff who rate the Warren County S.D. 21st CCLC Program operations and impact on students as good or excellent.	80%	Team meetings, professional development for staff	Program staff survey at the end of each summer and school year	
The percentage of parents who rate the Warren County S.D. 21st CCLC Program operations and impact on their child's school-related performance as good or excellent.	80%	Parent engagement activities, communication with parents	Parent survey at the end of each summer and school year	1,2,3
The percentage of students who rate the Warren County S.D. 21st CCLC Program operations and impact on their own school-related performance as good or excellent.	80%	Student program activities	Student survey at the end of each summer and school year	



21st Century Community Learning Centers (21st CCLC) Performance Indicators and Multi-Year Program Design

Performance Indicators for Grantees

The following performance indicators were created by the 21st CCLC state evaluation team based on federal performance measures, Pennsylvania's program guidance, and current data and reporting elements. The intent of a performance indicator is to contextualize program findings/results, challenge programs to improve, and establish accountability measures.

Performance indicators address program change and improvement, not necessarily elements that are inherent in the implementation of the program. For programs that directly serve students, performance indicators most often address student performance outcomes. Performance indicators are provided within the three state performance measures.

Directions:

1. Outcome indicators shaded in red are defined at the federal level through the Government Performance and Results Act (GPRA). All grantees will be held to the GPRA measures/targets that apply to the grade levels the program will serve.
 - a. At the federal level, improvement on report cards is defined as a positive move of half a letter grade or 5 percentage points or more. Improvement on state assessments is defined as a positive move of one or more proficiency level. Grantees may choose to examine or define change in different ways however, they will be held accountable to the federal change definition.
 - b. Calculation of performance at the federal level excludes students already achieving at the highest level. Grantee performance indicators should take this into account for non-GPRA indicators.
2. Based on your local needs assessment, select any other indicators that apply to your program. Performance indicators should represent annual change – change from the prior year to the current – not cumulative change over multiple years. For each non-GPRA indicator selected, choose a performance target based on your needs assessment. Performance targets should be reasonable, yet challenging.
3. You should choose indicators that relate to the needs of the population the program will serve AND that are likely to be influenced by direct efforts. You should be able to link each indicator to specific activities and strategies that your program will use to address the change. A single activity may influence, and be listed with, more than one indicator. It is unlikely that a program will select all non-GPRA indicators. State evaluators recommend that an applicant select or create approximately 3-5 indicators in addition to

the GPRA indicators and these indicators should be selected for the areas of greatest local need.

4. If there are areas of local interest or focus, there is a block at the end for defining local indicators and targets.
5. Complete the remaining empty columns as they apply to your grant and include it with your application.
 - a. **All indicators shaded red are required of all grantees unless the grant does not serve that population:** If an indicator shaded in red does not apply to your population (i.e. elementary indicators will not apply if your grant will only serve high school grades), enter "NA" in the activities, data sources and years columns. Add to the data sources identified as needed.
 - b. If you are not going to address an optional indicator (no shading), leave the row blank or delete it by clicking any cell in the row, selecting the Layout sub-tab under the Table Tools menu, clicking the arrow beneath the delete button, and choosing delete row.
 - c. For optional indicators, be sure to specify the performance target your grant has established. Targets should be chosen by considering current performance levels as identified during needs assessment.
 - d. Student outcome performance indicators apply only to those students attending the program 30 or more days, as defined at the federal level, except credit recovery indicators, which apply to all students participating in credit recovery activities.

Grantees should also be aware of two implementation indicators included in GPRA:

21st CCLC will offer high-quality enrichment opportunities that positively affect student outcomes such as school attendance and academic performance, and result in decreased disciplinary actions or other adverse behaviors.

Indicator 2.1: The percentage of 21st CCLC centers reporting emphasis in at least one core academic area. Target: 100% of centers.

Indicator 2.2: The percentage 21st CCLC centers offering enrichment and support activities in other areas. Target: 100% of centers.

**21st CENTURY COMMUNITY LEARNING CENTERS:
MULTI-YEAR PROGRAM DESIGN AND PERFORMANCE**

Applicant Agency:

Performance Measure 1: Students regularly participating in the program will meet or exceed state and local academic achievement standards in reading and math.				
Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of elementary 21st CCLC regular program participants whose mathematics grades improved from fall to spring (GPRA 1.1)	48.5%		Math report card grades; fall and spring; student program attendance data; student grade levels	1, 2, 3
The percentage of middle or high school 21st CCLC regular program participants whose mathematics grades improved from fall to spring (GPRA 1.2)	48.5%	Study Island/Successmaker/ Khan Academy/Computer Coding	Math report card grades; fall and spring; student program attendance data; student grade levels	1, 2, 3
The percentage of all 21st CCLC regular program participants whose mathematics grades improved from fall to spring (GPRA 1.3)	48.5%	Study Island/Successmaker/ Khan Academy/Computer Coding	Math report card grades; fall and spring; student program attendance data	1, 2, 3
The percentage of elementary 21st CCLC regular program participants whose reading/English grades improved from fall to spring (GPRA 1.4)	48.5%		Reading/English/language arts report card grades; fall and spring; student program attendance data; student grade levels	1, 2, 3

Performance Measure 1: Students regularly participating in the program will meet or exceed state and local academic achievement standards in reading and math.				
Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of middle or high school 21st CCLC regular program participants whose reading/English grades improved from fall to spring (GPRA 1.5)	48.5%	Study Island/Successmaker/Journaling/Khan Academy/Theater	Reading/English/language arts report card grades; fall and spring; student program attendance data; student grade levels	1, 2, 3
The percentage of all 21st CCLC regular program participants whose reading/English grades improved from fall to spring. (GPRA 1.6)	70%	Study Island/Successmaker/Journaling/Khan Academy/	Reading/English/language arts report card grades; fall and spring; student program attendance data	1, 2, 3
The percentage of elementary 21st CCLC regular program participants who improve from not proficient to proficient or above in reading on state assessments (PSSA/PASA). (GPRA 1.7)	45%		Reading state assessment data; student program attendance data; student grade levels	1, 2, 3
The percentage of middle/high school 21st CCLC regular program participants who improve from not proficient to proficient or above in mathematics on state assessments (PSSA, PASA, or Keystone Exam). (GPRA 1.8)	25%	Study Island/Successmaker/Khan Academy/Computer Coding	Math state assessment data; student program attendance data; student grade levels	1, 2, 3
The percentage of regularly attending students who improve their state reading assessment performance level from the prior year to the current year			Reading state assessment data; student program attendance data	

Performance Measure 1: Students regularly participating in the program will meet or exceed state and local academic achievement standards in reading and math.				
Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of regularly attending students who improve their state math assessment performance level from the prior year to the current year			Math state assessment data; student program attendance data	
The percentage of regularly attending students improving in reading based on pre/post assessments using [insert assessment name]			Local pre/post reading assessments [applicant should specify]; student program attendance data	
The percentage of regularly attending students improving in math based on pre/post assessments using [insert assessment name]			Local pre/post reading assessments [applicant should specify]; student program attendance data	
The percentage of regularly attending students improving their academic performance as measured by the Teacher Survey			Teacher Survey; student program attendance data	

Performance Measure 2: Students regularly participating in the program will show improvement in the performance measures of school attendance, classroom performance and/or reduced disciplinary referrals.				
Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of elementary 21st CCLC regular program participants with teacher-reported improvement in homework completion and class participation (of students needing to improve). (GPRA 1.9)	90%		Teacher Survey; student program attendance data; student grade levels	1, 2, 3
The percentage of middle and high school 21st CCLC program participants with teacher-reported improvement in homework completion and class participation (of students needing to improve) (GPRA 1.10)	93%	Study Island/Successmaker/ Homework Assistance/Academic Enrichment Activities	Teacher Survey; student program attendance data; student grade levels	1, 2, 3
The percentage of all 21st CCLC regular program participants with teacher-reported improvement in homework completion and class participation (of students needing to improve) (GPRA 1.11)	77%	Study Island/Successmaker/ Homework Assistance/Academic Enrichment Activities	Teacher Survey; student program attendance data; student grade levels	1, 2, 3
The percentage of regularly attending students who improve their school attendance by reducing their number of days absent from the prior year to the current year			Prior year and current year school attendance data (# of days absent); student program attendance data	
The percentage of regularly attending students who improve their school attendance by reducing their number of days tardy from the prior year to the current year			Prior year and current year school attendance data (# of days tardy); student program attendance data	

Performance Measure 2: Students regularly participating in the program will show improvement in the performance measures of school attendance, classroom performance and/or reduced disciplinary referrals.				
Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of regularly attending students who improve their school behavior by reducing their number of discipline incidents from the prior year to the current year			Prior year and current year school discipline data (# of discipline incidents); student program attendance data	
The percentage of regularly attending students who improve their school behavior by reducing their number of days suspended from the prior year to the current year			Prior year and current year school discipline data (# of days suspended); student program attendance data	
The percentage of regularly attending students improving their class attendance as measured by the Teacher Survey			Teacher Survey; student program attendance data	
The percentage of regularly attending students improving their class participation as measured by the Teacher Survey			Teacher Survey; student program attendance data	
The percentage of regularly attending students improving their class attentiveness as measured by the Teacher Survey			Teacher Survey; student program attendance data	

Performance Measure 3: Participants in 21st Century programs will demonstrate additional positive educational, social, and behavioral changes.				
Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of elementary 21st CCLC participants with teacher-reported improvements in student behavior (of students needing to improve). (GPRA 1.12)	75%		Teacher Survey; student program attendance data	1, 2, 3
The percentage of middle and high school 21st CCLC participants with teacher-reported improvements in student behavior (of students needing to improve). (GPRA 1.13)	75%	Character education/Physical Education - teamwork/cooperation	Teacher Survey; student program attendance data	1, 2, 3
The percentage of all 21st CCLC participants with teacher-reported improvements in student behavior (of students needing to improve) (GPRA 1.14)	75%	Character education/Physical Education - teamwork/cooperation	Teacher Survey; student program attendance data	1, 2, 3
The percentage of regularly attending students improving their volunteering in class as measured by the Teacher Survey			Teacher Survey; student program attendance data	
The percentage of regularly attending students improving their motivation to learn as measured by the Teacher Survey			Teacher Survey; student program attendance data	
The percentage of regularly attending students improving their ability to get along well with others as measured by the Teacher Survey			Teacher Survey; student program attendance data	

Performance Measure 3: Participants in 21st Century programs will demonstrate additional positive educational, social, and behavioral changes.				
Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of students successfully recovering one or more credits/courses (of those participating in credit recovery activities)			Student participation records (#/list of students participating in credit or course recovery activities; #/list of students recovering credits/courses; list of courses recovered by each student	
The percentage of students promoted to the next grade or graduating at the end of the school year.			Graduation/promotion or grade level enrollment records for current year and subsequent year	

Locally-defined Indicators	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined



21st Century Community Learning Centers (21st CCLC) Performance Indicators and Multi-Year Program Design

Performance Indicators for Grantees

The following performance indicators were created by the 21st CCLC state evaluation team based on federal performance measures, Pennsylvania's program guidance, and current data and reporting elements. The intent of a performance indicator is to contextualize program findings/results, challenge programs to improve, and establish accountability measures.

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Directions:

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 - a. At the federal level, improvement on report cards is defined as a positive move of half a letter grade or 5 percentage points or more. Improvement on state assessments is defined as a positive move of one or more proficiency level. Grantees may choose to examine or define change in different ways however, they will be held accountable to the federal change definition.
 - b. Calculation of performance at the federal level excludes students already achieving at the highest level. Grantee performance indicators should take this into account for non-GPRA indicators.
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4. If there are areas of local interest or focus, there is a block at the end for defining local indicators and targets.
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 - a. **All indicators shaded red are required of all grantees unless the grant does not serve that population.** If an indicator shaded in red does not apply to your population (i.e. elementary indicators will not apply if your grant will only serve high school grades), enter "NA" in the activities, data sources and years columns. Add to the data sources identified as needed.
 - b. If you are not going to address an optional indicator (no shading), leave the row blank or delete it by clicking any cell in the row, selecting the Layout sub-tab under the Table Tools menu, clicking the arrow beneath the delete button, and choosing delete row.
 - c. For optional indicators, be sure to specify the performance target your grant has established. Targets should be chosen by considering current performance levels as identified during needs assessment.
 - d. Student outcome performance indicators apply only to those students attending the program 30 or more days, as defined at the federal level, except credit recovery indicators, which apply to all students participating in credit recovery activities.

Grantees should also be aware of two implementation indicators included in GPRA:

21st CCLC will offer high-quality enrichment opportunities that positively affect student outcomes such as school attendance and academic performance, and result in decreased disciplinary actions or other adverse behaviors.

Indicator 2.1: The percentage of 21st CCLC centers reporting emphasis in at least one core academic area. Target: 100% of centers.

Indicator 2.2: The percentage 21st CCLC centers offering enrichment and support activities in other areas. Target: 100% of centers.

