COMMONWEALTH OF VIRGINIA
# County of Henrico

### Non-Professional Services Contract
### Contract No. 2626A

This Non-Professional Contract (this "Contract") entered into this 14ᵗʰ day of May 2024, Children's Literacy Initiative (the "Contractor") and the County School Board of Henrico County, Virginia ("HCPS").

**WHEREAS** HCPS has awarded the Contractor this Contract pursuant to Request for Proposals No. 24-2626-1JL, as modified by Addendum No. 1 (the "Request for Proposals"), for coaching services for elementary schools teachers.

**WITNESSETH** that the Contractor and HCPS, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

**SCOPE OF CONTRACT:** The Contractor shall provide the services to HCPS as set forth in the Contract Documents.

**COMPENSATION:** The compensation HCPS will pay to the Contractor under this Contract shall be:

| Description | Price |
|---|---|
| Coaching Services to include 4 days of Discovery, 1 day of strategic planning, weekly onsite days and a stepback onsite or **OR variable on-demand services** | $ 1,667/onsite day |
| Coaching Services with guaranteed 35 onsite days to include 4 days of Discovery, 1 day of strategic planning, weekly onsite days and a stepback onsite | $1,575/onsite day or $265/virtual coaching session hour |
| Coaching Services for days over 35 onsite days | $1,445/day or $265 per virtual coaching session hour |
| Coaching Services with guaranteed full contract of 40 hours for 30 weeks | $1,445/onsite day or $240 per/virtual coaching session hour |
| Seminar | $11,500/full day |
| Seminar | $7,590/half day |

**CONTRACT TERM:** The Contract term shall be for a period of One year from date of execution. HCPS may renew the Contract for up to four one-year terms giving 30 days' written notice before the end of the term unless Contractor has given HCPS written notice that it does not wish to renew at least 90 days before the end of the term.

**CONTRACT DOCUMENTS:** This Contract hereby incorporates by reference the documents listed below (the "Contract Documents") which shall control in the following descending order:

1. This Non-Professional Services Contract between HCPS and Contractor.
2. The General Contract Terms and Conditions included in the Request for Proposals.
3. Virginia School Data Privacy Agreement (Exhibit A)

4. Contractor's Best and Final Offer dated April 8, 2024 (Exhibit B).
5. Contractor's Original Proposal dated January 24, 2024 (Exhibit C).
6. The Scope of Services included in the Request for Proposals.

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound hereby.

Children's Literacy Initiative

990 Spring Garden Street Suite 400
Philadelphia, PA 19123

Diana Greene (May 29, 2024 10:51 EDT)
_____
Signature

Diana Greene
_____
Printed Name and Title

05/29/24
_____
Date

County School Board of Henrico County, Virginia
406 Dabbs House Road
Henrico, VA 23223

_____
Signature

Oscar Knott, CPP, CPPO, VCO
_____
Purchasing Director

07/01/2024
_____
Date

APPROVED AS TO FORM

6-26-24
Assistant County Attorney

# Contract #2626A (1) 1-2

Final Audit Report                                                                 2024-05-29

| | |
|---|---|
| Created: | 2024-05-29 |
| By: | Sonita Thompson (sthompson@cli.org) |
| Status: | Signed |
| Transaction ID: | CBJCHBCAABAACPXK1gwknibI-cMhX81ecZ9S5v6VVIfZ |

## "Contract #2626A (1) 1-2" History

📄 Document created by Sonita Thompson (sthompson@cli.org)
2024-05-29 - 2:50:19 PM GMT

✉️ Document emailed to Diana Greene (dgreene@cli.org) for signature
2024-05-29 - 2:50:23 PM GMT

📄 Email viewed by Diana Greene (dgreene@cli.org)
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✍️ Document e-signed by Diana Greene (dgreene@cli.org)
Signature Date: 2024-05-29 - 2:51:59 PM GMT - Time Source: server

✅ Agreement completed.
2024-05-29 - 2:51:59 PM GMT

# VIRGINIA SCHOOL DATA PRIVACY AGREEMENT

This Virginia School Data Privacy Agreement ("DPA") is entered into by and between the

County School Board of Henrico County, Virginia (hereinafter referred to as "Division") and

Children's Literacy Initiative (hereinafter referred to as "Provider") on

May 23, 2024 The Parties agree to the terms as stated herein.

## RECITALS

**WHEREAS,** the Provider has agreed to provide the Division with certain digital educational services ("Services") as described in Article I and Exhibit "A"; and

**WHEREAS,** in order to provide the Services described in Article 1 and Appendix A, the Provider may receive or create and the Division may provide documents or data that are covered by several federal statutes, among them, the Federal Educational Rights and Privacy Act ("FERPA") at 20 U.S.C. 1232g and 34 CFR Part 99, Children's Online Privacy Protection Act ("COPPA"), 15 U.S.C. 6501-6502; Protection of Pupil Rights Amendment ("PPRA") 20 U.S.C. 1232h; the Individuals with Disabilities Education Act ("IDEA"), 20 U.S.C. §§ 1400 et. seq.; and

**WHEREAS,** the documents and data transferred from Virginia Divisions and created by the Provider's Services are also subject to several Virginia student privacy laws, including Code of Virginia § 22.1-289.01. *School service providers; school-affiliated entities; student personal information*; and § 22.1-287.02. *Students' personally identifiable information*.

**WHEREAS,** the Parties wish to enter into this DPA to ensure that the Services provided conform to the requirements of the privacy laws referred to above and to establish implementing procedures and duties.

**WHEREAS,** the Provider may, by signing the "General Offer of Privacy Terms" (Exhibit "E"), agree to allow other Local Educational Agencies (LEAs) in Virginia the opportunity to accept and enjoy the benefits of this DPA for the Services described herein, without the need to negotiate terms in a separate DPA.

**NOW THEREFORE,** for good and valuable consideration, the parties agree as follows:

## ARTICLE I: PURPOSE AND SCOPE

**1.** **Purpose of DPA**. The purpose of this DPA is to describe the duties and responsibilities to protect Division Data (as defined in Exhibit "C") transmitted to Provider from the Division pursuant to Exhibit "A", including compliance with all applicable state privacy statutes, including the FERPA, PPRA, COPPA, IDEA, and Code of Virginia § 22.1-289.01. School service providers; school-affiliated entities; student personal information; and § 22.1-287.02. Students' personally identifiable information. In performing these services, to the extent Personally Identifiable Information (as defined in Exhibit "C") from Pupil Records (as defined in Exhibit "C") are transmitted to Provider from Division, the Provider shall be considered a School Official with a legitimate educational interest, and performing services otherwise provided by the Division. Provider shall be under the direct control and supervision of the Division.

**2.** **Nature of Services Provided**. The Provider has agreed to provide the following digital educational services described below and as may be further outlined in Exhibit "A" hereto:

# VIRGINIA SCHOOL DATA PRIVACY AGREEMENT

Teacher and Leader coaching services((In person and virutal) and Professional
Development trainings/seminars.

3.    **Division Data to Be Provided**. In order to perform the Services described in this Article and Exhibit "A", Provider shall list the categories of data collected, managed or shared as described below or as indicated in the Schedule of Data, attached hereto as Exhibit "B":

Demographic data (student and teacher), student performance/assessment data, school
climate and culture data, teacher curriculum and materials.

4.    **DPA Definitions**. The definition of terms used in this DPA is found in Exhibit "C". In the event of a conflict, definitions used in this DPA shall prevail over terms used in all other writings, including, but not limited to, a service agreement, privacy policies or any terms of service.

## ARTICLE II: DATA OWNERSHIP AND AUTHORIZED ACCESS

1.  **Division Data Property of Division**. All Division Data, user generated content or any other Pupil Records transmitted to the Provider pursuant to this Agreement is and will continue to be the property of and under the control of the Division, or to the party who provided such data (such as the student, in the case of user generated content.). The Provider further acknowledges and agrees that all copies of such Division Data or any other Pupil Records transmitted to the Provider, including any modifications or additions or any portion thereof from any source, are also subject to the provisions of this Agreement in the same manner as the original Division Data or Pupil Records. The Parties agree that as between them, all rights, including all intellectual property rights in and to Division Data or any other Pupil Records contemplated per this Agreement shall remain the exclusive property of the Division. For the purposes of FERPA and state law, the Provider shall be considered a School Official, under the control and direction of the Divisions as it pertains to the use of Division Data notwithstanding the above. The Provider will cooperate and provide Division Data within ten (10) days at the Division's request. Provider may transfer pupil-generated content to a separate account, according to the procedures set forth below.

2.  **Parent Access**. Provider shall cooperate and respond within ten (10) days to the Division's request for personally identifiable information in a pupil's records held by the Provider to view or correct as necessary. In the event that a parent of a pupil or other individual contacts the Provider to review any of the Pupil Records of Division Data accessed pursuant to the Services, the Provider shall refer the parent or individual to the Division, who will follow the necessary and proper procedures regarding the requested information.

3.  **Separate Account**. Provider shall, at the request of the Division, transfer Student Generated Content to a separate student account when required by the Code of Virginia § 22.1-289.01. School service providers; school-affiliated entities.

4.  **Third Party Request**. Provider shall notify the Division in advance of a compelled disclosure to a Third Party, unless legally prohibited.

5. **Subprocessors**. Provider shall enter into written agreements with all Subprocessors performing functions pursuant to this DPA, whereby the Subprocessors agree to protect Division Data in manner consistent with the terms of this DPA.

## ARTICLE III: DUTIES OF DIVISION

1. **Privacy Compliance**. Division shall provide data for the purposes of the DPA and any related contract in compliance with the FERPA, PPRA, IDEA, Code of Virginia § 22.1-289.01. School service providers; school-affiliated entities; student personal information; and § 22.1-287.02. Students' personally identifiable information, and all other applicable Virginia statutes.