**21st CENTURY COMMUNITY LEARNING CENTERS:
MULTI -YEAR PROGRAM DESIGN AND PERFORMANCE**

Applicant Agency:

Performance Measure 1: Students regularly participating in the program will meet or exceed state and local academic achievement standards in reading and math.				
Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of elementary 21st CCLC regular program participants whose mathematics grades improved from fall to spring (GPRA 1.1)	48.5%	Academic Enrichment, Literacy Activities, Math Activities, STEM Activities	Math report card grades; fall and spring; student program attendance data; student grade levels	1,2,3
The percentage of middle or high school 21st CCLC regular program participants whose mathematics grades improved from fall to spring (GPRA 1.2)	48.5%	NA	Math report card grades; fall and spring; student program attendance data; student grade levels	1,2,3
The percentage of all 21st CCLC regular program participants whose mathematics grades improved from fall to spring (GPRA 1.3)	48.5%	Academic Enrichment, Literacy Activities, Math Activities, STEM Activities	Math report card grades; fall and spring; student program attendance data	1,2,3
The percentage of elementary 21st CCLC regular program participants whose reading/English grades improved from fall to spring (GPRA 1.4)	48.5%	Academic Enrichment, Literacy Activities, Math Activities, STEM Activities	Reading/English/language arts report card grades; fall and spring; student program attendance data; student grade levels	1, 2, 3
The percentage of middle or high school 21st CCLC regular program participants whose reading/English grades improved from fall to spring (GPRA 1.5)	48.5%	NA	Reading/English/language arts report card grades; fall and spring; student program attendance data; student grade levels	1, 2, 3

Performance Measure 1: Students regularly participating in the program will meet or exceed state and local academic achievement standards in reading and math.				
Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of all 21st CCLC regular program participants whose reading/English grades improved from fall to spring. (GPRA 1.6)	70%	Academic Enrichment, Literacy Activities, Math Activities, STEM Activities	Reading/English/language arts report card grades; fall and spring; student program attendance data	1, 2, 3
The percentage of elementary 21st CCLC regular program participants who improve from not proficient to proficient or above in reading on state assessments (PSSA/PASA). (GPRA 1.7)	45%	NA	Reading state assessment data; student program attendance data; student grade levels	1, 2, 3
The percentage of middle/high school 21st CCLC regular program participants who improve from not proficient to proficient or above in mathematics on state assessments (PSSA, PASA, or Keystone Exam). (GPRA 1.8)	25%	NA	Math state assessment data; student program attendance data; student grade levels	1, 2, 3
The percentage of regularly attending students who improve their state reading assessment performance level from the prior year to the current year			Reading state assessment data; student program attendance data	
The percentage of regularly attending students who improve their state math assessment performance level from the prior year to the current year			Math state assessment data; student program attendance data	
The percentage of regularly attending students improving in reading based on pre/post assessments using [insert assessment name]	80%	Wonderworks Academic Enrichment Learning A to Z Assessment - Acadience Reading	Local pre/post reading assessments [applicant should specify]; student program attendance data	

Performance Measure 1: Students regularly participating in the program will meet or exceed state and local academic achievement standards in reading and math.				
Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of regularly attending students improving in math based on pre/post assessments using [insert assessment name]	80%	Eureka Math Academic Enrichment ST Math STEM Assessment - Acadience Math	Local pre/post reading assessments [applicant should specify]; student program attendance data	
The percentage of regularly attending students improving their academic performance as measured by the Teacher Survey			Teacher Survey; student program attendance data	

Performance Measure 2: Students regularly participating in the program will show improvement in the performance measures of school attendance, classroom performance and/or reduced disciplinary referrals.				
Performance Indicator	Target (%)	Activities	Data Source(s) and Evaluation Methods	Grant Year
		Include those activities specifically chosen to influence the area addressed by the performance indicator	List all data sources used to examine this indicator	Indicate which grant years this indicator will be examined
The percentage of elementary 21st CCLC regular program participants with teacher-reported improvement in homework completion and class participation (of students needing to improve). (GPRA 1.9)	90%	Homework Time, Academic Enrichment	Teacher Survey; student program attendance data; student grade levels	1, 2, 3

Performance Measure 2: Students regularly participating in the program will show improvement in the performance measures of school attendance, classroom performance and/or reduced disciplinary referrals.				
Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of middle and high school 21st CCLC program participants with teacher-reported improvement in homework completion and class participation (of students needing to improve) (GPRA 1.10)	93%	NA	Teacher Survey; student program attendance data; student grade levels	1, 2, 3
The percentage of all 21st CCLC regular program participants with teacher-reported improvement in homework completion and class participation (of students needing to improve) (GPRA 1.11)	77%	NA	Teacher Survey; student program attendance data; student grade levels	1, 2, 3
The percentage of regularly attending students who improve their school attendance by reducing their number of days absent from the prior year to the current year			Prior year and current year school attendance data (# of days absent); student program attendance data	
The percentage of regularly attending students who improve their school attendance by reducing their number of days tardy from the prior year to the current year			Prior year and current year school attendance data (# of days tardy); student program attendance data	
The percentage of regularly attending students who improve their school behavior by reducing their number of discipline incidents from the prior year to the current year			Prior year and current year school discipline data (# of discipline incidents); student program attendance data	

Performance Measure 2: Students regularly participating in the program will show improvement in the performance measures of school attendance, classroom performance and/or reduced disciplinary referrals.				
Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of regularly attending students who improve their school behavior by reducing their number of days suspended from the prior year to the current year			Prior year and current year school discipline data (# of days suspended); student program attendance data	
The percentage of regularly attending students improving their class attendance as measured by the Teacher Survey			Teacher Survey; student program attendance data	
The percentage of regularly attending students improving their class participation as measured by the Teacher Survey			Teacher Survey; student program attendance data	
The percentage of regularly attending students improving their class attentiveness as measured by the Teacher Survey			Teacher Survey; student program attendance data	

Performance Measure 3: Participants in 21st Century programs will demonstrate additional positive educational, social, and behavioral changes.

Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of elementary 21st CCLC participants with teacher-reported improvements in student behavior (of students needing to improve). (GPRA 1.12)	75%	SEL/Character Education provided by Beacon Light	Teacher Survey; student program attendance data	1, 2, 3
The percentage of middle and high school 21st CCLC participants with teacher-reported improvements in student behavior (of students needing to improve). (GPRA 1.13)	75%	NA	Teacher Survey; student program attendance data	1, 2, 3
The percentage of all 21st CCLC participants with teacher-reported improvements in student behavior (of students needing to improve) (GPRA 1.14)	75%	SEL/Character Education provided by Beacon Light	Teacher Survey; student program attendance data	1, 2, 3
The percentage of regularly attending students improving their volunteering in class as measured by the Teacher Survey			Teacher Survey; student program attendance data	
The percentage of regularly attending students improving their motivation to learn as measured by the Teacher Survey			Teacher Survey; student program attendance data	
The percentage of regularly attending students improving their ability to get along well with others as measured by the Teacher Survey			Teacher Survey; student program attendance data	

Performance Measure 3: Participants in 21st Century programs will demonstrate additional positive educational, social, and behavioral changes.				
Performance Indicator	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of students successfully recovering one or more credits/courses (of those participating in credit recovery activities)			Student participation records (#/list of students participating in credit or course recovery activities; #/list of students recovering credits/courses; list of courses recovered by each student	
The percentage of students promoted to the next grade or graduating at the end of the school year.			Graduation/promotion or grade level enrollment records for current year and subsequent year	

Locally-defined Indicators	Target (%)	Activities Include those activities specifically chosen to influence the area addressed by the performance indicator	Data Source(s) and Evaluation Methods List all data sources used to examine this indicator	Grant Year (1, 2, 3) Indicate which grant years this indicator will be examined
The percentage of PQA domain scores for safe environment, supportive environment, interaction, and engagement that have a mean score of 3 or higher.	70%	Professional development for staff consultation with evaluators advisory focus group meetings	Form A PQA scores at the end of each summer and school year	1,2,3

Appendix B: Tatiana Bogatova, Ph.D. – CV and Jennifer Martin, MBA – Resume



Tatiana Bogatova

3304 Berkley Rd, Erie, PA 16506 ~ Phone: 814-835-8054 ~ E-Mail: tatiana.bogatova@foresighteval.com

Academic Background

Gannon University, Erie, Pennsylvania, 2007-2017, Ph.D. Organizational Learning and Leadership
Doctoral Dissertation: Grounded Theory of Adoption of Sustainability Thinking and Practices by Organizations

Gannon University, Erie, Pennsylvania, 1996-2002, MBA

Sochi State University, Sochi, Russia, 1994-95, M.A. Economics

Sochi State University, Sochi, Russia, 1990-94, B.S. Management

Professional Certifications

Lean Operations—Six Sigma Green Belt Certification, Manufacturing Association of NW Pennsylvania, Erie, Pennsylvania, 2007

Certified Professional Supervisor (CPS), Manufacture and Business Association of NW Pennsylvania, Erie, Pennsylvania, October 7, 2008.

Certified Financial Social Work Educator/Coach, Center for Financial Social Work, Asheville, North Carolina, May 21, 2012

SBA Pittsburgh District Office Emerging Leaders Class of 2018, Pittsburgh, PA April – November, 2018

Administrative Experience:

CEO, Foresight Evaluation Associates, Erie, PA 2019 – present

Lead research and evaluation efforts, develop and execute research designs to support clients' inquiry efforts; oversee, implement activities directed to building partnerships and markets, provide organizational oversight on strategy development, human capital, finance, and future organizational development.

President/CEO, Keystone Research Corporation, Erie, PA, 2010-2019

Lead research and evaluation efforts, develop and execute research designs to support clients' inquiry efforts; oversee, implement activities directed to building partnerships and markets, provide organizational oversight on strategy development, human capital, finance, and future organizational development.

Director of Business Development, Keystone Research Corporation, Erie, PA, 2007-2010

Lead product and business development efforts, develop and execute framework for evaluating existing and potential areas of strategic priorities, oversee, implement activities directed to build partnerships and content area expertise.

Professional Experience – Organizational Consultancy, Research, Education:

Adjunct Instructor, Mercyhurst University, Erie, PA, 2017 – present

Teach master level Research Methods 504 course in the Organization Leadership Master Program.

Co-Investigator/Applied Researcher, KeyStone Research Corporation, Erie, PA, 2007-present

Conceptualize and design research projects and process improvement implementations to improve the programming on human service organizations. Oversee and carry out day-to-day tasks associated with the process improvement implementations and research projects.

Marketing Research Manager, KeyStone Research Corporation, Erie, PA, 2005-2007

Assistant Researcher, KeyStone Research Corporation, Erie, PA, 2003-2005

International Logistics Manager, Logistics Plus, Erie PA, 2000-2003

Club Cleopatra/Lobby Bar Manager, Radisson/SAS Lazurnaya, Sochi, Russia, 1993-1996

Current Projects:

- Evaluation of 21st Century CCCL afterschool program: Cohort 10, Warren County School District, Warren, PA, 2019-2024
- Evaluation of 21st Century CCCL afterschool program: Cohort 10, Union City Area School District, Union City, PA, 2019-2024
- Evaluation of Texas Farm Fresh Jump with Jill Live Tour, Jump with Jill, Pittsburgh, PA, 2019-2020

Projects Completed:

- Evaluation of Home4Good program, St. Martin Center, Erie, PA 2019
- Evaluation of Gearing Up Afterschool program: Cohort 7, School District of City of Erie, Erie, PA, 2014-2019
- Evaluation of Carpe Diem Academy afterschool program: Cohort 7, Mercyhurst University, Erie, PA, 2014-2019
- Evaluation of 21st Century CCCL afterschool program: Cohort 7 & 8, Warren County School District, Warren, PA, 2014-2019
- Evaluation of Kids As Curators, a grant to the Erie Art Museum from the Institute for Museum and Library Service, Museums for American Grant program, FY 2016-2019
- Office of Children Youth and Families Data Services for Hornby Zeller Associates, Inc., April 2016-June 2019
- Evaluation of Summer Jobs and More (JAM) program, Erie County, PA, 2015-2018
- Residents Meetings Facilitation, Eastside Grassroots Coalition, Erie, PA, 2018
- Evaluation of Financial Literacy Counseling Program, St. Martin Center, Catholic Charities, and International Institute, Erie, PA, 2014-2018
- ETO Expansion for SafeNet, Erie, PA, 2013-2017
- Resident Safety and Services Survey Research, Housing Authority of City of Erie, Erie, PA, 2010-

2018

- Evaluation of Middle Gears Afterschool Ed-venture program, School District of City of Erie, Erie, PA, 2012-2016
- Evaluation of Art in Action, Erie Arts & Culture, Erie, PA, July 2010-March 2015.
- Evaluation of Financial Social Work, Pilot 1 and 2, United Way, Community Shelter Services, SafeNet, Erie DAWN, Stairways Behavioral Health, Erie, PA, 2011-2014
- Evaluation of Financial Education Counseling Program, GECAC, Erie, PA 2014-2015
- Public Outreach and Data Collection for Destination Erie: A Regional Vision, Destination Erie Consortium, Erie, PA 2013-2015
- Evaluation of Rotary Symposium on Ethics, Rotary, Erie, PA, 2012-2016
- Marketing Study: Rowing in Erie, The Nonprofit Partnership & Collegiate Academy Crew, 2014
- Capital Campaign Focus Groups for Erie Day School, Erie, PA, 2013
- Evaluation of Out of the Box Program, Erie Arts & Cultures, Erie, PA, 2013
- Evaluation of ReTool Erie, Erie Community Foundation and The Nonprofit Partnership, Erie, PA, January 2010-December 2011.
- Evaluation of H-1B Training Program, Regional Center for Workforce Excellence, Meadville, PA, 2012-2013
- Resident Safety and Services Survey Research 2010 - 2014, Housing Authority of City of Erie, Erie, PA.
- Development of Evaluation Plan for Nurturing Hearts, Erie, PA, April 2010-December 2010.
- Strategic Program Development and Evaluation Consultation Services, Mission Empower, Erie, PA, July 2010-December 2010.
- Designing an Evaluation System for the Outpatient Behavioral Health Services, Family Services Association of Bucks County, PA, April 2008-April 2010.
- Evaluation of the Tobacco Control Program, Erie Capacity-Building Project, Erie County Department of Health and Greater Erie Community Action Committee, June-November 2009.
- Data Analysis and Evaluation Plan Consultation Service for Center for Early Childhood Professional Development (CECPD), University of Oklahoma, Moore, OK, March-December 2009.
- Institute on Organizational Learning: Building Capacity to Produce Results, 2-day training institute for United Way of Fox Valley, Dunham Fund, and Community Foundation of the Fox River Valley, Aurora, IL, November 18-19, 2008.
- Process Improvement for the Child Care Training System and T.E.A.C.H. Scholarship Program, South Carolina Center for Child Care Career Development, Greenville, SC, 2007-2008.
- Development of an Organizational Assessment Tool, Center for Nonprofit Success, Washington, DC. January – March, 2008
- Evaluation of the Arkansas Early Childhood Professional Development System (AECPPDS), AR DHHS, Little Rock, AR, 2005-2007
- Research to Determine Factors Associated with Retention at the Erie County Technical School, Erie, PA, February-August 2006.
- Evaluation of the T.E.A.C.H. Early Childhood* Project Pennsylvania, Erie, PA 2003-2005

- Assessment of the Impact of Education on Caregiver Knowledge and Performance, Erie, PA 2003-2005
- IT needs assessment in Northwest Pennsylvania, Erie, PA 2004
- Building Inclusive Child Care, Erie, PA 2003-2004
- Diversity Tolerance, Erie, PA 2000-2002
- Russia's New Market Environment, Sochi, Russia, 1995

Presentations:

- "Rapid Moment Time Study" pilot training for PA DHS and Hornby Zeller Associates, March 11-13, 2019 and March 19-20, 2019 in Philadelphia, Scranton, Harrisburg, Pittsburgh, and Erie, PA
- "Lean Thinking for Program Evaluation" 1-day professional development workshop presented at the annual conference of the American Evaluation Association (AEA), October 25, 2016, Atlanta, Georgia with J. A. Miller.
- "Process Improvement Technics for Program Evaluation: Value and Process Flow Mapping" skill-building session presented at the annual conference of the American Evaluation Association (AEA), November 13, 2015, Chicago, Illinois with Joyce Miller.
- "Art in Action: Final Evaluation and Lessons Learned" poster session at the annual conference of the American Evaluation Association (AEA), November 11, 2015, Chicago, Illinois with Joyce Miller.
- "Erie Summer Jobs and More Program 2015" presentation to Erie County Council, Finance Committee, December 10, 2015 with Joyce Miller.
- "2014 HACE Safety and Services Survey" presentation on findings from 2014 Housing Authority of the City of Erie (HACE) at the HACE board meeting, November 20, 2014, Erie, PA with J.A. Miller and Nikole Niemeyer
- "Measuring Creativity and Creative Thinking: An Evaluator Perspective" presentation on findings from Art in Action program at Erie Arts & Culture 4th Summer Learning Lab, August 12-14, 2014 at Edinboro University, Edinboro, PA with J. A. Miller.
- "Process Improvement Technics for Program Evaluation: Value and Process Flow Mapping" skill-building session presented at the annual conference of the American Evaluation Association (AEA), October 15, 2014, Denver, CO with J. A. Miller.
- "The Evaluator's Dilemma: What Do You Do When Government Performance Measures Are so Far Removed from Programming Efforts?" think-tank session presented at the annual conference of the American Evaluation Association (AEA), October 16, 2014, Denver, CO with J. A. Miller.
- "Process Improvement Technics for Program Evaluation: Value and Process Flow Mapping" skill-building session presented at the annual conference of the American Evaluation Association (AEA), October 18, 2013, Washington DC with J. A. Miller.
- "Lean Thinking for Program Evaluation" 1-day professional development workshop presented at the annual conference of the American Evaluation Association (AEA), October 16, 2013, Washington DC with J. A. Miller.
- "Process Improvement for Nonprofit Service Organizations" 1-day workshop presented in

collaboration with the Nonprofit Partnership, September 27, 2013, Erie, PA with J.A. Miller.

- “Lean Thinking for Program Evaluation” webinar presented at the American Evaluation Association (AEA) Coffee Break, September 12, 2013, virtual presentation with J. A. Miller.
- “Process Improvement Tools for Program Evaluation: Value and Process Flow Mapping” skill-building session presented at the annual conference of the American Evaluation Association (AEA), October 24-26, 2012, Minneapolis, MN with J. A. Miller.
- “Infusion of Art in Elementary Curriculum for Math and Reading: Measuring Effectiveness of Art in Action Program” paper session presented at the annual conference of the American Evaluation Association (AEA), October 24-26, 2012, Minneapolis, MN with J. A. Miller.
- “Improving Performance Through Lean Thinking” session at the CAAP 2012 Conference, April 18-20, 2012, Harrisburg, PA.
- “Process Improvement Techniques for Program Evaluation: Adding New Tools to the Evaluator Tool Box” skill-building session presented at the annual conference of the American Evaluation Association (AEA), November 2-5, 2011, Anaheim, CA with J. A. Miller.
- “Evaluation and Improving Performance Through Lean Thinking” session at the National Peer to Peer (NPtP) ROMA Training and Certification Project Annual Fall In-Service Continuing Education Program (ICEP), October 24-25, 2011, Baltimore, MD with Joyce Miller.
- “Improving Internal Processes: How to Save Time, Save Steps, Save Money” 3-hour workshops for the Erie Regional Chamber, participants from local municipalities, October 17 and 26, 2011 with Joyce Miller.
- “Process Improvement Techniques for Program Evaluation: Adding New Tools to the Evaluator Tool Box” skill-building session presented 34th Annual Conference: *Inspired Design for Informed Action* Eastern Evaluation Research Society, May 2, 2011, Galloway, NJ with Joyce Miller.
- “Lean Thinking as a Tool for Organizational Sustainability” presented to ReTool Erie grantees, Erie, PA, April 19, 2011 with Joyce Miller.
- “Quality Improvement in Early Care and Education Workforce: Outcomes and Impact of the T.E.A.C.H. Early Childhood Project” invited author session at 33rd Annual Conference of Eastern Evaluation Research Society, April 18-20, 2010, Galloway, NJ.
- “Application of Lean in the Human Services: South Carolina T.E.A.C.H. Project Experience” session at the annual Lean Educator Conference, May 28-30, 2009, Minneapolis, MN with J. A. Miller.
- “Turning Unacceptable Results into Exceptional Results: Process Improvements for Service Organizations” 6-hour training, presented at the Institute on Organizational Learning, November 18-19, 2008 Aurora, IL with J. A. Miller and B. Carnohan.
- “Creating a Culture of Process Improvement in the Human Services: South Carolina T.E.A.C.H. Project Experience” demonstration session at the annual conference of the American Evaluation Association (AEA), November 5, 2008, Denver, CO with J. A. Miller and B. Carnohan.
- “Measuring Progress and Outcomes” 2-hour training, presented at the BE A BRIDGE Regional Summit, September 29, 2008, Cranberry, PA.
- “Designing and Implementing Effective and Efficient Work Processes to Meet the Needs of Clients” workshop, presented on April 16, 2008 at 2008 National T.E.A.C.H. Early Childhood® and Child Care WAGE\$® Conference, Chapel Hill, NC with D. Nodine.

- “Do It Yourself Outcomes” workshop, presented on March 19, 2008 at the Nonprofit Partnership, Erie, PA with J. A. Miller.
- “*Learning2CTM*: Opportunities, Improvements, and Results” 2-day workshop, presented November 29-30, 2007, at Keystone Business Service Center, Erie, PA with J. A. Miller.
- “*Learning2CTM*: Opportunities, Improvements, and Results” seminar, presented November 12, 14, and 15, 2007 at Keystone Business Service Center, Erie, PA with J. A. Miller.
- “Creating a Culture of Process Improvement in the Human Services: An Application of Lean Philosophy” demonstration session at the annual conference of the American Evaluation Association (AEA), November 8, 2007, Baltimore, MD with J. A. Miller.
- “Helping Your Organization Do More with Less” workshop at The Nonprofit Day, November 1, 2007, sponsored by the Nonprofit Partnership, Erie, PA with J. A. Miller.
- “Evaluating State Professional Development Systems” Reflection and Action Roundtable, NAEYC’s National Institute for Early Childhood Professional Development, Pittsburgh, PA, June 10-13, 2007 with J. A. Miller.
- “Value Stream/Process Flow Mapping for the Training Program and T.E.A.C.H. Scholarship Program” workshop for the South Carolina Child Care Career Center, February 20-22, 2007, Greenville, South Carolina.
- Overview of Value Stream/Process Flow Mapping – workshop for the South Carolina Child Care Career Center, January 30-31, 2007, Greenville, South Carolina; and follow-up workshop for the Training Program and T.E.A.C.H. Scholarship Program workshop for the South Carolina Child Care Career Center, February 20-22, 2007, Greenville, South Carolina.
- Overview of Value Stream/Process Flow Mapping – workshop for the Arkansas Department of Human Services, November 20-21, 2006, Little Rock, Arkansas; and follow-up workshop for AR DHHS Subsidy Program, January 23-25, 2007, Little Rock, AR.
- “Evaluating a State’s Early Care and Education Professional Development System: What Do We Really Need to Know & Where Do We Begin?” presented at the AEA Conference, Portland, OR, Nov. 3, 2006 with J. A. Miller.
- Process Flow Mapping, AECPPDS Practitioner Registry – workshop for the Arkansas Early Childhood Professional Development System, September 6-8, 2006, Jonesboro, Arkansas.
- Evaluating a State’s Professional Development System: What Do We Really Need to Know & Where Do We Begin? NAEYC’s National Institute for Early Childhood Professional Development, San Antonio, Texas June 4-7, 2006 with Dr. J. A. Miller and D. Alliston
- Improving Child Caregivers' Beliefs and Practices: The Impact of the Teacher Education and Compensation Helps (T.E.A.C.H. Early Childhood* Project), American Evaluation Association, Atlanta Georgia, November 2004, with Dr. J. A. Miller and M. Butcher.
- Quality Improvements in Child Care: The Impact of the T.E.A.C.H. Early Childhood® Project, American Evaluation Association, Reno/Sparks Nevada, November 2003, with Dr. J. A. Miller and M. Butcher.

Publications:

- “Arts in Education: The Impact of the Arts Integration Program and Lessons Learned” in *Journal for Learning through the Arts*, 14(1). Miller, J. A. & Bogatova, T. (2018).
<http://dx.doi.org/10.21977/D914128357> Retrieved from
<https://escholarship.org/uc/item/2dt3j2xv>
- “Using Creative Teaching to Teach Creativity: The Art in Action Project” in *Creative Teaching: Teaching Creativity*. Bogatova, T., Dempsey, J. C., Hyatt, J., Meyer, M., Miller, J., Nowak, H., Omniewski, R., Tomlinson, M., Wilkerson, C., NY: Springer Science and Business Media, 2013.
- “Improving Performance in Service Organizations: How to Implement a Lean Transformation” (with J. Miller and B. Carnohan), book published by Lyceum Books, Inc. Chicago, IL, 2011.
- “Quality Improvements to the Early Care and Education Workforce: Outcomes and Impact of the T.E.A.C.H. Early Childhood Project” (with Joyce Miller), *Evaluation and Program Planning* 32(3), 257-277, August 2009.

Relevant Continuing Education:

- Emerging Leaders Pittsburgh/Class of 2018, US Small Business Administration, April-November, 2018
- Propensity Score Matching: Theories and Applications, presented by M.H. Clark and Haiyan Bai at AEA 2014 Conference, Denver, CO, October 15, 2014.
- Leadership for Sustainability with Peter Senge, Society for Organizational Learning/MIT, June 18-20, 2014, Ashland, MA.
- Foundations for Leadership with Peter Senge, Society for Organizational Learning/MIT, December 11-13, 2013, Bedford, MA.
- Developmental Evaluation, presented by Michael Quinn Patton at AEA 2011 Conference, Anaheim, CA, October 30-November 1, 2011.
- Change Management and Culture of Continuous Improvement, 2010 ASQ Buffalo “Lean Six Sigma” Conference, Buffalo, NY, October 20-21, 2010.
- Effective Charter School Governance, presented by Brian Carpenter at Montessori Regional Charter School board development meeting, Erie, PA, May 8, 2010, 8 am-3 pm (6 hours).
- Write to the Point: Effective Writing for Evaluators, presented by Joy Quill, at the 33rd Annual Conference of Eastern Evaluation Research Society, Galloway, NJ, April 18, 2010 2:30-5:30 pm (3 hours).
- Simulation Workshop: Value Stream Mapping in a Virtual Environment, presented by Lean Transformation Group, at Lean Educator Conference, Minneapolis, MN, May 28, 2009 1-4 pm (3 hours).
- Show Off Your Outcomes with Logic Models and Evaluation, presented by Susan Washinger, M.Ed. and Joe Fay, M.A., Pennsylvania Coalition to Prevent Teen Pregnancy at Penn State Erie, The Behrend College, Erie, PA, Feb. 19-20, 2008 8:30 am-3:30 pm (14 hours).
- How to prepare an Evaluation Dissertation Proposal, presented by Nick L. Smith, at the American Evaluation Association annual conference, Baltimore, Maryland, Nov.7, 2007 8 am-3 pm (6 hours).
- Six Sigma Training, presented by Mitch Millstein, CFPIM, C.P.M., CQM, CQE, Implementation Specialist, Manufacturers’ Association of Northwest Pennsylvania, Erie, PA, February 14, March 7, April 10, 2007.

- Lean Operations Champion Training, presented by Mitch Millstein, CFPIM, C.P.M., CQM, CQE, Implementation Specialist, Manufacturers' Association of Northwest Pennsylvania, Erie, PA, Oct. 3, 24, & Nov. 14, 2006.
- Applications of Multiple Regression in Evaluation: Mediation, Moderation, and More, presented by Dale Berger, at the American Evaluation Association annual conference, Portland, Oregon, Nov.1, 2006 8-3 pm (6 hours).
- Nutrition and Physical Activity for Children and Adults (NAP SACC) Training, presented by Sara Benjamin, Little Rock, AR, October 9, 2006, 9:30 am – 4:30 pm (6 hours).
- Program Administration Scale Assessor Training, presented by Teri Talan, Director Public Policy, and Jill Bella, Senior Research Associate at the McCormic Tribune Center for Early Childhood Leadership, National-Louis University, Camp Hill, PA, January 18-20, 2005, 8:30 am – 4:40 pm for 3 days (21 hours).
- Focus Group Interviewing, workshop presented by Richard Krueger at the American Evaluation Association annual conference, Atlanta, Georgia, Nov.3, 2004 12-3 pm (3 hours).
- Video use for evaluation, workshop presented by Barbara Rosenstein at the American Evaluation Association annual conference, Atlanta, Georgia, Nov.3, 2004 8-11am (3 hours).
- Evaluation 101, workshop presented by John McLaughlin at the American Evaluation Association annual conference, Atlanta, Georgia, Nov.1-2, 2004 9 am-4 pm (14 hours).
Committee

Other Experience and Professional Memberships

2014-2015	Member, Advisory Board for GEARS Afterschool Program
2013-2015	Member, Society for Organizational Learning
2013	Member, Long Range Planning Committee at Erie Day School
2012-2013	Regional Representative of Consortium Leadership Team, Destination Erie : A Regional Vision, Erie, PA
2010-2012	Member, Eastern Evaluation Research Society
2010	Board Member, Montessori Regional Charter School, Erie, PA
2009-2011	Member, Drucker Society of Western Pennsylvania
2004-2008	Member, National Association for the Education of Young Children
2004-present	Member, American Evaluation Association
2018-present	Member, Rotary Club of Erie

Honors

2010	Invited Author Award, 33 rd Annual Conference of Eastern Evaluation Research Society, Galloway, NJ. The Invited Author Award is a special academic honor that recognizes exceptional scholarship by recently-published authors in the field of program evaluation.
2019	Snowboard instructor of the year, HoliMont, Ellicottville, NY, 2018-2019

JENNIFER L MARTIN AND ASSOCIATES
(EDWOSB certified)

Professional Services

Economically Disadvantaged Women- Owned Small Business (EDWOSB)

NIACS Codes: 541611, 541648, 541690, 541990, 561499.