2. **Parent Notification of Rights** Division shall ensure that its annual notice under FERPA defines vendors, such as the Provider, as "School Officials" and what constitutes a legitimate educational interest. The Division will provide parents with a notice of the websites and online services under this agreement for which it has consented to student data collection to on behalf of the parent, as permitted under COPPA

3. **Unauthorized Access Notification**. Division shall notify Provider promptly of any known or suspected unauthorized access. Division will assist Provider in any efforts by Provider to investigate and respond to any unauthorized access.

## ARTICLE IV: DUTIES OF PROVIDER

1) **Privacy Compliance**. The Provider shall comply with all Virginia and Federal laws and regulations pertaining to data privacy and security, including FERPA, COPPA, PPRA, Code of Virginia § 22.1-289.01. and § 22.1-287.02.

2) **Authorized Use**. Division Data shared pursuant to this DPA, including persistent unique identifiers, shall be used for no purpose other than the Services stated in this DPA and as authorized under the statutes referred to in subsection (1), above. Provider also acknowledges and agrees that it shall not make any re-disclosure of any Division Data or any portion thereof, including without limitation, any Division Data, metadata, user content or other non-public information and/or personally identifiable information contained in the Division Data, without the express written consent of the Division, unless it fits into the de-identified information exception in Article IV, Section 4, or there is a court order or lawfully issued subpoena for the information.

3) **Employee Obligations**. Provider shall require all employees and agents who have access to Division data to comply with all applicable provisions of this DPA with respect to the data shared under the Service Agreement.

4) **Use of De-identified Information**. De-identified information, as defined in Exhibit "C", may be used by the Provider for the purposes of development, research, and improvement of educational sites, services, or applications, as any other member of the public or party would be able to use de-identified data pursuant to 34 CFR 99.31(b). The Provider and Division agree that the Provider cannot successfully de-identify information if there are fewer than twenty (20) students in the samples of a particular field or category of information collected, i.e., twenty students in a particular grade, twenty students of a particular race, or twenty students with a particular disability. Provider agrees not to attempt to re-identify de-identified Division Data and not to transfer de-identified Division Data to any party unless (a) that party agrees in writing not to attempt re-identification, and (b) prior written

notice has been given to the Division who has provided prior written consent for such transfer.

5) **Disposition of Data**. Upon written request and in accordance with the applicable terms in subsections below, provider shalt dispose or delete all division data obtained under this agreement when it is no longer needed for the purposes for which it was obtained. Disposition will include (1) the shredding of any hard copies of any Division data, (2) erasing, or (3) otherwise modifying the personal information in those records to make it unreadable or indecipherable by human or digital means. Nothing in the service agreement authorizes provider to maintain Division data obtained under the service agreement beyond the time reasonably needed to complete the disposition. Provider shall provide written notification when the division data has been disposed. The duty to dispose of Division data shall not extend to data that has been de-identified or placed in a separate student account, pursuant to the terms of the agreement. The division may employ a request for return or deletion of Division data form, a copy of which is attached hereto as exhibit D. Upon receipt of a request from the division, the provider will immediately provide the division with any specified portion of the division data within ten (10) calendar days of the receipt of said request.

   a) **Partial Disposal During the Term of Service Agreement**. Throughout the term of the service agreement, Division may request partial disposal of Division data obtained under the service agreement that is no longer needed. Partial disposal of data shall be subject to Division's request to transfer data to a separate account, pursuant to Article II Section 3, above.

   b) **Complete Disposal upon Termination of Service Agreement**. Upon termination of the service agreement provider shall dispose or securly destroy all division data obtained under the service agreement. Prior to disposal of the data, provider shall notify Division in writing of it option to transfer data to a separate account, pursuant to Article 2, Section 3, above. In new event shelters provider dispose of data pursuant to this provision unless and until provider has received affirmative written confirmation from Division that data will not be transferred to a separate account.

6) **Advertising Prohibition**. Provider is prohibited from using or selling Division Data to (a) market or advertise to students or families/guardians; (b) inform, influence, or enable marketing or advertising efforts by a Provider; (c) develop a profile of a student, family member/guardian or group, for any commercial purpose other than providing the Service to Client; or (d) use the Division Data for the development of commercial products or services, other than as necessary to provide the Service to Client. This section does not prohibit Provider from generating legitimate personalized learning recommendations or other activities permitted under Code of Virginia § 22.1-289.01.

7) **Penalties.** The failure to comply with the requirements of this agreement could subject Provider and any third party to all allowable penalties assessable against Provider under state and federal law. In the event the Family Policy Compliance Office of the U.S. Department of Education determines that Provider improperly disclosed personally identifiable information obtained from the Division's education records, the Division may not allow Provider access to the Division's education records for at least five years.

# VIRGINIA SCHOOL DATA PRIVACY AGREEMENT

## ARTICLE V: DATA PROVISIONS

1. **Data Security**. The Provider agrees to maintain a comprehensive information security program that is reasonably designed to protect the security, privacy, confidentiality, and integrity of student personal information and makes use of appropriate administrative, technological, and physical safeguards. The general security duties of Provider are set forth below. These duties shall include, but are not limited to:

    a. **Passwords and Employee Access**. Provider shall secure and manage usernames, passwords, and any other means of gaining access to the Services or to Division Data, at levels suggested by NIST SP800-171 (Password complexity, encryption, and re-use) , NIST SP800-53 (IA control Family), and NIST 800-63-3 (Digital Identity), and NIST SP800-63B (Authenticator and Verifier Requirements) or equivalent industry best practices.

    b. **Security Protocols**. Both parties agree to maintain security protocols that meet industry best practices in the collection, storage or transmission of any data, including ensuring that data may only be viewed or accessed by parties legally allowed to do so. Provider shall maintain all data obtained or generated pursuant to the DPA in a secure computer environment.

    c. **Provider Employee Training**. The Provider shall provide annual security training to those of its employees who operate or have access to the system.

    d. **Security Technology**. When the service is accessed using a supported web browser, FIPS 140-2 validated transmission encryption protocols, or equivalent technology shall be employed to protect data from unauthorized access. The service security measures shall follow National Institute of Standards and Technology (NIST) 800-171, or equivalent industry best practices.

    e. **Periodic Risk Assessment**. Provider further acknowledges and agrees to conduct periodic risk assessments and remediate any identified security and privacy vulnerabilities in a timely manner. Upon Division's written request, Service Provider shall make the results of findings available to the Division. The Division shall treat such audit reports as Provider's Confidential Information under this Agreement.

    f. **Backups and Audit Trails, Data Authenticity and Integrity**. Provider will take reasonable measures, including all backups and audit trails, to protect Division Data against deterioration or degradation of data quality and authenticity. Provider shall be responsible for ensuring that Division Data is retrievable in a reasonable format.

    g. **Subprocessors Bound**. Provider shall enter into written agreements whereby Subprocessors agree to secure and protect Division Data in a manner consistent with the terms of this Article V. Provider shall periodically conduct or review compliance monitoring and assessments of Subprocessors to determine their compliance with this Article.

2. **Unauthorized Access or Data Breach**. In the event that Division Data are reasonably believed by the Provider or  school division to have been disclosed (lost, accessed or obtained) in violation of the Family Educational Rights and Privacy Act (20 U.S.C. § 1232g) or other federal or state law

# VIRGINIA SCHOOL DATA PRIVACY AGREEMENT

applicable to such information accessed or obtained by an unauthorized individual, Provider shall follow the following process:

  **a.** provide immediate notification to Division upon verification of the incident and allow the Division or its authorized representatives to fully participate in the investigation of the incident.

  **b.** notification will be provided to the contact(s) identified in ARTICLE VII, N: Notice, and sent via email and postal mail. Such notification shall include the

      **i.** date, estimated date, or date range of the loss or disclosure;

      **i.** Division Data that was or is reasonably believed to have been lost or disclosed;

      **ii.** remedial measures taken or planned in response to the loss or disclosure.

  **c.** immediately take action to prevent further access;

  **d.** take all legally required, reasonable, and customary measures in working with Division to remediate the breach, which may include toll free telephone support with informed customer services staff to address questions by affected parties and/or provide monitoring services if necessary given the nature and scope of the loss or disclosure;

  **e.** cooperate with Division efforts to communicate to affected parties.

  **f.** provider is prohibited from directly contacting parent, legal guardian or eligible pupil unless expressly requested by Division. If Division requests Provider's assistance providing notice of unauthorized access, and such assistance is not unduly burdensome to Provider, Provider shall notify the affected parent, legal guardian or eligible pupil of the unauthorized access, which shall include the information listed in subsections (b) and (c), above. If requested by Division, Provider shall reimburse Division for costs incurred to notify parents/families of a breach not originating from Division's use of the Service.

  **g.** the Provider shall indemnify and hold harmless the Division from and against any loss, claim, cost (including attorneys' fees) or damage of any nature arising from or in connection with the breach by the Provider or any of its officers, directors, employees, agents or representatives of the obligations of the Provider's or its Authorized Representatives under this provision or under a Confidentiality Agreement, as the case may be.

## ARTICLE VI: GENERAL OFFER OF PRIVACY TERMS

The Provider may, by signing the attached Form of General Offer of Privacy Terms (General Offer attached hereto as Exhibit "E"), be bound by the terms of this DPA to any other Division who signs the acceptance in said Exhibit. The Form is limited by the terms and conditions described therein.

**A.** <u>**Term**</u>. The Provider shall be bound by this DPA for so long as the Provider maintains or posesses any Division Data.

**B.** <u>**Termination**</u>. In the event that either party seeks to terminate this DPA, they may do so by mutual written consent and as long as any service agreement or terms of service, to the extent one exists, has lapsed or has been terminated. The Division may terminate this DPA and any service agreement or contract in the event of a material breach of the terms of this DPA.

**C.** <u>**Data Transfer Upon Termination or Expiration**</u>. Provider will notify the Division of impending cessation of its business and any contingency plans. Provider shall implement its exit plan and take all necessary actions to ensure a smooth transition of service with minimal disruption to the Division. As mutually agreed upon and as applicable, Provider will work closely with its successor to ensure asuccessful transition to the new equipment, with minimal downtime and effect on the Division, all such work to be coordinated and performed in advance of the formal, transition date.

**D.** <u>**Effect of Termination Survival**</u>. If the DPA is terminated, the Provider shall destroy all of Division's data pursuant to Article V, section 5(b). The Provider's obligations under this agreement shall survive termination of this Agreement until all Division Data has been returned or Securely Destroyed.

**E.** <u>**Priority of Agreements**</u>. This DPA supersedes all end user and "click-thru" agreements. In the event there is conflict between the terms of the DPA and any other writing, such as service agreement or with any other bid/RFP, terms of service, privacy policy, license agreement, or writing, the terms of this DPA shall apply and take precedence. Except as described in this paragraph herein, all other provisions of any other agreement shall remain in effect.

**F.** <u>**Amendments**</u>: This DPA may be amended and the observance of any provision of this DPA may be waived (either generally or in any particular instance and either retroactively or prospectively) only with the signed written consent of both parties

**G.** <u>**Severability**</u>. Any provision of this DPA that is prohibited or unenforceable in any jurisdiction shall, as to such jurisdiction, be ineffective to the extent of such prohibition or unenforceability without invalidating the remaining provisions of this DPA, and any such prohibition or unenforceability in any jurisdiction shall not invalidate or render unenforceable such provision in any other jurisdiction. Notwithstanding the foregoing, if such provision could be more narrowly drawn so as not to be prohibited or unenforceable in such jurisdiction while, at the same time, maintaining the intent of the parties, it shall, as to such jurisdiction, be so narrowly drawn without invalidating the remaining provisions of this DPA or affecting the validity or enforceability of such provision in any other jurisdiction.

**H.** <u>**Governing Law; Venue and Jurisdiction**</u>. This agreement will be governed by and construed in accordance with the laws of the state of Virginia, without regard to conflicts of law principles. Each party consents and submits to the sole and exclusive jurisdiction to the state and federal courts for the county of the initial subscribing division or the division specified in exhibit E as applicable, for any dispute arising out of or relating to this agreement or the transactions contemplated hereby.

**I.** <u>**Authority.**</u> Provider represents that it is authorized to bind to the terms of this Agreement, including

confidentiality and destruction of Division Data and any portion thereof contained therein, all related or associated institutions, individuals, employees or contractors who may have access to the Division Data and/or any portion thereof, or may own, lease or control equipment or facilities of any kind where the Division Data and portion thereof stored, maintained or used in any way.

**J.** <u>**Waiver**</u>. No delay or omission of the Division to exercise any right hereunder shall be construed as a waiver of any such right and the Division reserves the right to exercise any such right from time to time, as often as may be deemed expedient.

**K.** <u>**Successors Bound:**</u> This DPA is and shall be binding upon the respective successors in interest to provider in the event of a merger, acquisition, consolidation or other business reorganization or sale of all or substantially all of the assets of such business.

**L.** <u>**Electronic Signature:**</u> The parties understand and agree that they have the right to execute this Agreement through paper or through electronic signature technology, which is in compliance with Virginia and Federal law governing electronic signatures. The parties agree that to the extent they sign electronically, their electronic signature is the legally binding equivalent to their handwritten signature. Whenever they execute an electronic signature, it has the same validity and meaning as their handwritten signature.

**M.** <u>**Notice**</u>. All notices or other communication required or permitted to be given hereunder must be in writing and given by personal delivery, facsimile or e-mail transmission (if contact information is provided for the specific mode of delivery), or first class mail, postage prepaid, sent to the designated representatives before:

    **a. Designated Representatives**

    The designated representative for the Provider for this Agreement is:

| | |
|---|---|
| Name: | Anthony Miller |
| Title: | Senior Manager of Technology |
| Address: | 990 Spring Garden Street, Philadelphia, PA |
| eMail: | Anmiller@cli.org |
| Phone: | |

    The designated representative for the Division for this Agreement is:

| | |
|---|---|
| Name: | Brian Maddox |
| Title: | Director of Technology |
| Address: | 3820 Nine Mile Road, Henrico VA |
| eMail: | bemaddox@henrico.k12.va.us |
| Phone: | 804-328-5200 |

    **b. Notification of Acceptance of General Offer of Terms.** Upon execution of Exhibit E General Offer of Terms, subscribing Division shall provide notice of such acceptance in writing and given by personal delivery or email transmission (if contact information

# VIRGINIA SCHOOL DATA PRIVACY AGREEMENT

is provided for the specific mode of delivery), or first-class mail, postage prepaid, to the designated representative below the designated representative for the notice of acceptance of the general offer of privacy terms is named title contact information.

| | |
|---|---|
| Name: | Sonita Thompson |
| Title: | Chief of Staff |
| Address: | 990 Spring Garden Street, Philadelphia, PA |
| eMail: | Sthompson@cli.org |
| Phone: | (267) 277-7795 |

[*Signature Page Follows*]

# VIRGINIA SCHOOL DATA PRIVACY AGREEMENT

**IN WITNESS WHEREOF,** the parties have executed this Virginia Student Data

Privacy Agreement as of the last day noted below.

Provider Signature  *Sonita Thompson*

Date:   May 23, 2024

Printed Name:   Sonita Thompson

Title:   Chief of Staff

Division Signature

Date:   07/01/2024

Printed Name:   Oscar Knott

Title:   Purchasing Director

# VIRGINIA SCHOOL DATA PRIVACY AGREEMENT

## EXHIBIT "A"

### DESCRIPTION OF SERVICES

[INSERT DETAILED DESCRIPTION OF PRODUCTS AND SERVICES HERE. IF MORE THAN ONE PRODUCT OR SERVICE IS INCLUDED, LIST EACH PRODUCT HERE]

In person and virtual teacher and leader coaching, and literacy professional development training and seminars.  See Contract #2626A, Exhibit C  - CLI's original proposal.

# VIRGINIA SCHOOL DATA PRIVACY AGREEMENT

## EXHIBIT "B"

### SCHEDULE OF DATA

| Category of Data | Elements | Check if used by your system |
|---|---|---|
| Application Technology Meta Data | IP Addresses of users, Use of cookies etc. | ☑ |
| | Other application technology meta data-Please specify: | ☐ |
| Application Use Statistics | Meta data on user interaction with application | ☐ |
| Assessment | Standardized test scores | ☑ |
| | Observation data | ☐ |
| | Other assessment data-Please specify: | ☑ |
| Attendance | Student school (daily) attendance data | ☑ |
| | Student class attendance data | ☑ |
| Communications | Online communications that are captured (emails, blog entries) | ☐ |

| | | |
|---|---|---|
| Conduct | Conduct or behavioral data | ☑ |
| | | ☐ |
| Demographics | Date of Birth | ☐ |
| | Place of Birth | ☐ |
| | Gender | ☐ |
| | Ethnicity or race | ☑ |
| | Language information (native, preferred or primary language spoken by student) | ☑ |
| | Other demographic information-Please specify: | ☑ |
| Enrollment | Student school enrollment | ☑ |
| | Student grade level | ☑ |
| | Homeroom | ☐ |
| | Guidance counselor | ☐ |
| | Specific curriculum programs | ☐ |
| | Year of graduation | ☐ |
| | Other enrollment information-Please specify: | ☐ |
| Parent/Guardian Contact Information | Address | ☐ |
| | Email | ☐ |
| | Phone | ☐ |

# VIRGINIA SCHOOL DATA PRIVACY AGREEMENT

| | | | | | |
|---|---|---|---|---|---|
| Parent/ Guardian ID | Parent ID number (created to link parents to students) | ☐ | | number | |
| | | | | State ID number | ☐ |
| Parent/ Guardian Name | First and/or Last | ☐ | | Provider/App assigned student ID number | ☐ |
| Schedule | Student scheduled courses | ☑ | | Student app username | ☐ |
| | Teacher names | ☑ | | Student app passwords | ☐ |
| | | | Student Name | First and/or Last | ☐ |
| Special Indicator | English language learner information | ☑ | Student In App Performance | Program/appli-cation performance (typing program-student types 60 wpm, reading program-student reads below grade level) | ☑ |
| | Low income status | ☑ | | | |
| | Medical alerts /health data | ☐ | | | |
| | Student disability information | ☐ | | | |
| | Specialized education services (IEP or 504) | ☑ | Student Program Membership | Academic or extracurricular activities a student may belong to or participate in | ☐ |
| | Living situations (homeless/ foster care) | ☐ | | | |
| | Other indicator information-Please specify: | ☐ | Student Survey Responses | Student responses to surveys or questionnaires | ☐ |
| Student Contact Information | Address | ☐ | | | |
| | Email | ☐ | Student work | Student generated content; writing, pictures etc. | ☑ |
| | Phone | ☐ | | | |
| Student Identifiers | Local (School district) ID | ☐ | | Other student | ☐ |

# VIRGINIA SCHOOL DATA PRIVACY AGREEMENT

| Transcript | work data - Please specify: | ☐ |
|---|---|---|
| | Student course grades | ☐ |
| | Student course data | ☐ |
| | Student course grades/perfor-mance scores | ☐ |
| | Other transcript data -Please specify: | ☐ |
| Transportation | Student bus assignment | ☐ |
| | Student pick up and/or drop off location | ☐ |
| | Student bus card ID number | ☐ |

| | Other transportation data -Please specify: | ☐ |
|---|---|---|
| Other | Please list each additional data element used, stored or collected by your application | ☐ |

No Student Data Collected at this time ☐ .
*Provider shall immediately notify LEA if this designation is no longer applicable.

OTHER: Use this box, if more space needed.