EIN# 42-1726203

DUNS# 07-885-4006

CAGE CODE# 711T1

Jennifer L. Martin, MBA:

Ms. Martin has worked as an independent consultant since 2003. JLM (Martin Associates) organizational experience includes strategic planning, organizational development, program evaluation, economic studies, reporting, grant writing, grants research (identification of funding sources, grant writing and submission of grant proposals) and business development for non-profit and for-profit businesses. As a women-owned small business (registered under the GIS small business repository, SAM, and other agencies as a EDWOSB), the business is able to provide scientific, technical, and management expertise, and related services involving research and demonstration projects, evaluation studies, strategic planning, program assessments, development, and support in the execution of activities for a variety of non-profits including hospitals, health care organizations, social services, education and scientific businesses.

Business planning and small business support is an area of significant experience, particularly with small start-up organizations. Economic data analysis (jobs and community analysis) are routinely completed for clients that require a business plan with economic forecasting and action steps for community leaders. Grant seeking, writing and proposal are strengths, with innovative strategies to match local, state, and federal funding sources. Ms. Martin has been a consultant for several CMS funded projects in health care (bundled payment program for hospitals) and is a federal grant reviewer.

Ms. Martin was involved in several initiatives for a multi-hospital collaborative to improve care and resources for care coordination through the CMS Innovation Center and has secured grant support for a variety of hospitals and health care consortiums. She has recently served as a presenter to the American Telemedicine Association, Tele-rehabilitation SIG, in collaboration with The TeleMental Health Institute, CEO, and UKMC Director of Center for Telemedicine & Telehealth. In 2016-2018, Ms. Martin was an external reviewer of proposals for the National Council on Behavioral Health, IDIQ bidding (also RFP, RFQ), and was a bid reviewer for a federal contract opportunity (reviewing documents, data, tables, budgets and in-text editing). Her experience includes funding awards for clients that have included telehealth, telemedicine, economic development, transportation, social services, housing, scientific research, education, and overall health services.

In Behavioral Health, Ms. Martin was a project leader for HRSA awarded projects (\$1.5M)- A Rural Opioid Overdose Reversal (ROOR) grant and Rural Health Opportunity Grants (RHOP) to integrate a behavioral health and primary care services for opioid abuse and substance abuse services in collaboration with community providers, emergency responders, and referrals to behavioral health case management. In children's behavioral health, she coordinated the Children's Health Integration Network (CHIN), to improve linkages between primary care and behavioral health care in rural underserved areas.

In education and social services, Ms. Martin has worked with Intermediate Units for school district systems in Pennsylvania to secure funding from the U.S. Department of Education. She has also helped fund several school-based wellness and educational grants from foundations and local non-profits to promote K-12 programs. Ms. Martin has written a highly scored grant to the U.S. Department of Education from Intermediate Unit 5 (IU5) that covers a 13-county region of school districts in western Pennsylvania.

JENNIFER L. MARTIN, MBA
(EDWOSB Certified)
5240 Streamwood Drive, Erie, PA 16506-3919
814.434.2976 • grants411@gmail.com

PROFESSIONAL EXPERIENCE

Martin Associates, Erie, PA (EIN#42-1726203)

6/03 to Present

President – Grant Writing and for-profit Business Consulting – Certified Economically Disadvantaged Women-Owned Small Business (EDWOSB); NIACS Codes: 541611, 541648, 541690, 541990, 561499.

- Experience includes grant writing for hospitals and healthcare organizations, units of local government, social service organizations, commercial businesses and for-profit organizations. Successfully secured over \$18M since July of 2003. Expertise includes organizing unusual projects and non-traditional collaborations / cooperatives.
- Strategic planning documents, needs analysis, writing quality grant proposals, subject matter expert.
- External reviewer of proposals for National Council on Behavioral Health, IDIQ bidding (also RFP, RFQ), bid reviewer, score reviewer for documents, data, tables, budgets and in-text writing, editing.
- Presenter for American Telemedicine Association, Tele-rehabilitation SIG, in collaboration with TeleMental Health Institute, CEO, and UKMC Director of Center for Telemedicine & Telehealth.
- Project leadership for work design RFP writing for entire proposals, and specific federal OMB requirements.
- CMS leader coordinator for a bundled payment project (CAH hospitals), description of services, budget review.
- Successfully secured grants from federal, state, local, foundation and private sources including: HRSA, NIH (SBIR research), SAMHSA, HUD, FHLB, DCED, USDA, RWJ Fdn., Fannie Rippel Fdn., Kresge Fdn., and others). Funding secured for: local and regional government, housing, community and economic development, healthcare, education, social services, scientific investigation (NIH, SBIR), and business development.
- Behavioral Health Project Leader for HRSA awarded projects (\$185,000) in Rural Opioid Overdose Reversal (ROOR) grant, to integrate pharmacy standing order, refills for first responders, and referrals to behavioral health case management. and Children's Health Integration Network (CHIN), for primary care/behavioral health care.
- Commercial and for-profit investor proposals to InnovationWorks and Pittsburgh Life Sciences Greenhouse, as well as solicitation to private investors for initial offering in start-up behavioral health services provider.

Chronic Health Metrics, Inc., (d.b.a. Chronic Health Analytics), Erie, PA

6/02 to Present

Chief Financial Officer –Business Development (Part-time)

- Business development and innovation in health care analytics. Research supported by Pittsburgh Life Sciences Greenhouse, private investors and grants. Leadership team for training, design and implementation.
- Provisional patent secured for innovation in analytics that spans chronic illness disease management.

The Erie County Public Library Foundation, Inc., Erie, PA

9/01 to 6/03

President

- Responsible for the start-up and full implementation of major gifts, annual fund, capital campaigns and raised over \$200,000 for capital campaign within first six months in position for new library branch building.
- Implemented start-up of donor management program, annual fund and capital fund utilizing Microsoft Access.
- Began Honorarium/Memorial Program and annual fund that grew by 50% in first six months.
- Implemented capital campaign that was successful in raising building \$1.7M branch (first of four new planned branch libraries). Construction 2001-2002. Began multiple branch planning process throughout Erie County.

Hamot Health Foundation Second Century Fund, Hamot Medical Center, Erie, PA

4/99 to 9/01

Director of Development

- Planning and development for activities to increase 27 million endowment consistent with the hospital's strategic plan, through donor relations, planned-giving, capital campaigns, annual solicitations, grant proposals.
- Successfully wrote proposals and solicited corporate contributions of medical equipment and programming dollars over \$500,000 in 1st year (\$860K within 2-year period), (highest grants in position history).
- Determine priorities for pursuing areas of coordination to secure grants for the Hamot Medical Center, Hamot Health Foundation and Hamot Second Century Fund, and the Great Lakes Health Network. Successfully wrote proposals and secured funds from agencies such as: National Institute of Health (NIH), Robert Wood Johnson Foundation, Health Alliance Charitable Fund, Fannie Rippel Fdn, Ronald McDonald House Charities, etc...Grants included proposals for research, programming, and equipment.

PROFESSIONAL EXPERIENCE continued

Housing and Neighborhood Development Service (HANDS): Erie, PA**2/94 to 4/99*****Director of Planning and Development – (VP of Development)***

- Project Development and Management of multi and single-family housing projects, feasibility studies / analysis, (design and construction phases). Direct multiple work teams of property management staff, architects, and contractors ensuring compliance to designs, project specifications, reporting requirements.
- Successfully raised approximately \$10 million dollars for housing and related projects in four years.
- Strategic planning and successful fund raising has resulted in the development of over 200 units of housing within five years. Secured funds from U.S. Department of HUD, Federal Home Loan Bank (FHLB), HOME funds, Federal Low-income housing tax credits, Foundations, Corporations and Individuals donors. Demonstrated excellence in writing skills in preparation of technical proposals for project feasibility, analysis of real estate and market studies, and competitive grant proposals (96% success rate).
- Established programs with commercial banks to meet CRA requirements. Member of Board of Directors of St. Martin Center, Emergency FS Board, Bayfront Access (BABO), Asbury Woods Nature Center.

PROFESSIONAL ATHLETIC ACHIEVEMENTS - EXPERIENCE

Elite International Distance Runner/ NIKE Sponsored Professional Athlete**1985 to 2000*****United States Team Member for 8 World Championships, 4 Olympic Trials, World Cup & Pan Am Competitions***

- Silver Medalist in the Marathon - 1995 Pan American Games in Mar del Plata, Argentina (2:41:03).
- Twelfth Place in the 1996 Olympic Marathon Trials in Columbia, South Carolina (2:36:13).
- Winner: 1994 California International and 1993 Columbus Marathons, (2nd pl. 1995 & 1990 Columbus Marathon).
- NIKE contracted athlete and Team member for World Championships Half-Marathon in 1995 (Oslo, Norway), 1994 (Brussels, Belgium), 1993 (15k -The Netherlands), and 1989 (5 mile- Stavanger, Norway). Member of 1991 World Cup Marathon Team (London), and 1984 Osaka International Marathon (Osaka, Japan).
- Four-time Olympic Marathon Trials Qualifier (1984, 1988, 1992, 1996). One of only five U.S. women.
- Inducted into the 1996 Pennsylvania Sports Hall of Fame, 1993 Allegheny College Hall of Fame, 2013 Pittsburgh Marathon/Northwest PA Hall of Fame. Five-time Collegiate ALL-AMERICAN Runner in Cross-Country (13th in 1982, 5th in 1983) and Track&Field (3rd in 10K 1982, 4th in 5K 1992; 3rd in 5k 1983), OlymTrials 3,000M Qualifier.
- 2010 – 2014 Professional Cyclist, Category 2 Cyclist for Kenda and Colavita Cycling Teams.

CONTINUING PROFESSIONAL EXPERIENCE

The Erie Metropolitan Transit Authority (EMTA): Erie, PA**11/90 to 2/94*****Transportation Planner/Capital Grants Manager***

- Managed and administered federal, state and local grants for transportation system, and capital expenditures. Reporting requirements for over 4 million in assets, communication coordinator for Metropolitan Planning Organization (MPO), County Planning Department/ Transportation Planning.

M/A-COM, Inc., Public Relations Division: Burlington, MA**3/89 to 4/90*****Assistant Editor/Writer-Technical writer/Public Relations Division***

- Coordinated financial mailings, information and wrote news / press releases for corporate headquarters. Wrote brochures for technical divisions, vendors, stockholders, and equipment purchasing agents.

Free-Col Laboratories; Meadville, PA**2/85 to 1/89*****Laboratory Analyst/Technician / (college classes in biology)***

- Director of Microbiology testing and bacteriological analysis for drinking water and milk products.

EDUCATION

Gannon University: Erie, PA**Graduation: 5/99*****Master of Business Administration (MBA)***

- Concentration in finance, strategic work team, human resources and effective resource utilization.
- International studies / Thesis completed in economy, manufacturing, accounting, finance.

Allegheny College: Meadville, PA**Graduation: 6/83*****Bachelor of Arts in English, Minor in Political Science***

- Two-year concentration in Calculus, Chemistry, and Biology. Junior/Senior study in Writing/English.
- Strong computer skills in desktop software, statistical (SPSS-X), Access, Excel, Word and more.**

Appendix C: Sample of Work – Erie Day School Capital Campaign and Strategic Plan



Erie Day School
Igniting passion for learning

EDS Capital Campaign: Preliminary Report

Long Range Planning Committee Meeting

September 17, 2013

Erie Day School



Erie Day School

Igniting passion for learning.

EDS Capital Campaign Online Survey Data Analysis

During May and July of 2013, 15 focus groups were conducted with all EDS students grades pre-school through 8th grade (during 7 sessions), current and former faculty and staff (2 sessions plus written input), current and former trustees (1 session), donors, current parents (3 sessions), alumni and parents of alumni (1 session) and community leaders (1 session plus written input) to get a sense of their priorities for Erie Day School. We obtained feedback from nearly every student enrolled at EDS during the 2012-13 school year. About 40 people attended and provided input during the 'adult' sessions.

An online survey was developed based on the brainstorming conducted during the 15 focus group sessions and the several interviews to hear from a broader audience.

The survey link went out to all current parents (221), staff (27), and trustees (23) as well as a list of an additional 167 people who are former parents and trustees, for a total of 438 via email. In addition, the survey was available on the EDS website and posted on the Parent Group's Facebook page. The survey ran from Monday, August 26 to Tuesday, September 10, 2013. Responses were received from 140 people.

Note on Organization of Data: Where appropriate/applicable, each table, from top to bottom, is organized from higher to lower priority or from immediate to long-term priority.

Part I: Direction and Goals

Table 1: Respondents' Roles

Role	Frequency*	Percent**
Parent (includes former)	108	77.7%
Faculty and Staff (includes former)	23	16.5%
Alumnus/Alumna	11	7.9%
Trustee (includes former)	11	7.9%
Donor (includes former)	8	5.8%
Grandparent	4	2.9%
Community Member	9	6.5%

* Total number of responses is 139.

** Does not add up to 100% as respondents were able to choose more than one role.

Table 2: Capital Campaign Priorities: Direction - All

Direction	Priority 1	Priority 2	Priority 3
Facility Renovation and Capital Upgrades (N=125)	50.4%	32.8%	16.8%
Endowment Fund (N=125)	29.6%	44.8%	25.6%
Scholarship Fund (N=125)	20.0%	22.4%	57.6%

Chart 1: Capital Campaign Priorities: Direction - All

What level of priority would you give each part of the Capital Campaign? Please rank each goal in order of importance, with 1 being your highest priority and 3 being your lowest:

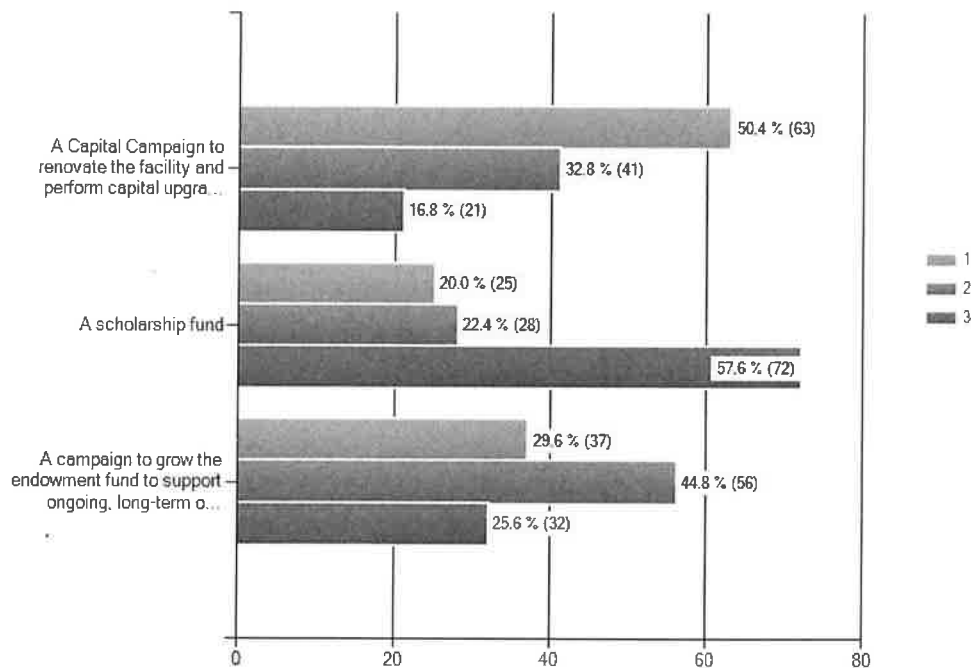


Figure 1: Capital Campaign Priorities: Direction – All (Rating Average)

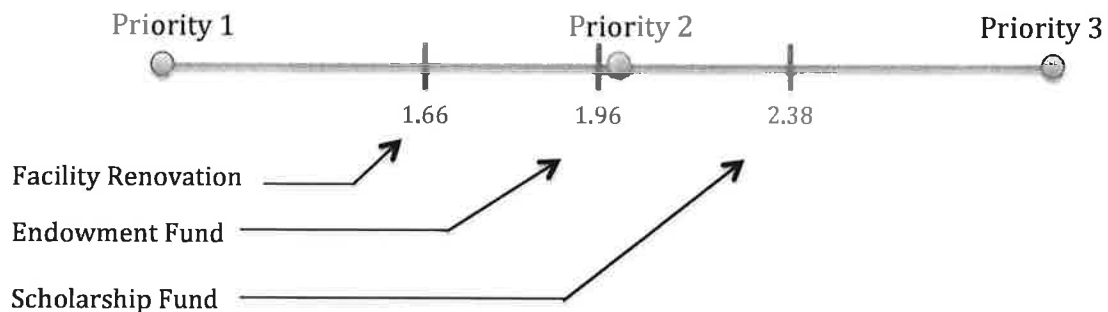


Table 3: Capital Campaign Priorities: Goals - All

Goals	Priority 1	Priority 2	Priority 3	Priority 4	Priority 5	Priority 6
Facility Renovation and Capital Upgrades (N=127)	24.4%	26.8%	14.2%	17.3%	9.4%	7.9%
Technological Upgrades (N=127)	18.9%	22.0%	22.8%	15.0%	12.6%	8.7%
Faculty Compensation/PD (N=127)	14.2%	14.2%	20.5%	29.9%	16.5%	4.7%
Campus Expansion (N=127)	14.2%	16.5%	22.8%	14.2%	17.3%	15.0%
Endowment Fund (N=127)	13.4%	13.4%	11.8%	15.0%	19.7%	26.8%
Scholarship Fund (N=127)	15.0%	7.1%	7.9%	8.7%	24.4%	37.0%

Chart 2: Capital Campaign Priorities: Goals - All

What level of priority would you give each overarching goal? Please rank each goal in order of importance, with 1 being your highest priority and 6 being your lowest:

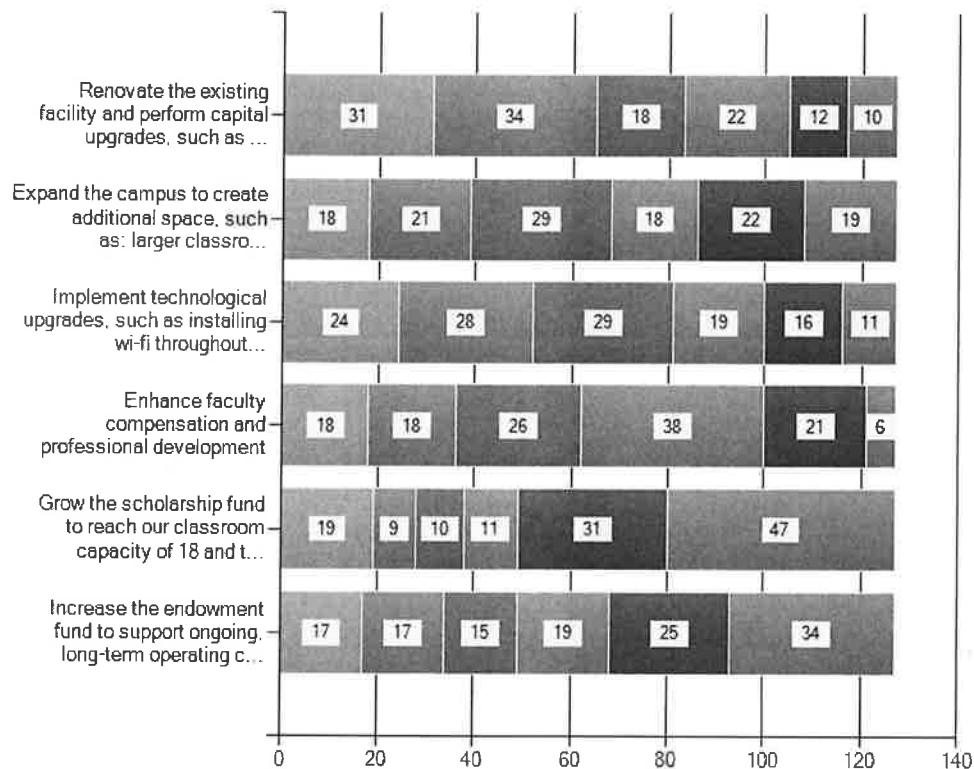


Figure 2: Capital Campaign Priorities: Goals -All

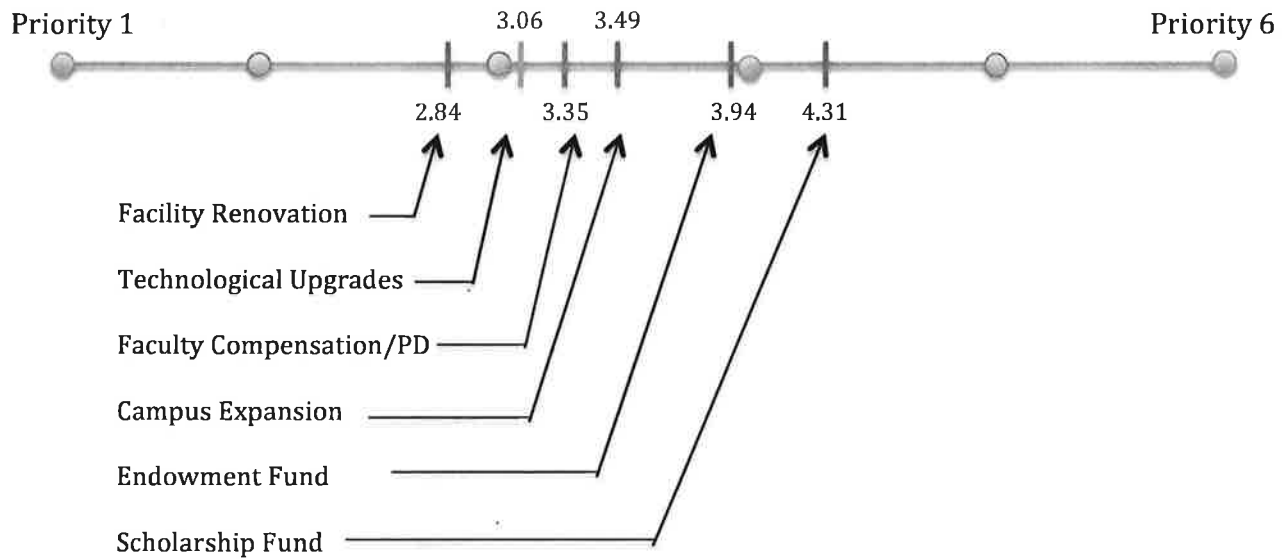


Table 4: Capital Campaign Priorities: Direction – Parents/Grandparents

Direction	Priority 1	Priority 2	Priority 3	Mean
Facility Renovation and Capital Upgrades (N=98)	44.9%	35.7%	19.4%	1.75
Endowment Fund (N=98)	32.7%	39.8%	27.6%	1.95
Scholarship Fund (N=98)	22.4%	24.5%	53.1%	2.31

Table 5: Capital Campaign Priorities: Goals - Parents/Grandparents

Goals	Priority 1	Priority 2	Priority 3	Priority 4	Priority 5	Priority 6	Mean
Facility Renovation and Capital Upgrades (N=100)	23.0%	28.0%	13.0 %	18.0%	9.0%	9.0%	2.89
Technological Upgrades (N=100)	21.0%	20.0%	24.0%	14.0%	12.0%	9.0%	3.03
Faculty Compensation/PD (N=100)	13.0%	14.0%	21.0%	31.0%	15.0%	6.0%	3.39
Campus Expansion (N=100)	13.0%	16.0%	22.0%	15.0%	18.0%	16.0%	3.57
Endowment Fund (N=100)	14.0%	14.0%	12.0%	13.0%	21.0%	26.0%	3.91
Scholarship Fund (N=100)	16.0%	8.0%	8.0%	9.0%	25.0%	34.0%	4.21

Table 6: Capital Campaign Priorities: Direction – Trustees/Donors

Direction	Priority 1	Priority 2	Priority 3	Mean
Endowment Fund (N=14)	50.0%	42.9%	7.1%	1.57
Facility Renovation and Capital Upgrades (N=14)	35.7%	50.0%	14.3%	1.79
Scholarship Fund (N=14)	14.3%	7.1%	78.6%	2.64

Table 7: Capital Campaign Priorities: Goals – Trustees/Donors

Goals	Priority 1	Priority 2	Priority 3	Priority 4	Priority 5	Priority 6	Mean
Endowment Fund (N=14)	35.7%	28.6%	0%	7.1%	21.4%	7.1%	2.71
Facility Renovation and Capital Upgrades (N=14)	21.4%	35.7%	7.1 %	21.4%	7.1%	7.1%	2.79
Technological Upgrades (N=14)	21.4%	0%	42.9%	21.4%	14.3%	0%	3.07
Faculty Compensation/PD (N=14)	0%	21.4%	28.6%	28.6%	14.3%	7.1%	3.57
Scholarship Fund (N=14)	14.3%	7.1%	14.3%	0%	28.7%	35.7%	4.29
Campus Expansion (N=14)	7.1%	7.1%	7.1%	21.4%	14.3%	42.9%	4.57

Table 8: Capital Campaign Priorities: Direction – Faculty

Direction	Priority 1	Priority 2	Priority 3	Mean
Facility Renovation and Capital Upgrades (N=22)	68.2%	27.3%	4.5%	1.36
Endowment Fund (N=22)	27.3%	59.1%	13.6%	1.86
Scholarship Fund (N=22)	4.5%	13.6%	81.6%	2.77

Table 9: Capital Campaign Priorities: Goals – Faculty

Goals	Priority 1	Priority 2	Priority 3	Priority 4	Priority 5	Priority 6	Mean
Faculty Compensation/PD (N=22)	27.3%	27.3%	31.8%	9.1%	4.5%	0%	2.36
Facility Renovation and Capital Upgrades (N=22)	27.3%	27.3%	9.1 %	22.7%	13.6%	0%	2.68
Campus Expansion (N=22)	18.2%	9.1%	27.3%	13.6%	18.2%	13.6%	3.45
Technological Upgrades (N=22)	4.5%	18.2%	22.7%	27.3%	13.6%	13.6%	3.68
Endowment Fund (N=22)	22.7%	9.1%	4.5%	18.2%	18.2%	27.3%	3.82
Scholarship Fund (N=22)	0%	9.1%	4.5%	9.1%	31.8%	45.5%	5.0

Table 10: Capital Campaign Priorities: Direction – Alumni/Community Members

Direction	Priority 1	Priority 2	Priority 3	Mean
Endowment Fund (N=18)	33.3%	61.1%	5.6%	1.72
Facility Renovation and Capital Upgrades (N=18)	44.4%	27.8%	27.8%	1.83
Scholarship Fund (N=18)	22.2%	11.1%	66.7%	2.44

Table 11: Capital Campaign Priorities: Goals – Alumni/Community Members

Goals	Priority 1	Priority 2	Priority 3	Priority 4	Priority 5	Priority 6	Mean
Technological Upgrades (N=14)	16.7%	27.8%	22.2%	22.2%	11.1%	0%	2.83
Facility Renovation and Capital Upgrades (N=14)	27.8%	16.7%	22.2%	11.1%	5.6%	16.7%	3.00
Endowment Fund (N=14)	16.7%	16.7%	11.1%	22.2%	16.7%	16.7%	3.56
Scholarship Fund (N=14)	22.2%	5.6%	16.7%	5.6%	22.2%	27.8%	3.83
Faculty Compensation/ Professional Development (N=14)	5.6%	11.1%	16.7%	27.8%	33.3%	5.6%	3.89
Campus Expansion (N=14)	11.1%	22.2%	11.1%	11.1%	11.1%	33.3%	3.89

Part II: Renovating Facility and Performing Capital Upgrades

Table 12: Facility Renovation Priorities* – All

Projects	Immediate Priority	Short-term Priority	Long-term Priority	Mean**	Not a Priority	Don't Know
Security Upgrades (N=118)	41.5%	23.7%	16.9%	1.70	13.6%	4.2%
Kitchen Updates/New Appliances (N=118)	24.6%	38.1%	19.5%	1.94	8.5%	9.3%
New Windows in Early Childhood (N=118)	19.5%	39.0%	16.1%	1.95	5.1%	20.3%
Air Conditioning In Early Childhood (N=117)	13.7%	39.3%	18.8%	2.07	5.1%	23.1%

* Immediate priority is 0-2 years, Short-term priority is 3-5 years, Long-term priority is 6-10 years.

** Mean does not include responses "Not a Priority" and "Don't Know." It ranges from 1=Immediate Priority to 3=Long-term Priority.