CLI is requesting, and Partner shall provide, student level longitudinal data (i.e., multiple administrations of the same assessment, where available to track growth) at mid-year (after mid-year assessments) and end of year. CLI is requesting, and Partner shall provide, prior year data and current year data, as applicable, at mid-year and end of year, including the following variables:
1) School variables
a. Grade
b. School
c. Teacher (names and email addresses)
2) Demographics/student characteristics
a. Student race/ethnicity
b. Student sex
c. Student SES
i. Free/reduced lunch
ii. Other socioeconomic variables, if available
d. Student ELL (and/or bilingual) status
e. Student IEP status
f. Student attendance
g. Student disciplinary data
i. Suspensions
ii. Referrals
3) Local and state literacy assessments (all administrations)

# VIRGINIA SCHOOL DATA PRIVACY AGREEMENT

## EXHIBIT "C"
### DEFINITIONS

**Data Breach** means an event in which Division Data is exposed to unauthorized disclosure, access, alteration or use.

**Division Data** includes all business, employment, operational and Personally Identifiable Information that Division provides to Provider and that is not intentionally made generally available by the Division on public websites or publications, including but not limited to business, administrative and financial data, intellectual property, and student, employees, and personnel data, user generated content and metadata but specifically excludes Provider Data (as defined in the Contract).

**De-Identifiable Information (DII):** De-Identification refers to the process by which the Provider removes or obscures any Personally Identifiable Information ("PII") from student records in a way that removes or minimizes the risk of disclosure of the identity of the individual and information about them. Anonymization or de-identification should follow guidance equivalent to that provided by U.S Department of Education publication "Data De-identification: An Overview of Basic Terms" or NISTIR Special Publication (SP) 8053 De-Identification of Personally Identifiable Information. The Provider's specific steps to de-identify the data will depend on the circumstances, but should be appropriate to protect students. Some potential disclosure limitation methods are blurring, masking, and perturbation. De-identification should ensure that any information when put together cannot indirectly identify the student, not only from the viewpoint of the public, but also from the vantage of those who are familiar with the individual. Information cannot be de-identified if there are fewer than twenty (20) students in the samples of a particular field or category, i.e., twenty students in a particular grade or less than twenty students with a particular disability.

**Indirect Identifiers:** Any information that, either alone or in aggregate, would allow a reasonable person to be able to identify a student to a reasonable certainty

**Personally Identifiable Information (PII):** The terms "Personally Identifiable Information" or "PII" shall include, but are not limited to, student data, staff data, parent data, metadata, and user or pupil-generated content obtained by reason of the use of Provider's software, website, service, or app, including mobile apps, whether gathered by Provider or provided by Division or its users, students, or students' parents/guardians, including "directory information" as defined by §22.1-287.1 of the Code of Virginia".

PII includes, without limitation, at least the following:

- Staff, Student or Parent First, Middle and Last Name
- Staff, Student or Parent Telephone Number(s)
- Discipline Records
- Special Education Data
- Grades
- Criminal Records

- Health Records
- Biometric Information
- Socioeconomic Information
- Political Affiliations
- Text Messages
- Student Identifiers Photos
- Videos
- Grade
- Home Address Subject
- Email Address
- Test Results
- Juvenile Dependency Records Evaluations
- Medical Records
- Social Security Number
- Disabilities
- Food Purchases
- Religious Information Documents
- Search Activity
- Voice Recordings
- Date of Birth
- Classes
- Information in the Student's Educational Record
- Information in the Student's Email

**Provider:** For purposes of the DPA, the term "Provider" means provider of digital educational software or services, including cloud-based services, for the digital storage, management, and retrieval of pupil records.

**Pupil Generated Content:** The term "pupil-generated content" means materials or content created by a pupil during and for the purpose of education including, but not limited to, essays, research reports, portfolios, creative writing, music or other audio files, photographs, videos, and account information that enables ongoing ownership of pupil content.

**Pupil Records:** Means both of the following: (1) Any information that directly relates to a pupil that is maintained by Division and (2) any information acquired directly from the pupil through the use of instructional software or applications assigned to the pupil by a teacher or other local educational Division employee.

**Securely Destroy:** Securely Destroy: Securely Destroy means taking actions that render data written on physical (e.g., hardcopy, microfiche, etc.) or electronic media unrecoverable by both ordinary and extraordinary means. These actions must meet or exceed those sections of the National Institute of Standards of Technology (NIST) SP 800-88 Appendix A guidelines relevant to sanitization of data categorized as high security. All attempts to overwrite magnetic data for this purpose must utilize DOD approved methodologies.

**School Official**: For the purposes of this Agreement and pursuant to 34 CFR 99.31 (B), a School Official is a contractor that: (1) Performs an institutional service or function for which the agency or institution would otherwise use employees; (2) Is under the direct control of the agency or institution with respect to the use and maintenance of education

records; and (3) Is subject to 34 CFR 99.33(a) governing the use and re-disclosure of personally identifiable information from student records.

**Student Data:** Student Data includes any data, whether gathered by Provider or provided by Division or its users, students, or students' parents/guardians, that is descriptive of the student including, but not limited to, information in the student's educational record or email, first and last name, home address, telephone number, email address, or other information allowing online contact, discipline records, videos, test results, special education data, juvenile dependency records, grades, evaluations, criminal records, medical records, health records, social security numbers, biometric information, disabilities, socioeconomic information, food purchases, political affiliations, religious information text messages, documents, student identifies, search activity, photos, voice recordings or geolocation information.

Student Data shall constitute Pupil Records for the purposes of this Agreement, and for the purposes of Virginia and Federal laws and regulations. Student Data as specified in <u>Exhibit B</u> is confirmed to be collected or processed by the Provider pursuant to the Services. Student Data shall not constitute that information that has been anonymized or de-identified, or anonymous usage data regarding a student's use of Provider's services. Anonymization or de-identification should guidance equivalent to that provided by U.S Department of Education publication "Data De-identification: An Overview of Basic Terms" or NISTIR Special Publication (SP) 8053 De-Identification of Personally Identifiable Information.

**Student Generated Content:** Alternatively known as user-created content (UCC), is any form of content, such as images, videos, text and audio, that have been created and posted by student users on online platforms.

**Subscribing Division**: A Division that was not party to the original Services Agreement and who accepts the Provider's General Offer of Privacy Terms.

**Subprocessor:** For the purposes of this Agreement, the term "Subprocessor" (sometimes referred to as the "Subcontractor") means a party other than Division or Provider, who Provider uses for data collection, analytics, storage, or other service to operate and/or improve its software, and who has access to PII.

**Third Party**: The term "Third Party" means an entity that is not the Provider or Division.

# VIRGINIA SCHOOL DATA PRIVACY AGREEMENT

## EXHIBIT "D"

## DIRECTIVE FOR DISPOSITION OF DATA

[Name or Division or Division] directs [Name of Company] to dispose of data obtained by Provider pursuant to the terms of the DPA between Division and Provider. The terms of the Disposition are set forth below:

1. Extent of Disposition

   ☐ Disposition is Complete. Disposition extends to all categories of data.

   ☐ Disposition is partial. The categories of data to be disposed of are set forth below or are found in an attachment to this Directive:

   > [Insert categories of data]

2. Nature of Disposition

   ☐ Disposition shall be by destruction or secure deletion of data.

   ☐ Disposition shall be by a transfer of data. The data shall be transferred to the following site as follows:

   > [Insert or attach special instructions.]

3. Timing of Disposition

   Data shall be disposed of by the following date:

   ☐ As soon as commercially practicable

   ☐ By (Insert Date]

4. Signature of Authorized Representative of Division

   BY:_____         Date: _____

   Printed Name:_____         Title/Position:_____

5. Verification of Disposition of Data

   BY:_____         Date: _____

   Printed Name:_____         Title/Position:_____

# VIRGINIA SCHOOL DATA PRIVACY AGREEMENT

## OPTIONAL: EXHIBIT "E" GENERAL OFFER OF PRIVACY TERMS

### 1. Offer of Terms

Provider offers the same privacy protections found in this DPA between it and the Division to any other school division ("Subscribing Division") who accepts this General Offer though its signature below. The Provider agrees that the information on the next page will be replaced throughout the Agreement with the information specific to the Subscribing Division filled on the next page for the Subscribing Division. This General Offer shall extend only to privacy protections and Provider's signature shall not necessarily bind Provider to other terms, such as price, term, or schedule of services, or to any other provision not addressed in this DPA. The Provider and the Subscribing Division may also agree to change the data provided by Division to the Provider to suit the unique needs of the Subscribing Division. The Provider may withdraw the General Offer in the event of: (1) a material change in the applicable privacy statues; (2) a material change in the services and products subject listed in the Originating Service Agreement; or (3) after three years from the date of Provider's signature to this form. Provider shall notify the Division in the event of any withdrawal so that this information may be transmitted to the Subscribing Divisions.

BY: _Sonita Thompson_  Date: May 23, 2024

Printed Name: Sonita Thompson  Title/Position: Chief of Staff

### 2. Subscribing Division

A Subscribing Division, by signing a separate Service Agreement with Provider, and by its signature below, accepts the General Offer of Privacy Terms. The Subscribing Division's individual information is contained on the next page. The Subscribing Division and the Provider shall therefore be bound by the same terms of this DPA.

BY: _____  Date: _____

Printed Name: _____  Title/Position _____

**TO ACCEPT THE GENERAL OFFER THE SUBSCRIBING DIVISION MUST DELIVER THIS SIGNED EXHIBIT TO THE PERSON AND EMAIL ADDRESS LISTED BELOW**

BY: _Sonita Thompson_  Date: May 23, 2024

Printed Name: Sonita Thompson  Title/Position: Chief of Staff

Email Address Sthompson@cli.org

## Luo, Jianchong

| | |
|---|---|
| **From:** | Heather Tranen <htranen@cli.org> |
| **Sent:** | Monday, April 8, 2024 5:29 PM |
| **To:** | Luo, Jianchong |
| **Cc:** | Reina Prowler; Michele LaCoursiere |
| **Subject:** | Re: RFP No. 24-2626-1JL (Coaching Services for Elementary Schools Teachers) - Oral Presentation |
| **Attachments:** | Virginia School Data Privacy Agreement.pdf; General Training Catalog FY24.pdf |

Hi Jianchong,

CLI is thrilled to be considered for a partnership with Henrico. Below you will find responses to the various negotiation items.. Please let us know should you require any additional clarity.