Comments:

I think that all of these improvements are long overdue to the campus, and the need is immediate. Security especially. The kitchen appliances have remained the same since I was a student there fifteen years ago. The large windows in the early childhood area are also a security issue - they should be more secure. Air conditioning improvements would make for a nice improvement, but does not seem as vital as security, then kitchen updates secondly.

A 10-20 year master campus plan should be done.

A business case needs to be developed to determine if they don't know items pay off.

Chart 3: Facility Renovation Priorities – All

The following ideas relate to renovating the existing facility. Please rate each project, program, or initiative in terms of whether you think it is an immediate priority (0-2 years), a short-term priority (3-5 years), a long-term priority (6-10 years), or not a priority.

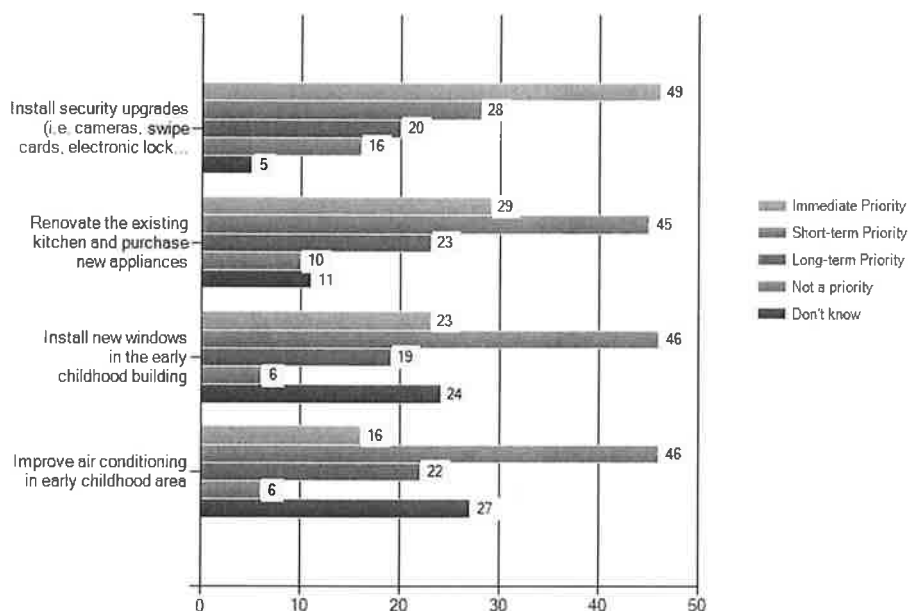


Table 13: Campus Expansion Priorities – All

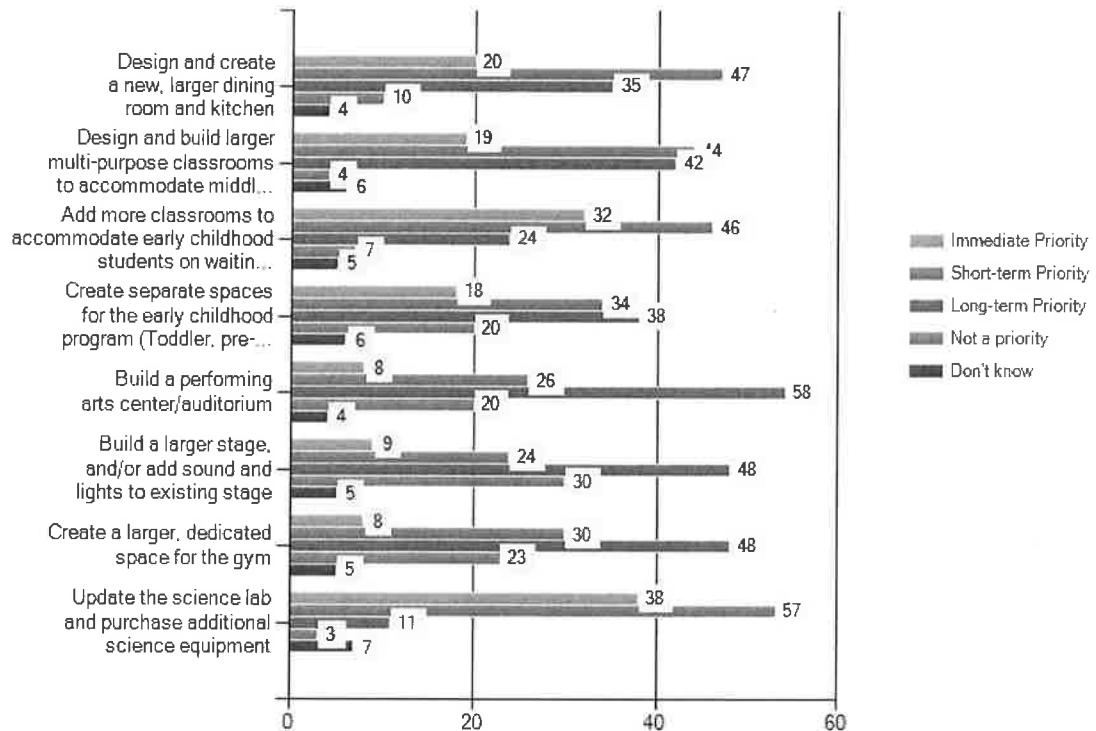
Projects	Immediate Priority	Short-term Priority	Long-term Priority	Mean**	Not a Priority	Don't Know
Update Science Lab/Equipment (N=116)	32.8%	49.1%	9.5%	1.74	2.6%	6.0%
More Classrooms in Early Childhood (N=114)	28.1%	40.4%	21.1%	1.92	6.1%	4.4%
Larger Dining Room/Kitchen (N=116)	17.2%	40.5%	30.2%	2.15	8.6%	4.2%
Larger Multi-Purpose Classrooms in Middle School (N=115)	16.5%	38.3%	36.5%	2.22	3.5%	5.2%
Separate Spaces: Early Childhood/Lower/Middle Schools (N=116)	15.5%	29.3%	32.8%	2.22	17.2%	5.2%
Larger Gym (N=114)	7.0%	26.3%	42.1%	2.46	20.2%	4.4%
Larger Stage/Sound and Lights (N=116)	7.8%	20.7%	41.4%	2.48	25.9%	4.3%
Performing Art Center/Auditorium (N=116)	6.9%	22.4%	50.0%	2.54	17.2%	3.4%

* Immediate priority is 0-2 years, Short-term priority is 3-5 years, Long-term priority is 6-10 years.

** Mean does not include responses "Not a Priority" and "Don't Know." It ranges from 1=Immediate Priority to 3=Long-term Priority.

Chart 4: Campus Expansion Priorities – All

The following ideas relate specifically to expanding the campus. Please rate each project, program, or initiative in terms of whether you think it is an immediate priority (0-2 years), a short-term priority (3-5 years), a long-term priority (6-10 years), or not a priority.



Comments:

Help the kitchen!!!

A master campus plan would allow for prioritization

Table 14: Grounds Renovation Priorities* – All

Projects	Immediate Priority	Short-term Priority	Long-term Priority	Mean**	Not a Priority	Don't Know
Playgrounds (N=118)	20.3%	36.4%	27.1%	2.08	12.7%	3.4%
Tennis Courts (N=117)	22.2%	29.9%	31.6%	2.11	12.8%	3.4%
Athletic Field (N=116)	12.9%	37.9%	34.5%	2.25	9.5%	5.2%

* Immediate priority is 0-2 years, Short-term priority is 3-5 years, Long-term priority is 6-10 years.

** Mean does not include responses "Not a Priority" and "Don't Know." It ranges from 1=Immediate Priority to 3=Long-term Priority.

Comments:

Remove the tennis courts for another purpose.
Separate lower school art from middle school art classrooms.
Add a fence to the early childhood playground to ensure safety of students from the parking lot traffic.
The tennis courts are sad, and should get some attention. It deteriorates from the presence of the school campus and looks rather dilapidated. The tennis courts just need a little TLC and weeding - nothing major. Possibly suggest working on them during any of the "Clean up" days - or designing a new clean up day to help the courts. Put up nets, maybe resurface the court itself. I think the playgrounds and athletic fields are fine the way they are.

Table 15: Green Campus Priorities* – All

Projects	Immediate Priority	Short-term Priority	Long-term Priority	Mean**	Not a Priority	Don't Know
Community Garden (N=118)	19.5%	39.0%	16.1%	1.97	5.1%	20.3%
Greenhouse (N=118)	13.7%	39.3%	18.8%	2.02	5.1%	23.1%
Solar Energy (N=117)	41.5%	23.7%	16.9%	2.33	13.6%	4.2%
Geothermal Energy (N=117)	24.6%	38.1%	19.5%	2.40	8.5%	9.3%

* Immediate priority is 0-2 years, Short-term priority is 3-5 years, Long-term priority is 6-10 years.

** Mean does not include responses "Not a Priority" and "Don't Know." It ranges from 1=Immediate Priority to 3=Long-term Priority.

Comments:

I am not familiar enough with any of these technologies to make an informed decision regarding their viability as possibilities for EDS.
These are excellent ideas, but should be manifested or considered once neglected areas of the school are attended to.
All good ideas but need to be supported by details.
Business cases should be done to determine the pay-off of each option. New windows and insulation are probably the most cost effective way to reduce the carbon footprint.

Table 16: Campus Related Priorities – All

Initiatives	Priority 1	Priority 2	Priority 3	Priority 4	Mean
Facility Renovation (N=119)	68.9%	23.5%	6.7%	0.8%	1.39
Campus Expansion (N=119)	13.4%	34.5%	30.3%	21.8%	2.61
Grounds Renovation (N=119)	5.0%	33.6%	43.7%	17.6%	2.74
Green Campus (N=119)	12.6%	8.4%	19.3%	59.7%	3.26

Chart 5: Campus Related Priorities – All

In terms of the Capital Campaign initiatives above, please rank the following ideas in order of important with 1 being your highest priority and 4 being your lowest.

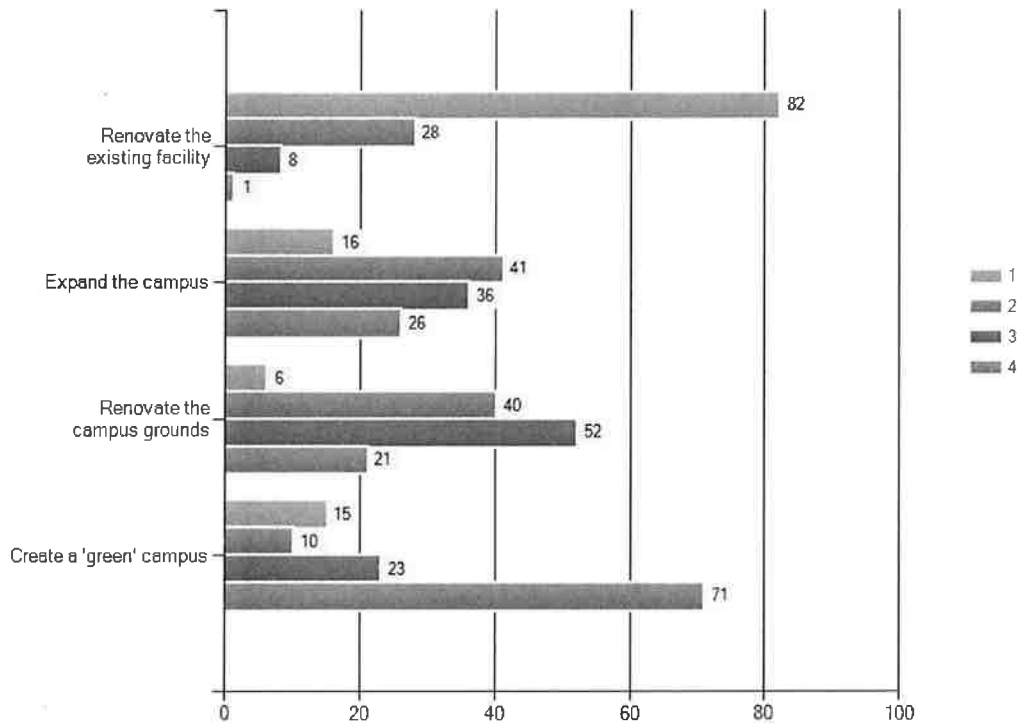


Table 17: Technological Improvements Priorities* - All

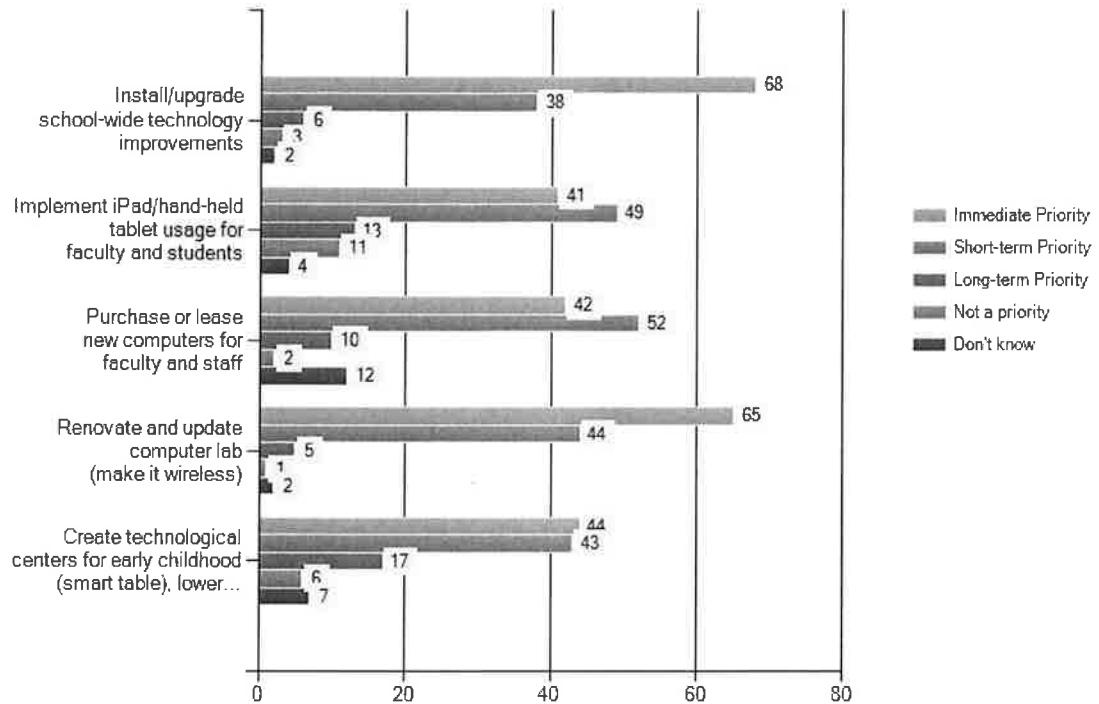
Projects	Immediate Priority	Short-term Priority	Long-term Priority	Mean**	Not a Priority	Don't Know
School-wide Technology Upgrades (N=117)	58.1%	32.5%	5.1%	1.45	2.6%	1.7%
Wireless/Updated Computer Lab (N=117)	55.6%	37.6%	4.3%	1.47	0.9%	1.7%
New Computers (N=118)	35.6%	44.1%	8.5%	1.69	1.7%	10.2%
Hand-held Tablets/iPads (N=118)	34.7%	41.5%	11.0%	1.73	9.3%	3.4%
Tech Centers for: Early Childhood, Lower, and Middle Schools (N=117)	37.6%	36.8%	14.5%	1.74	5.1%	6.0%

* Immediate priority is 0-2 years, Short-term priority is 3-5 years, Long-term priority is 6-10 years.