**Negotiation Item 1:  Rates**
**Original Proposal – $1667/day embedded in recommended scope of 66 onsite days**

· $1540 discounted onsite day rate for additional onsite days added to recommended scope.

· Virtual Coaching $315/hour

Adjusted Consultant Rates – **$1575/day with guaranteed 35 onsite days** (4 days of Discovery, 1 day of strategic planning, weekly onsite days and a Stepback Onsite) – *5.5% discount*
- $1445 per additional onsite day – *6% discount*
- $265 per virtual coaching session hour – *15.8% discount*

Adjusted Consutlant Rates – **$1445**/onsite day **with guaranteed full contract of 40 hours for 30 weeks – *13% discount***
- $240 virtual coaching sessions

**Original Seminar Rate per 50 attendees**

· Full Day  $15,190

· Half Day is $10,264.

Adjusted Seminar Rates:

· Full Day $11,500

· Half Day $$7590

**Negotiation Item 2: Supplemental Information**
*We are attaching a catalog of our seminars that can be reviewed. We always tailor any topic in our seminar to the needs of the audience so this should just serve as a sampling of what we can do during our partnership and the negotiated rates listed above would apply to any of the content in the catalog.*

**Negotiation Item 3: Data Privacy Agreement.**  *We have no issues with the shared Privacy Agreement*

**Negotiation Item 4: Exemptions to Sample Contract.**  *We have no exemptions to the Sample Contract*

We hope you enjoy the rest of your day! Thank you again for your consideration.

All the best,

# Training Catalog

| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| **Classroom Ecology** | **Engagement, Motivation, and Belonging** | This session will ground educators in deeply understanding the children we serve and the critical need for educators to recognize their own identity and biases, to reflect on their influence over their expectations, decision making, and interactions with children. This allows for a sense of connectedness and builds successful relationships with children whose racial and cultural backgrounds are different from their own.<br><br>**Goals**<br>• Gain an understanding of racial identity theory and explore our own identity<br>• Use the knowledge of racial identity to develop strategies we can use in our work within the school community<br>• Explore what it means to feel a sense of belonging and how race, culture, ethnicity, and language practice affect a child's sense of belonging<br>• Learn seven ways educators can increase and protect Black and Latinx children's sense of belonging<br>• Take an inquiry approach to investigate our classroom practices through the lens of belonging<br>• Build partnerships and engage families in literacy instruction to create a community-wide focus on literacy | 5 hours | Coaches, Teachers, and Administrators |
| **Components of Skilled Reading OR Literacy Instruction** | **Understanding the Science of Reading and Instructional Practices** | Reading is a complex process that involves different skills, processes, strategies, and understandings. These complexities can be broken down into 2 broad categories:<br>1. word recognition (decoding) and<br>2. language comprehension.<br><br>These two processes working together result in Reading Comprehension - the ability to understand and interpret what is being read, the ultimate goal of reading. | 5 hours | Coaches, Teachers, and Administrators |

| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| | | In this session we will explore the components of skilled reading and writing, including orthographic mapping, phonological and phonemic awareness, phonics, fluency, vocabulary, comprehension, and more.<br><br>**Goals:**<br>• Understand the components of skilled reading<br>• Explore ways to support reading development | | |
| **Writing** | **Writing Standards and Process** | In this training we will examine specific examples from the writing learning standards and identify opportunities for incorporating culturally sustaining practices<br><br>**Goals**<br>• Review the writing process and understand the importance of each stage and how to teach children to use the process to plan, organize, and produce effective writing | 5 hours | Coaches and Teachers |
| **Literacy Instruction for English Language Learners**<br><br>**Foundational Skills** | **Emergent Literacy and Language Development** | In this training we will gain an understanding of the concept of phonological and phonemic awareness and how it serves in literacy acquisition<br><br>**Goals:**<br>• Develop guiding principles for teaching/learning phonological and phonemic awareness<br>• Understand how to assess phonological and phonemic awareness and how to use data to drive instruction<br>• Plan a range of student activities for teaching phonological and phonemic awareness appropriate for children of varying reading stages<br>• Understand orthography and understand its role in reading and writing development.<br>• Develop strategies to support students' orthographic processing skills.<br>• Learn strategies to teach print concepts to support early literacy development<br><br>***Primarily for Coaches of K-3 Teachers*** | 5 hours | Coaches and Teachers |

| Category | Training Name | Training Description | Length | Audience |
|----------|---------------|---------------------|--------|----------|
| **Foundational Skills** | **Accuracy/ Understanding Phonics** | In this training we will understand the WHAT, WHY, and HOW of phonics acquisition<br><br>**Goals:**<br>• Develop guiding principles for teaching/learning phonics<br>• Understand how to assess phonics and use data to drive instruction<br>• Plan for phonics lessons with renewed understanding of phonics acquisition process | 3 hours | Coaches and Teachers |
| **Leadership Training** | **Diagnosing Instruction Goals** | In this training we will align our vision of effective foundational literacy learning experiences<br><br>**Goals:**<br>• Increase capacity to use an instructional framework to diagnose literacy instruction<br>• Practice using the Teacher Coaching Tool to set goals | 3 hours | School and Systems Leaders |
| **Leadership Training** | **Examining Data & Goal Setting** | **Goals:**<br>• Understand the role of data in reflecting and planning<br>• Use data to drive discussions and pre-planning for the future | 3 hours | School and Systems Leaders |
| **Family and Community Engagement** | **Fostering Meaningful Community Connections** | This training consists of educator professional development that will deepen understanding and strengthen culturally sustaining family engagement<br><br>**Goals**<br>• Educators will be able to recognize and leverage the diverse funds of knowledge that families bring to the educational setting, fostering meaningful family connections that enhance student learning and engagement | 3-5 hours | All-Staff |

| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| **Foundational Skills** | **Orthography, Orthographic Processing and Print Concepts** | Reading is a complex process involving different skills, processes, and strategies. Join us to learn how to support children's emergent literacy skills and help them grow into readers and writers. In this session, we will provide an overview of the Simple View of Reading and Scarborough's Reading Rope to understand the components of skilled reading. We will explore ways to support emergent reading development through concepts of print, alphabet knowledge, alphabetic principle, phonology, and orthographic processing.<br><br>**Goals:**<br>• Understand the components of skilled reading<br>• Explore ways to support emergent reading development | 1 hour | Coaches and Teachers |
| **Foundational Skills** | **Phonological Awareness and Processing** | Phonological awareness is a critical early literacy skill that supports children in recognizing and working with the sounds of spoken language. During this session, we will develop and build a common understanding of what components are included in phonological awareness and why they are important for children's early literacy learning. We will explore practical ways that we can use phonological awareness activities to help children identify and manipulate sounds in speech.<br><br>**Goals:**<br>• Understand the concept of Phonological Awareness and how it serves in literacy acquisition.<br>• Explore a range of activities to support Phonological Awareness instruction | 1 hour | Coaches and Teachers |

| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| **Foundational Skills** | **Phonemic Awareness** | Phonemic awareness is the ability to notice, think about, and work with the smallest individual sounds in spoken words. To fully understand language, children need practice around individual phonemes to understand the relationship among words, letters, and sounds. In this session, we will develop and build a common understanding of the components included in phonemic awareness instruction and explore activities that support children to notice, articulate, and manipulate phonemes.<br><br>Goals:<br>• Understand the concept of Phonemic Awareness and how it serves in literacy acquisition<br>• Examine and practice a range of activities for teaching Phonemic Awareness | 1 hour | Coaches and Teachers |
| **Foundational Skills** | **Fluency** | Fluency is the ability to read words, phrases, sentences, and connected text accurately, at an appropriate pace, and with expression. Fluency is a bridge between word recognition and comprehension, allowing readers to make meaning for a text "on the run." In this session, we will learn the elements of fluency, and how to assess a child's fluency. We will explore ways to support children's reading fluency through modeling and repeated reading.<br><br>**Goals:**<br>• Understand what reading fluency is and why it is important<br>• Explore strategies for supporting emergent and early reader's fluency<br>• Expand knowledge of how fluency is developed<br>• Understand the intersection between fluency and instructional practices<br>• Plan for fluency instruction across literacy practices | 1 hour | Coaches and Teachers |

| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| **Vocabulary** | **Vocabulary** | Vocabulary refers to the kinds of words and phrases children must know and understand to read increasingly challenging texts with comprehension. Building children's vocabulary is an incredibly important component of literacy instruction. When children know more words, they can comprehend more of what they read, communicate more of what they know, and develop a joy of reading! In this session, we will outline three ways that will help increase children's vocabulary development. We will also explore some ways we can help build children's vocabulary.<br><br>**Goals:**<br>• Understand why vocabulary matters in literacy instruction<br>• Identify effective strategies that foster vocabulary learning | 1 hour | Coaches and Teachers |
| **Leadership Training** | **Foundational Literacy Skills for School and System Leaders** | Impactful leaders recognize that teaching and learning are complex and nuanced endeavors. To support your charge as the lead teacher and learner in your school, we will review foundational literacy skills and identify guiding principles to establish a culture supportive of high-quality, sustained professional learning. Further, we will share guidance on how to review instructional materials and assessments to ensure that they are high-quality and aligned to standards. | 2 hours | School and Systems Leaders |

| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| | | **Goals:**<br>• Foster collective responsibilities to provide cutting-edge instruction so that all children are ensured equitable learning opportunities<br>• Identify how school leaders can support teachers in growing early literacy content knowledge and high-leverage practices<br>• Reflect on your school's literacy achievement and identify scaffolds and resources that support continued growth | | |
| **Writing** | **Writing about Reading** | In this training we will explore how to use writing as a tool for learning across content areas<br><br>**Goals:**<br>• Learn how to effectively coach teachers to integrate writing instruction into all subject areas<br>• Explore how to use writing to help children develop critical thinking, problem-solving, and communication skills<br>• Understand the importance of integrating writing instruction into all subject areas | 3 hours | Coaches and Teachers |
| **Leadership** | **Supporting Professional Learning Communities to Deliver Equitable Instruction** | In this training we will design a system to support effective literacy instruction, including effective programs, resources, and coaching for teachers | 5 hours | Administrator |
| **Literacy** | **Assessing Literacy** | • Understand and analyze sources of data<br>• Use data to inform and individualize instruction<br>• Check for understanding, monitoring progress, and using data to adapt instruction in the moment | Varies | Teachers and School Leaders |

| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| **Literacy Instruction** | **Small Group Instruction** | In this training we will learn to understand how to use small groups to differentiate literacy instruction<br><br>**Goals:**<br>• Understand the different types of small group instruction children can engage in so they experience diverse texts and diverse groups<br>• Understand how to plan for small group instruction by grouping readers, selecting and analyzing texts, and determining a focus for learning<br>• Examine the components of a small group lesson | Varies | Teachers and School Leaders |
| **Writing** | **Written Expression** | In this training we will understand how to assess student writing to drive instruction<br><br>**Goals:**<br>• Learn how to provide feedback and support children's writing growth<br>• Explore how to use writing as a tool for learning across content areas<br>• Explore how to use writing to help children develop critical thinking, problem-solving, and communication skills<br>• Review the writing process and understand the importance of each stage and how to teach children to use the process to plan, organize, and produce effective writing | Varies | Teachers and School Leaders |

| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| **Shared Reading** | **Reading, Analyzing and Discussing Texts** | Reading, Analyzing and Discussing Texts offers ideas and guidance around the materials, routines, and interactions to support high-level, meaningful, joyful, and equitable literacy instruction through shared reading.<br><br>This course will enhance participants' ability to facilitate higher-order discussions and critical conversations using their current reading curriculum.<br><br>**Goals:**<br>• Build students' complex language comprehension such as analysis, synthesis, and critical thinking to make judgment statements<br>• Give students access and exposure to a wide range of texts<br>• Promote motivation, engagement, and joy in reading<br>• Disrupt the "pedagogy of poverty" by building on students' cognitive capacity<br>• Give students agency through critical literacy<br>• Sustain and affirm students' linguistic, racial, and cultural assets | Single, 3-hour session | Coaches and Teachers |

| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| **Reading Workshop** | **Reading Workshop 1: Routines, Procedures and Environments to support Reading Workshop** | Reading Workshop is an instructional practice through which we help children grow as readers. In order to do that, it's helpful to create a common definition of what strong, or admirable, readers do. What are they like? What makes someone a strong reader?<br><br>**Goals:**<br><ul><li>Understand how children grow as readers</li><li>Understand highly effective reading instruction</li><li>Understand how to create a classroom environment that supports Reading Workshop</li><li>Understand the purpose and structure of Reading Workshop</li></ul> | 5 hours | Coaches and Teachers |
| **Reading Workshop** | **Reading Workshop 2: Conferring With Readers** | In this training we will uncover why Reading Workshop is a critical part of your literacy block, have a chance to reflect on our current reading instruction, and learn how to strengthen the components of Reading Workshop- particularly the Mini-Lesson and conferences.<br><br>**Goals:**<br><ul><li>Understand why Reading Workshop is a critical part of our literacy block</li><li>Examine the breadth and depth of our Reading Workshop Mini-Lessons</li><li>Examine the breadth and depth of our Reading Conferences</li><li>Experience the Share Time in Reading Workshop</li></ul> | 5 hours | Coaches and Teachers |

| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| **Writing** | **Writing Workshop 1: Understanding Writing Development and the Writing Process** | Writing Workshop is a powerful way teach children how to write. Becoming a strong, effective, fluent writer is one of the most powerful tools we can give to our children.<br><br>**Goals:**<br>• Understand what children need in order to develop and grow as writers<br>• Understand our role in effective writing instruction<br>• Understand the structure of Writing Workshop and how to implement it<br>• Understand how to create a classroom culture and environment that supports writers | 5 hours | Coaches and Teachers |
| **Writing** | **Writing Workshop 2: Using Mentor Texts and Planning Units of Study** | Writing Workshop is a place where we can script ideas, arrange them in a particular order, and create certain effects inside our readers.  Writing is hard work- writing well is even harder- but it is also rewarding and satisfying and worth the effort! In this seminar we will explore our role in creating a community of writers where ALL children can write purposefully, confidently, and joyfully. Becoming strong, effective, fluent writers and having our children see themselves as such, is one of the most powerful tools we can give to children.<br><br>**Goals:**<br>• Understand planning of units of study in Writing Workshop<br>• Understand our role of teacher as writer<br>• Examine the writing process through writing mini-lessons<br>• Learn strategies to strengthen our writing conferences during work time<br>• Learn different ways to share and celebrate writing | 5 hours | Coaches and Teachers |

| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| **Shared Reading** | **Purposeful Talk: Collaborative Conversations and Effective Text Discussion** | In this training we explore how we can teach children the skills to engage in meaningful text discussion and collaborative conversations<br><br>**Goals:**<br>• Build an understanding of what purposeful talk means and why it is important<br>• Learn how to create a classroom culture and environment conducive to purposeful talk<br>• Practice planning for a rich text discussion<br>• Explore the teacher's role in facilitating meaningful discussions | 5 hours | Coaches and Teachers |
| **Shared Reading** | **Shared Reading: Building Comprehension through Text Discussion, Citing Evidence and Getting to the Deepest Meaning of Texts** | We will build a shared understanding of what the practice looks like, and begin to explore how we can implement effective shared reading lessons.<br><br>**Goals:**<br>• Build our understanding of what shared reading is, and why it is an essential practice<br>• Explore effective practices in shared reading across the grades<br>• Understand what to look for in a shared reading lesson | 5 hours | Coaches and Teachers |

| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| **Literacy in the Content Areas** | **Enhancing Literacy in the Content Areas** | Literacy skills are of utmost importance in building content knowledge across various subject areas. Proficient reading and writing abilities enable individuals to access and comprehend informational texts, academic resources, and research materials. By effectively reading and comprehending content-specific texts, learners can gain a deeper understanding of concepts, theories, and ideas within a particular discipline. Whether it is science, history, mathematics, or any other subject, literacy skills serve as the foundation for acquiring, interpreting, and applying knowledge. They facilitate effective communication, enable students to engage in higher-level thinking, and empower them to be active participants in their own learning.<br><br>**Goals:**<br><ul><li>Understand how to implement consistent literacy skill building across the content areas in order to assist students in developing deeper strategies for engaging in reading</li><li>Plan opportunities for creative literacies and interdisciplinary work that connect to the lives and interests of students and promote a sense of pride and joy</li><li>Creatively use a variety of teaching approaches to scaffold learning</li></ul> | 3 hours | Teachers and School Leaders |

| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| **School and System Leadershp** | **Effective School Improvement for School Leaders** | This session will lead educators through the elements of an effective instructional improvement cycle and help them better understand the interconnectivity of each element. The session is designed for leaders at all levels and builds on the current knowledge and skills of the participants.<br><br>**Goals:**<br>• Gain a deeper understanding of instructional improvement models through examination of each component<br>• Use site-based data to assist leaders in the development of strategies to improve instruction, a timeline for monitoring for results, reflection and revision as needed<br>• Examine barriers to school improvement and strategies to combat issues<br>• Examine structures for staff and parent engagement in School Improvement models | 5 hours | Administrators and School Leaders |
| **School and System Leadership** | **Reflective Leadership** | This session will explore how the leader manages and prioritizes core leadership competencies and maintains instructional focus while concurrently managing day to day operational matters.<br><br>**Goals:**<br>• Explore key organizational supports to help leaders maintain a focus on instructional programming<br>• Provide school and instructional leaders with tools to foster facilitative leadership amongst faculty and staff<br>• Investigate opportunities to disrupt inequitable practices and build collaborative relationships with internal and external stakeholders | 5 hours | Administrators and School Leaders |

| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| **School and System Leadershp** | **The Power of Learning Walks** | This session guides site-based leaders through instructional learning walks and how to effectively use the information to improve instructional practice and student performance.<br><br>**Goals:**<br>• Develop a deeper understanding of how to use this instructional strategy to monitor teacher practice and provide immediate, targeted feedback<br>• Expand strategies to engage faculty and staff in efforts to close learning gaps among students in all subgroups within the school<br>• Tools will be provided to assist school leaders with identifying professional development opportunities that enable faculty to deliver culturally relevant and differentiated instruction | 5 hours | Administrators and School Leaders |
| **School and System Leadership** | **Strengthening Academic Outcomes through Site-Based Leadership** | This session examines how school leaders can directly impact student performance outcomes through transformational coaching with staff. The session explores how coaching relationships and expectations impact teacher performance.<br>**Goals:**<br>• Develop a deeper understanding of an evidence based coaching model and how to use it to improve student outcomes through focused teacher behaviors<br>• Explore the difference between coaching and mentoring and understand when to use each | 5 hours | Administrators and School Leaders |

Exhibit C

County of Henrico

## Proposal

Children's Literacy Initiative's Response to RFP No. 24-2626 1JL

Coaching Services for Elementary School Teachers

# TABLE OF CONTENTS

## Tab 1 – Introduction and Signed Forms

**Children's Literacy Initiative (CLI) is a 501(c)(3) nonprofit organization with more than 34 years of experience developing the literacy instructional strengths of districts, leaders, and educators to amplify and sustain powerful learning outcomes for children.** In 2015, study results from a U.S. Department of Education-funded project validated CLI's ability to strengthen educator practice and improve child reading and learning achievement levels. CLI is excited to present a proposal for Henrico County Public School's RFP for literacy coaching services for elementary school teachers, leveraging our extensive experience in improving academic outcomes through evidence-based strategies aligned with the Science of Reading, a comprehensive body of research that informs teaching approaches based on the cognitive processes involved in learning to read. Our instructional approach is tailored to address the specific needs of students in diverse classroom settings. Anchored around our **Framework for Teaching and Learning,** we support teachers and leaders to integrate a culturally sustaining pedagogy with the foundational principles of effective instruction, forming a cohesive approach that is infused with both cultural responsiveness and pedagogical excellence. Unlike many conventional teaching and learning frameworks that often exhibit a colorblind approach, our distinctive approach intentionally focuses on centering Black and Latinx children. Recognizing the historical oversight in education, we are committed to ensuring that the experiences and needs of these students, who have long been unseen, are purposefully acknowledged and prioritized within our framework.

CLI understands the unique position Henrico is faced with in driving towards the vision for instruction and learning outcomes for children while balancing the persisting teacher shortage that is exceeding the Virginia state average. Our partnerships focus on building capacity within school teams by both improving instructional practice and also building and supporting instructional leaders who can continue to impact the school learning community in and outside of the work with CLI. We do this by providing the following:

- **Comprehensive Professional Development**: CLI's specialized K-8 professional development sessions empower educators and leaders to facilitate diagnostic analysis, determine baseline performance data, set initial goals, and deliver effective instructional next steps.
    - Topics include Diagnosing Instruction, Examining Data & Goal Setting, Supporting Professional Learning Communities (PLCs) to Deliver Equitable Instruction, and Progress Monitoring.

- **Transformational Coaching and Adaptable Model:** CLI's strength-based coaching leads to sustained change, benefiting schools and systems. One-on-one or small-group coaching enhances instructional efficacy and student engagement. CLI's coaching adapts to various settings, including monolingual, bilingual, and dual-language classrooms.
- **Comprehensive Support and Evaluation:** CLI commits to comprehensive support, including weekly coaching logs and summative evaluation reports and recommendations, to deliver exceptional literacy-focused professional development and coaching aligned with the district's vision. We will also engage in semi-annual stepback meetings with district partners to review the progress of the partnership at the school and district level.
- **Seamless Transition Between Virtual and In-Person Sessions:** CLI has demonstrated experience navigating virtual and in-person sessions, ensuring uninterrupted professional development for partners while adhering to safety protocols, maximizing schedule availability, and limiting collaborative interruptions.

Children's Literacy Initiative understands and meets the minimum eligibility requirements of the RFP listed below:

1. CLI has delivered a detailed and organized proposal that addresses each requirement completely and has included complete pricing as requested.
2. CLI has provided a copy of our valid/current business license.
3. CLI has been in business for 34 years, which exceeds the minimum of three (3) years, and all of our Literacy Instructional Coaches assigned to the Henrico partnership have at least three years of coaching experience and more than five years of teaching experience.
4. CLI has provided five (5) references of similarly completed projects that demonstrate our capabilities in each of the specified areas.
5. CLI is in good standing with federal, state, and municipal jurisdictions and is not under investigation or engaged in litigation that would hinder the conduct of business.
6. CLI has provided all applicable federal and state professional licensing requirements.
7. CLI has provided all required notifications and forms as requested.
8. CLI has (or will have at the time of implementation) the professionals and supporting staff necessary to deliver the contract in a timely manner.
9. CLI is fully capable of delivering a solution to the services described within this RFP within the calendar and scheduling scope of Henrico schools.

The CLI team has deep expertise in literacy instruction, culturally sustaining pedagogy, and adult learning. Our passion is in supporting the coaching and development of teachers to create the conditions that facilitate excellent instruction. We are all leadership and learning experts, led by a former superintendent. Our team includes former principals, district leaders, classroom educators, and academic specialists. We are enthusiastic about the opportunity to bring our impactful work to Henrico and contribute to the continued success and growth of your students. Together, we can create a lasting impact on literacy outcomes and empower students to thrive academically.

# ATTACHMENT A
# PROPOSAL SIGNATURE SHEET

My signature certifies that the proposal as submitted complies with all requirements specified in this Request for Proposal ("RFP") No. 24-2626-1JL – Coaching Services for Elementary Schools Teachers.

My signature also certifies that by submitting a proposal in response to this RFP, the Offeror represents that in the preparation and submission of this proposal, the Offeror did not, either directly or indirectly, enter into any combination or arrangement with any person or business entity, or enter into any agreement, participate in any collusion, or otherwise take any action in the restraining of free, competitive bidding in violation of the Sherman Act (15 U.S.C. Section 1) or Sections 59.1-9.1 through 59.1-9.17 or Sections 59.1-68.6 through 59.1-68.8 of the Code of Virginia.

I hereby certify that I am authorized to sign as a legal representative for the business entity submitting this proposal.

| LEGAL NAME OF OFFEROR (DO NOT USE TRADE NAME): |
| --- |
| Children's Literacy Initiative |
| ADDRESS: |
| 990 Spring Garden Street Suite 400 Philadelphia PA 19123 |
| |
| FEDERAL ID NO: 232515768 |
| SIGNATURE: |
| NAME OF PERSON SIGNING (PRINT): Heather Tranen |
| TITLE: Strategic Partnerships Manager |
| TELEPHONE: 917-209-4209 |
| FAX: |
| EMAIL ADDRESS: htranen@cli.org |
| DATE: 1/24/24 |

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# ATTACHMENT B
# BUSINESS CATEGORY CLASSIFICATION FORM

**Company Legal Name:** Children's Literacy Initiative

**This form completed by:** Signature: _(signature)_           Title: Strategic Partnerships Manager

Date: 1/29/24

## PLEASE SPECIFY YOUR <u>BUSINESS CATEGORY</u> BY CHECKING THE APPROPRIATE BOX(ES) BELOW.

**(Check all that apply.)**

- ☐ **SMALL BUSINESS**
- ☐ **WOMEN-OWNED BUSINESS**
- ☐ **MINORITY-OWNED BUSINESS**
- ☐ **SERVICE-DISABLED VETERAN**
- ☐ **EMPLOYMENT SERVICES ORGANIZATION**
- ☒ **NON-SWaM (Not Small, Women-owned or Minority-owned)**

> **SUPPLIER REGISTRATION** – The County of Henrico encourages all suppliers interested in doing business with the County to register with eVA, the Commonwealth of Virginia's electronic procurement portal, http://eva.virginia.gov.
>
> eVA Registered?  ☒ **Yes**  ☐ **No**

**If certified by the Virginia Minority Business Enterprises (DMBE), provide DMBE certification number and expiration date.**

_____ **NUMBER**         _____ **DATE**

---

**DEFINITIONS**

For the purpose of determining the appropriate business category, the following definitions apply:

*"Small business"* means a business, independently owned and controlled by one or more individuals who are U.S. citizens or legal resident aliens, and together with affiliates, has 250 or fewer employees, or annual gross receipts of $10 million or less averaged over the previous three years. One or more of the individual owners shall control both the management and daily business operations of the small business.

*"Women-owned business"* means a business that is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership, or limited liability company or other entity, at least 51 percent of the equity ownership interest is owned by one or more women who are U.S. citizens or legal resident aliens, and both the management and daily business operations are controlled by one or more women.

*"Minority-owned business"* means a business that is at least 51 percent owned by one or more minority individuals who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership, or limited liability company or other entity, at least 51 percent of the equity ownership interest in the corporation, partnership, or limited liability company or other entity is owned by one or more minority individuals who are U.S. citizens or legal resident aliens, and both the management and daily business operations are controlled by one or more minority individuals.

**"Minority individual"** means an individual who is a citizen of the United States or a legal resident alien and who satisfies one or more of the following definitions:

1. "African American" means a person having origins in any of the original peoples of Africa and who is regarded as such by the community of which this person claims to be a part.

2. "Asian American" means a person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands, including but not limited to Japan, China, Vietnam, Samoa, Laos, Cambodia, Taiwan, Northern Mariana Islands, the Philippines, a U.S. territory of the Pacific, India, Pakistan, Bangladesh, or Sri Lanka and who is regarded as such by the community of which this person claims to be a part.

3. "Hispanic American" means a person having origins in any of the Spanish-speaking peoples of Mexico, South or Central America, or the Caribbean Islands or other Spanish or Portuguese cultures and who is regarded as such by the community of which this person claims to be a part.

4. "Native American" means a person having origins in any of the original peoples of North America and who is regarded as such by the community of which this person claims to be a part or who is recognized by a tribal organization.

*"Service disabled veteran business"* means a business that is at least 51 percent owned by one or more service disabled veterans or, in the case of a corporation, partnership, or limited liability company or other entity, at least 51 percent of the equity ownership interest in the corporation, partnership, or limited liability company or other entity is owned by one or more individuals who are service disabled veterans and both the management and daily business operations are controlled by one or more individuals who are service disabled veterans.

**"Service disabled veteran"** means a veteran who (i) served on active duty in the United States military ground, naval, or air service, (ii) was discharged or released under conditions other than dishonorable, and (iii) has a service-connected disability rating fixed by the United States Department of Veterans Affairs.

*"Employment services organization"* means an organization that provides community-based employment services to individuals with disabilities that is an approved Commission on Accreditation of Rehabilitation Facilities (CARF) accredited vendor of the Department of Aging and Rehabilitative Services.