** Mean does not include responses "Not a Priority" and "Don't Know." It ranges from 1=Immediate Priority to 3=Long-term Priority.

Chart 6: Technological Improvements Priorities* - All

The following ideas relate to implementing technological improvements and upgrades so that Erie Day School is always on the cutting-edge of using technology to enhance learning. Please rate each project, program, or initiative in terms of whether you think it is an immediate priority (0-2 years), a short-term priority (3-5 years), a long-term priority (6-10 years), or not a priority.



Comments:

When we say we need to "update technology" we should understand what that means. Does it mean iPads, etc.? I'm not certain those devices fundamentally aid in learning. However, if technology means getting the kids to work on more technology in a lab environment, this is more appropriate. I'm always baffled when people say "technology" and I think they all limit their thoughts to apple products. That is not the point, Apple has convinced everyone they cannot function unless they have an iPad, but that's a consumer product that will soon be gone.

Not sure what the technological centers include, if staff doesn't have computers than probably should but not necessary to upgrade, implement ipads only if gives competitive recruiting advantage or can be tied to better teaching.

We should be a local technology leader.

Table 17: Endowment Fund Priorities* - All

Projects	Immediate Priority	Short-term Priority	Long-term Priority	Mean**	Not a Priority	Don't Know
Teachers Compensation and Professional Development (N=116)	59.5%	32.8%	6.0%	1.46	0.9%	0.9%
Regular Campus Improvements (N=116)	48.3%	42.2%	8.6%	1.60	0%	0.9%
Technology Upgrades (N=115)	50.4%	34.8%	13.9%	1.63	0%	0.9%
Reserve Fund (N=115)	40.0%	47.8%	10.4%	1.70	0.9%	0.9%
Scholarships (N=116)	35.3%	39.7%	21.6%	1.86	2.6%	0.9%

* Immediate priority is 0-2 years, Short-term priority is 3-5 years, Long-term priority is 6-10 years.

** Mean does not include responses "Not a Priority" and "Don't Know." It ranges from 1=Immediate Priority to 3=Long-term Priority.

Comments:

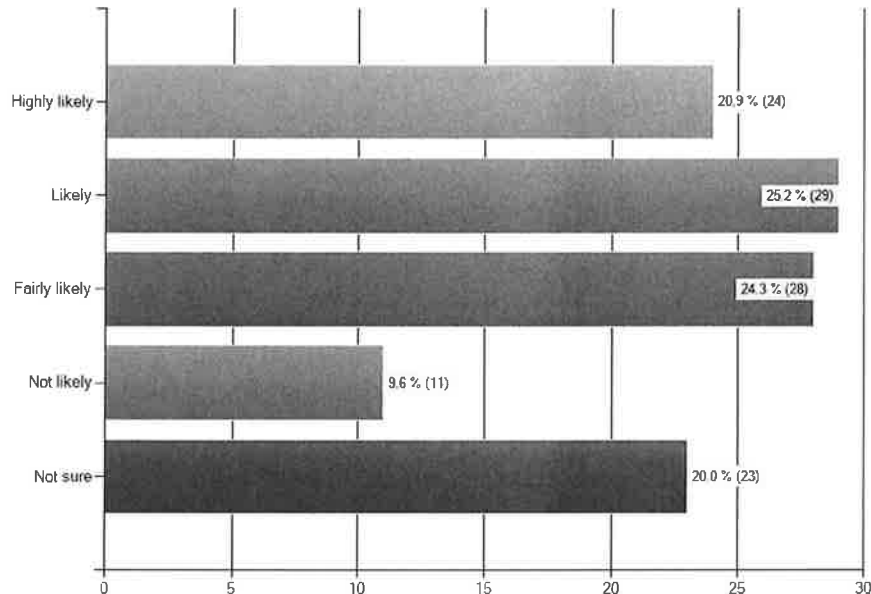
In my view "endowments" should not fund capital needs and the school should operate at or near break-even without the need to tap "endowments".

Table 18: Likelihood of Donating – All

Category	Highly Likely	Likely	Fairly Likely	Not Likely	Not Sure
Over Next 3 Years Above Annual Campaign Giving's (N=115)	20.9%	25.2%	24.3%	9.6%	20.0%
Renovate/Upgrade Facility (N=113)	23.0%	30.1%	17.7%	16.8%	12.4%
Expand Campus (N=112)	13.4%	26.8%	22.3%	24.1%	13.4%
Upgrade Technology (N=113)	21.2%	21.2%	23.0%	22.1%	12.4%
Teacher Compensation and Professional Development (N=113)	15.0%	28.3%	21.2%	19.5%	15.9%
Scholarship (N=114)	14.9%	21.9%	21.1%	28.9%	13.2%
Endowment (N=113)	20.4%	22.1%	23.9%	17.7%	15.9%

Chart 7: Likelihood of Donating – All

What is your likelihood of making a donation to the Capital Campaign over the next three years above what you regularly donate to the Annual Campaign?



Comments:

As a faculty member under another year with no increase in salary, difficult to even pay my bills much less donate.
Low income, but could volunteer at events to help and if asked help with improvements like painting.
Full tuition is expensive.
We are a low-income family. Can't afford to donate.
Depends on what goals are made priorities and if I see a benefit to them for the students and staff of the school.
I strongly support technology improvements.
Can't afford to contribute.
Recent college graduate with loan debt.
I want to give to an endowment fund not scholarship because I pay full tuition for 2 children.
I have a fundraising method that WILL generate long term income for the school. It is in this manner I wish to contribute.
Our son is just starting the toddler program so will only increase over this year.
Amount will depend on capability, but would hope to give an extra \$500/yr.
Still working on this year's budget.
I would like to help but cannot afford to.
Enhanced security system is top priority for me.

Chart 8: Likelihood of Donating to Goals – All

What is your likelihood of contributing toward achieving the following goals? Please check all that apply:

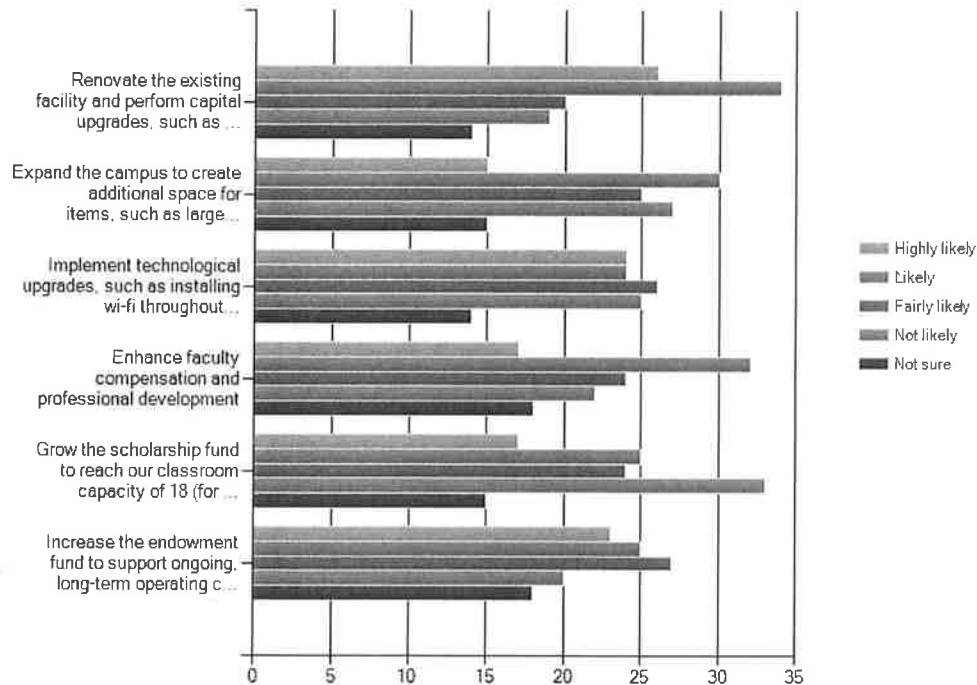


Table 19: Likelihood of Donating – Parents/Grandparents

Category	Highly Likely	Likely	Fairly Likely	Not Likely	Not Sure
Over Next 3 Years Above Annual Campaign Giving's (N=91)	20.9%	27.5%	27.5%	9.9%	14.3%
Renovate/Upgrade Facility (N=89)	23.6%	30.3%	19.1%	16.9%	10.1%
Expand Campus (N=88)	12.5%	26.1%	25.0%	25.0%	11.4%
Upgrade Technology (N=117)	20.2%	22.5%	22.5%	25.8%	9.0%
Teacher Compensation and Professional Development (N=89)	13.5%	13.5%	31.5%	21.3%	13.5%
Scholarship (N=90)	15.6%	20.0%	21.1%	31.1%	12.2%
Endowment (N=89)	20.2%	22.5%	25.8%	18.0	13.5%

Table 20: Likelihood of Donating – Trustees/Donors

Category	Highly Likely	Likely	Fairly Likely	Not Likely	Not Sure
Over Next 3 Years Above Annual Campaign Giving's (N=14)	35.7%	28.6%	14.3%	7.1%	14.3%
Renovate/Upgrade Facility (N=14)	14.3%	71.4%	0%	7.1%	7.1%
Expand Campus (N=14)	14.3%	28.6%	14.3%	35.7%	7.1%
Upgrade Technology (N=14)	14.3%	35.7%	28.6%	14.3%	7.1%
Teacher Compensation and Professional Development (N=14)	14.3%	35.7%	28.6%	14.3%	7.1%
Scholarship (N=14)	7.1%	28.6%	35.7%	21.4%	7.1%
Endowment (N=14)	35.7%	35.7%	21.4%	7.1%	0%

Table 21: Likelihood of Donating – Faculty

Category	Highly Likely	Likely	Fairly Likely	Not Likely	Not Sure
Over Next 3 Years Above Annual Campaign Giving's (N=20)	25.0%	20.0%	10.0%	10.0%	35.0%
Renovate/Upgrade Facility (N=20)	25.0%	30.0%	20.0 %	10.0%	15.0%
Expand Campus (N=20)	20.0%	30.0%	20.0%	15.0%	15.0%
Upgrade Technology (N=20)	30.0%	25.0%	10.0%	20.0%	15.0%
Teacher Compensation and Professional Development (N=20)	25.0%	25.0%	15.0%	20.0%	15.0%
Scholarship (N=20)	15.0%	20.0%	15.0%	35.0%	15.0%
Endowment (N=20)	30.0%	15.0%	20.0%	20.0%	15.0%

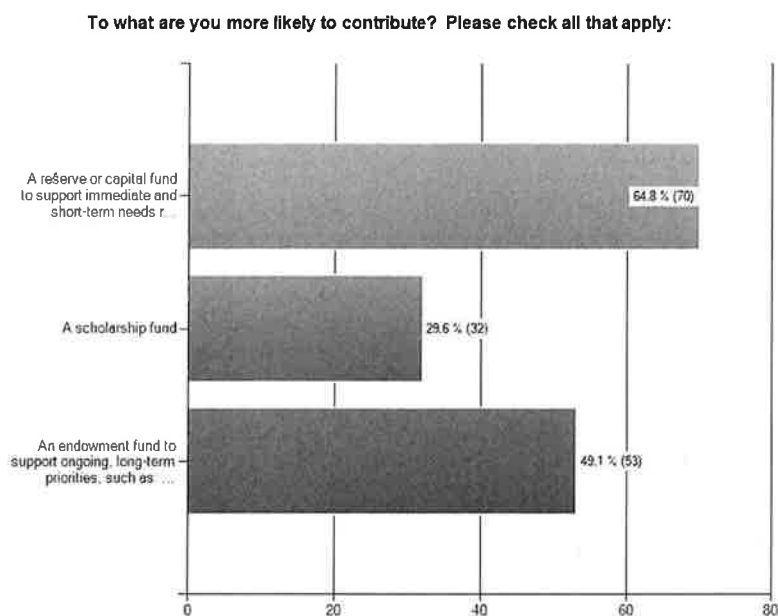
Table 22: Likelihood of Donating – Alumni/Community Members

Category	Highly Likely	Likely	Fairly Likely	Not Likely	Not Sure
Over Next 3 Years Above Annual Campaign Giving's (N=17)	11.8%	11.8%	23.5%	23.5%	29.4%
Renovate/Upgrade Facility (N=17)	0%	41.2%	5.9%	29.4%	23.5%
Expand Campus (N=17)	0%	31.3%	6.3%	37.5%	25.0%
Upgrade Technology (N=17)	5.9%	17.6%	23.5%	23.5%	29.4%
Teacher Compensation and Professional Development (N=17)	11.8%	11.8%	23.5%	23.5%	29.4%
Scholarship (N=17)	11.8%	23.5%	11.8%	35.3%	17.6%
Endowment (N=17)	17.6%	23.5%	11.8%	23.5%	23.5%

Table 23: Likely Contributions – All

Funds	%
Reserve/Capital Fund (N=108)	64.8%
Scholarship Fund (N=108)	29.6%
Endowment Fund (N=108)	49.1%

Chart 9: Likely Contributions – All

**Comments:**

Reorganization of administrative roles-we all wear too many hats!

Everything except a scholarship fund seems like it should be paid for with tuition money, not additional contributions.

I believe that all are important, but I have limited funds.

Table 24: Contributions Under Reserve/Capital Fund – All

Needs	Highly Likely	Likely	Fairly Likely	Not Likely	Not Sure
Renovate/Upgrade Facility (N=112)	29.5%	26.8%	18.8%	13.4%	11.6%
Expand Campus (N=110)	7.3%	23.6%	22.7%	35.5%	10.9%
Upgrade Technology (N=110)	26.4%	24.5%	20.9%	18.2%	10.0%

Comments:

Security system is of high importance to me as far as renovations go.

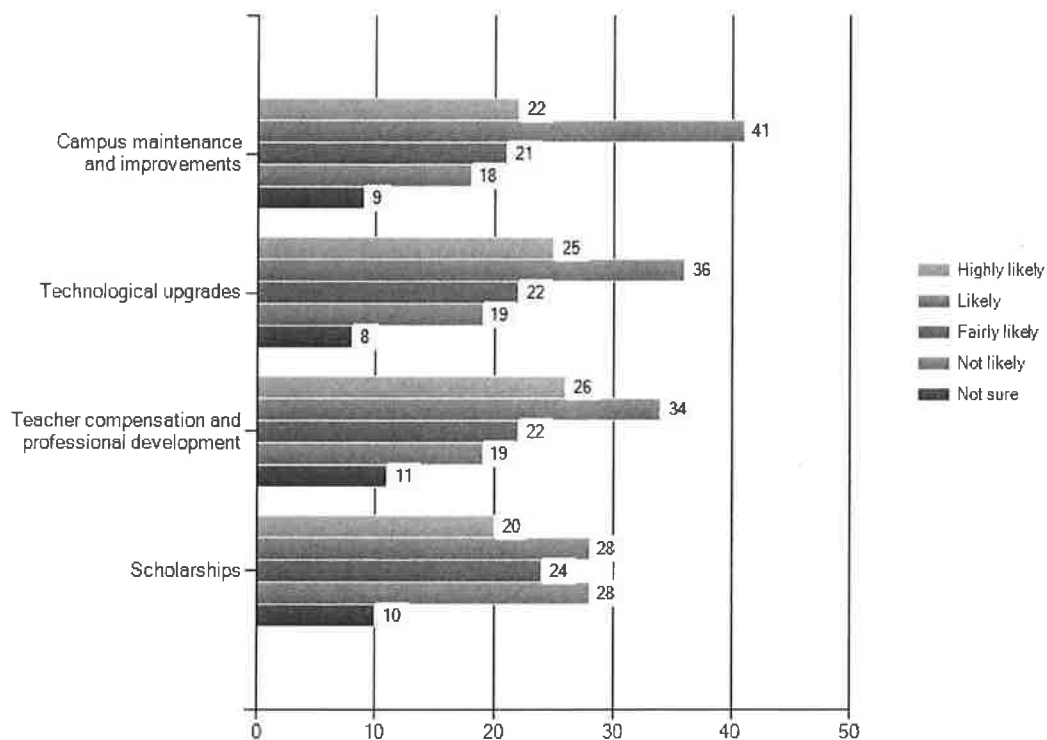
I would need further details to support an expansion project.

Table 25: Contributions Under Endowment – All

Needs	Highly Likely	Likely	Fairly Likely	Not Likely	Not Sure
Campus Maintenance (N=111)	19.8%	36.9%	18.9%	16.2%	8.1%
Technological Upgrades (N=110)	22.7%	32.7%	20.0%	17.3%	7.3%
Teachers Compensation and Professional Development (N=112)	23.2%	30.4%	19.6%	17.0%	9.8%
Scholarships (N=110)	18.2%	25.5%	21.8%	25.5%	9.1%

Chart 10: Contributions Under Endowment – All

An endowment to support continued funding of ongoing, long-term priorities, such as:



Comments:

Security system is of high importance to me as far as campus improvements go.

Table 26: Type of Resources to Contribute – All

Resource Type	%
Money – Cash/Credit Card/Check (N=103)	81.6%
EITC – Business Tax Credit (N=103)	10.7%
Stocks/Real estate/Legacy gifts/ Insurance/etc. (N=103)	1.9%
Time (N=103)	49.5%
Other (N=103)	29.1%

Comments:

I have no resources to give, but I can read to students.
Lecture a class/provide insight to important things to plan for.
I am willing to help out with planning, painting, yard work, etc. to help with improvements.
Lecture or read to students. Organize library.
Perennial fundraising.
Help fundraise.
I would be happy to help research and develop additional programs, and I could also possibly lecture a class in regard to political science or strategic planning/visioning.



Report on Results of Focus Groups and Survey Data and Next Steps

Board Retreat
November 9, 2013

By Tania Bagatova, MBA, ABD, KeyStone Research Corporation
Renée M. Lamis, Ph.D., MPA, Dynamic Visions Consulting



Focus Groups and Survey

Objective: to generate discussion about major fundraising campaign
Not a parent satisfaction survey; LRP recommends doing one next year in preparation for PAIS accreditation

- All EDS students enrolled during the 2012-13 school year in grades pre-school through 8th grade (7 sessions)
- Current and former faculty and staff (2 sessions plus written input)
- Current and former trustees (1 session)
- Current parents (3 sessions)
- Alumni and parents of alumni (1 session)
- Community leaders (1 session plus written input)

About 40 people attended and provided input during the 'adult' sessions in which donors were interspersed.

Survey responses were received from 140 people.



Survey Respondents

Role	Frequency*
Parent (includes former)	108
Faculty and Staff (includes former)	23
Alumnus/Alumna	11
Trustee (includes former)	11
Donor (includes former)	8
Grandparent	4
Community Member	9

* Total number of responses is 136.

** Does not add up to 100% as respondents were able to choose more than one role.



Survey Take-Aways

- Trustees and donors are more likely than other groups to give to the Endowment.
- Trustees and donors are also likely to donate to a Renovation of the Existing Facility.
- There is not much support for expansion.
- Growing a scholarship fund consistently came up as a lower priority.
- However, there are several people who only wanted to give to the scholarship fund.
- Goals to receive the most support: facility renovation, technological upgrade, and faculty compensation/professional development
- Give people two options: capital campaign or endowment.



Endowment

Strong support among trustees and faculty for building an endowment to fund:

- Teacher compensation and professional development
- Scholarships
- Operating reserve



Renovation

- 82% consider renovation a priority
- Security updates
- Kitchen
- Building improvements (new windows, A/C)
- Science lab
- Middle school classrooms
- Early childhood classrooms
- Update computer lab/school-wide technology improvements
- More art space



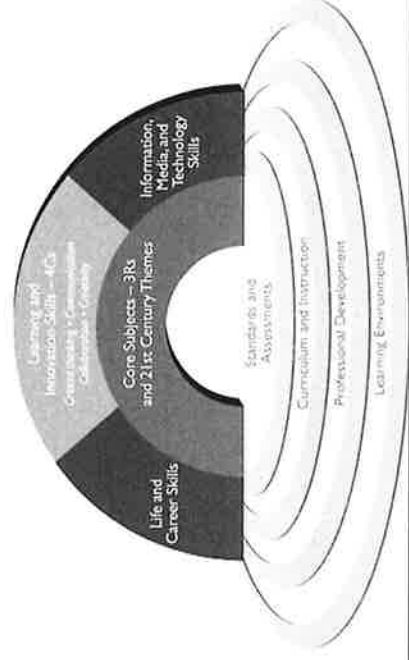
Program Input

- Participate in more community service—service learning
- Engage in more real-world experiences
- Increase hands-on experiential learning—robotics, math and science competitions, Lego league, etc.
- Hear from more professionals regarding careers and skills for success
- Strengthen foreign language
- Enhance summer program
- Student evaluation—homework, standard grading
- What is a minimum level of acceptable technology for teachers and students?



Focus on skills and values the 21st Century marketplace seeks and rewards

21st Century Student Outcomes
and Support Systems





Renovation—Big Ideas

- Need to develop a multi-year master plan for renovating and updating the campus to improve indoor learning and outdoor space and create a safe and secure campus
- Short term priorities?
- Longer-term priorities?
- Guide bids we're seeking from an architect



Five Priorities

- Upgrade the kitchen
- Improve class space
- Improve communal space
- Improve campus grounds
- Upgrade and maintain technological infrastructure



Renovate/Upgrade Kitchen

What kind of kitchen do we want/need?

- High-frequency or low-frequency use?
- Ovens or warming drawers and microwaves?
- Utilized to prepare lunches everyday like EDS did historically or is that a thing of the past?
- Staging area for events and concessions from time-to-time?



Improve Class Space

- Middle school classrooms
- Early childhood classrooms
- Science lab
- Art room
- Computer lab
- Reconfigure school to determine best use of existing space



Improve Communal Space

- Build an additional area that can serve as a multi-purpose hub for morning meetings, school plays, musical productions, movie nights, etc. with sound system and stage lights (auditorium/theatre)
- Create a larger, dedicated space for the gym
- Build a larger stage, add sound system and lights



Improve Campus Grounds

- Resurface or repurpose tennis court
- Renovate athletic fields
- Update/enlarge playgrounds
- Purchase equipment
- Landscape grounds











Technological Improvements

- What is an acceptable minimum?
- Installing/upgrading school-wide technology improvements
- Ensuring teachers have technology to enhance learning—Smart Boards and projectors, computers, hand-held devices
- Expanding tech to middle school students (hand-held devices)



Prioritization

- 1). Rank order top five priorities (1 being your highest priority and 5 being your lowest)
 - Green (1st) 
 - Yellow (2nd) 
 - Red (3rd) 
 - Blue (4th) 
 - Orange (5th) 
- 2). Vote within priorities
 - Immediate (0-2 years)—5 green dots 
 - Short-term (3-5 years)—7 yellow dots 
 - Long-term (6-10 years)—8 red dots 



Erie Day School

Igniting passion for learning

STRATEGIC PLAN, May 2013

PROGRAMMATIC SUSTAINABILITY (Education): *Focus on the skills and values the 21st century marketplace seeks and rewards.*

1. Maintain a challenging and rigorous curriculum, ensure best practice models of educating children are employed, and integrate the use of technology throughout the school.

- 1.1 Prioritize 21st century skills and ensure they are integrated into the curriculum (Program + HOS + Faculty)
- 1.2 Identify technology needs and proactively budget for upgrades (Program)
- 1.3 Establish self-study work group in preparation for PAIS accreditation. The group should be comprised of administration, faculty, trustees, and parents. (HOS)
- 1.4 Ensure policies regarding student safety and programs regarding student health and wellness are in place, updated regularly, and practiced consistently. (BOT, HOS)

2. Continue to attract and retain an excellent faculty and demonstrate a strong commitment to professional development

- 2.1. Conduct regular/annual faculty and staff evaluations (HOS)
- 2.2. Ensure 4-6 professional development sessions are conducted annually. (HOS)
- 2.3. Invest in more professional development opportunities for teachers and administration
- 2.3. Review recruitment and hiring policies (Program + HOS)
- 2.4. Review faculty/staff salaries; establish benchmarks for improving compensation where needed. (Finance + HOS)

3. To improve global awareness, provide opportunities for students to learn and experience the world beyond their daily environment

- 3.1. Establish goals for a world languages program that include hiring additional language faculty for 2013-2014 (Program + HOS)
- 3.2. Establish a more formal program for service learning in lower and middle schools. (HOS+ Faculty)
- 3.3. Ensure curricular and extra-curricular activities promote diversity and global learning. (HOS+Faculty)

4. Promote environmental sustainability through the institution and find ways to be greener and less wasteful.

- 4.1. Establish an EDS "Green Team" (HOS + Faculty)



Erie Day School *Igniting passion for learning.*

DEMOGRAPHIC SUSTAINABILITY (Enrollment): Increase enrollment and support the many aspects of diversity in the EDS community.

- 1. Increase EDS enrollment and reach full capacity of 162 students (18 per grade K-8).**
 - 1.1. Hire Admissions Director
(Finance + HOS)
 - 1.2. Ensure formal efforts are in place to enroll early childhood learning students into lower school.
(HOS + Staff)
 - 1.3. Develop an internal marketing plan to involve current families and alumni in the promotion of the school
(HOS + Staff)
 - 1.4. Implement an external marketing plan to increase brand awareness and bring more prospective families and students to campus.
(Development/Marketing + HOS + Staff)
- 2. Adopt a plan to attract and sustain a diverse profile of students and a program of tuition pricing that appropriately removes barriers to enrollment.**
 - 2.1. To improve long-term enrollment, regularly conduct a parent satisfaction survey and evaluate what is most important to prospective families.
(LRP)
 - 2.2. Establish an affordability and accessibility framework.
(LRP + Finance + HOS)
 - 2.3. Develop a financial plan that can support fair and equitable participation in after-school activities.
(Finance + HOS)

FINANCIAL SUSTAINABILITY (Finance and Philanthropy): Efficiently manage resources and raise revenues through the development of diverse income sources.

- 1. Continue to provide sound financial oversight in the present while planning for the school's future needs.**
 - 1.1. Approve the annual school budget and audit.
 - 1.2. Evaluate the current financial model and regularly update all budgeting assumptions.
 - 1.3. Plan for upgrades to the EDS campus by identifying capital costs for improvements and articulating a feasible timeline for completion.
(FINANCE, B+G, HOS)



Erie Day School

Igniting passion for learning

2. Adopt a comprehensive, multi-dimensional plan for developing and sustaining non-tuition revenue.

- 2.1. Conduct an internal feasibility study for a capital campaign in 2014 that would address building needs, technology, and endowment.
(MARKETING/DEVELOPMENT)
- 2.2. Diversify fund development, especially major gifts and planned giving, to reduce reliance on annual fundraising
(MARKETING/DEVELOPMENT)

LEADERSHIP SUSTAINABILITY (Governance): Ensure appropriate leadership is in place to guide Erie Day School into the future.

1. Trustees will strive for effective governance

- 1.1. Maintain an updated profile of Trustees and identify areas of need. (COT)
- 1.2. Ensure committees have strong leadership and diverse members including representatives from key constituencies such as teachers and parents. (COT)
- 1.3. Develop succession plans for board officers and committee chairs. (COT)
- 1.4. Annually evaluate board performance (COT)

2. Trustees will increase communication with core constituencies including faculty and parents.

- 3.1. Involve faculty on board committees (COT)
- 3.2. Meet regularly with faculty to communicate goals and objectives (BOT, Chair and Executive Committee)
- 3.3. Submit regular updates regarding strategic plan progress to faculty and parents. (LRP)