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# ATTACHMENT C
## Virginia State Corporation Commission (SCC)
## Registration Information

**The Offeror**:

☐ is a corporation or other business entity with the following SCC identification number:
_____ **-OR-**

☐ is not a corporation, limited liability company, limited partnership, registered limited liability partnership, or business trust **-OR-**

☒ is an out-of-state business entity that does not regularly and continuously maintain as part of its ordinary and customary business any employees, agents, offices, facilities, or inventories in Virginia (not counting any employees or agents in Virginia who merely solicit orders that require acceptance outside Virginia before they become contracts, and not counting any incidental presence of the Bidder in Virginia that is needed in order to assemble, maintain, and repair goods in accordance with the contracts by which such goods were sold and shipped into Virginia from Bidder's out-of-state location) **-OR-**

☐ is an out-of-state business entity that is including with this bid/proposal an opinion of legal counsel which accurately and completely discloses the undersigned Bidder's current contracts with Virginia and describes why those contracts do not constitute the transaction of business in Virginia within the meaning of §13.1-757 or other similar provisions in Titles 13.1 or 50 of the Code of Virginia.

Please check the following box if you have not checked any of the foregoing options but currently have pending before the SCC an application for authority to transact business in the Commonwealth of Virginia and wish to be considered for a waiver to allow you to submit the SCC identification number after the due date for bids: ☐

# ATTACHMENT D
## PROPRIETARY/CONFIDENTIAL INFORMATION IDENTIFICATION

NAME OF OFFEROR: _____Children's Literacy Initiative_____

Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the Offeror must invoke the protections of Va. Code § 2.2-4342(F) in writing, either before or at the time the data or other materials are submitted. The Offeror must specifically identify the data or materials to be protected including the section(s) of the proposal in which it is contained and the pages numbers, and state the reasons why protection is necessary. A summary of trade secrets and proprietary information submitted shall be submitted on this form. The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. Va. Code § 2.2-4342(F) prohibits an Offeror from classifying an entire proposal, any portion of a proposal that does not contain trade secrets or proprietary information, line item prices, or total proposal prices as proprietary or trade secrets. If, after being given reasonable time, the Offeror refuses to withdraw such classification(s), the proposal will be rejected.

| SECTION/TITLE | PAGE NUMBER(S) | REASON(S) FOR WITHHOLDING FROM DISCLOSURE |
|---|---|---|
| n/a | | |
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# ATTACHMENT E

## COUNTY OF HENRICO

## INSURANCE SPECIFICATIONS

**The following insurance coverages and limits are required in order to provide goods, services, construction, professional and non-professional services to Henrico County general government agencies and Henrico County Public Schools. These requirements are specific to this procurement and may or may not be the same for future requests.**

**Please be sure and review the Additional Requirements Section**

The Successful Bidder/Offeror shall carry Public Liability Insurance in the amount specified below, including contractual liability assumed by the Successful Bidder/Offeror, and shall deliver a Certificate of Insurance from carriers licensed to do business in the Commonwealth of Virginia and that is representative of the insurance policies. The Certificate shall show that the policy has been endorsed to add the County of Henrico and Henrico County Public Schools named as an additional insured for the Commercial General Liability coverage. ***The certificate must not show in the description of operations section that it is issued specific to any bid, job, or contract.*** The coverage shall be provided by a carrier(s) rated not less than "A-" with a financial rating of at least VII by A.M. Best or a rating acceptable to the County. In addition, the Successful Bidder/Offeror shall agree to give the County a minimum of 30 days prior notice of any cancellation or material reduction in coverage.

## Workers' Compensation

Statutory Virginia Limits
Employers' Liability Insurance - $100,000 for each Accident by employee
$100,000 for each Disease by employee
$500,000 policy limit by Disease

## Commercial General Liability

$1,000,000 each occurrence including contractual liability for specified agreement
$2,000,000 General Aggregate (other than Products/Completed Operations)
$2,000,000 General Liability-Products/Completed Operations
$1,000,000 Personal and Advertising injury
$   100,000 Fire Damage Legal Liability

## Business Automobile Liability – including owned, non-owned and hired car coverage

Combined Single Limit - $1,000,000 each accident

## Umbrella Liability

$2,000,000 Per Occurrence and in the aggregate

**Additional Requirements**

**In addition to the requirements above, the Successful Bidder/Offeror shall thoroughly review the scope of work that is included and if any of the following are included in the services that will be provided, the following additional insurance will be required, if required:**

☐ **Professional Liability - $2,000,000 Per Occurrence (or limit in accordance with Statute for Medical Professional)**
Required if the Scope includes providing advice or consultation including but not limited to; lawyers, bankers, physicians, programming, design (including construction design), architects & engineers and others who require extensive education and/or licensing to perform their duties.

☐ **Cyber Liability - $2,000,000 Per Occurrence**
Required if the Scope includes the collection and electronic transmittal of Personal Health Insurance (PHI), or any other demographic data on individuals including but not limited to Name, Address, Social Security Numbers or any other sort of personally identifying information.

☐ **Abuse and Molestation Coverage - $1,000,000 Per Occurrence**
Required if the scope of work includes the offering of professional or non-professional services to any child or student where one on one contact or consultation is to be provided.

☐ **Pollution Liability - $1,000,000 Per Occurrence**
Required if the scope of work involves the use (other than in a motor vehicle) or removal of a substance or energy introduced into the environment that potentially has an undesired effect or affects the usefulness of a resource. These include, but are not limited to Asbestos, PCB's, Lead, Mold, and Fuels.

☐ **Explosion, Collapse & Underground Coverage (XCU)**
Required of a Contractor in limits equal to the General Liability Limit when the Scope includes any operations involving Blasting, any work underground level including but not limited to wires, conduit, pipes, mains, sewers, tanks, tunnels, or any excavation, drilling, or similar work.

☐ **Builders Risk Coverage**
Required if the scope of work includes the ground up construction of a structure. Limit of insurance shall be 100% of the completed value of the structure. For projects for the renovation of an existing structure, The County shall insure the Builder's Risk with the Contractor being responsible for the first $10,000 of any claim.

☐ **Other as Specified Below**

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**NOTE 1:**    The commercial general liability insurance shall include contractual liability.  The contract documents include an indemnification provision(s).  The County makes no representation or warranty as to how the Bidder/Offeror's insurance coverage responds or does not respond.  Insurance coverages that are unresponsive to the indemnification provision(s) do not limit the Bidder/Offeror's responsibilities outlined in the contract documents.

**NOTE 2**:    The intent of this insurance specification is to provide the coverage required and the limits expected for each type of coverage.  With regard to the Business Automobile Liability and Commercial General Liability, the total amount of coverage can be accomplished through any combination of primary and excess/umbrella insurance. This insurance shall apply as primary insurance and non-contributory with respect to any other insurance or self-insurance programs afforded the County of Henrico and Henrico County Public Schools. This policy shall be endorsed to be primary with respect to the additional insured.

**NOTE 3:**    Title 65.2 of the Code of Virginia requires every employer who regularly employs three or more full-time or part-time employees to purchase and maintain workers' compensation insurance. If you do not purchase a workers' compensation policy, a signed statement is required documenting that you are in compliance with Title 65.2 of the Code of Virginia.

**NOTE 4:**    The Certificate Holder Box shall read as follows:
*County of Henrico*
*Risk Management*
*PO Box 90775*
*Henrico, VA 23273*

# ATTACHMENT F
## DIRECT CONTACT WITH STUDENTS

Name of Offeror:  Children's Literacy Initiative

Pursuant to Va. Code § 22.1-296.1(E), as a condition of awarding a contract for the provision of services that require the contractor or employees of the contractor to have direct contact with students on school property during regular school hours or during school-sponsored activities, the contractor shall provide certification of whether any individual who will provide such services has been convicted of any violent felony set forth in the definition of barrier crime in subsection A of Va. Code § 19.2-392.02; any offense involving the sexual molestation, physical or sexual abuse, or rape of a child, or the solicitation of any such offense; or any crime of moral turpitude.

Any individual making a materially false statement regarding any such offense is guilty of a Class 1 misdemeanor and, upon conviction, the fact of such conviction is grounds for the revocation of the contract to provide such services and, when relevant, the revocation of any license required to provide such services. School boards shall not be liable for materially false statements regarding the certifications required by Va. Code § 22.1-296.1(E),.

Va. Code § 22.1-296.1(E), shall not apply to a contractor or his employees providing services to a school division in an emergency or exceptional situation, such as when student health or safety is endangered or when repairs are needed on an urgent basis to ensure that school facilities are safe and habitable, when it is reasonably anticipated that the contractor or his employees will have no direct contact with students.

For purposes of this certification, "services" means any work performed by an independent contractor wherein the service rendered does not consist primarily of acquisition of equipment or materials, or the rental of equipment, materials and supplies.

The contractor is responsible for affirming certification information for his subcontractors.

Pursuant to Va. Code § 22.1-296.1(F), no school board shall award a contract for the provision of services that require the contractor or his employees to have direct contact with students on school property during regular school hours or during school-sponsored activities when any individual who provides such services has been convicted of any violent felony set forth in the definition of barrier crime in subsection A of § 19.2-392.02 or any offense involving the sexual molestation, physical or sexual abuse, or rape of a child, or the solicitation of any such offense.

Pursuant to Va. Code § 22.1-296.1(G), any school board may award a contract for the provision of services that require the contractor or his employees to have direct contact with students on school property during regular school hours or during school-sponsored activities when any individual who provides such services has been convicted of any felony or crime of moral turpitude that is not set forth in the definition of barrier crime in subsection A of § 19.2-392.02 and does not involve the sexual molestation, physical or sexual abuse, or rape of a child, or the solicitation of any such offense, provided that in the case of a felony conviction, such individual has had his civil rights restored by the Governor.

**As part of this submission, the contractor certifies the following:**

> ☒ **None of the individuals who will be providing services that require direct contact with students on school property during regular school hours or during school-sponsored activities have been convicted of a violent felony set forth in the definition of "barrier**

**crime" in Va. Code § 19.2-392.02(A) or an offense involving the sexual molestation, physical or sexual abuse, or rape of a child, or the solicitation of any such offense;**

**And (select one of the following)**

☒ **None of the individuals who will be providing services that require direct contact with students on school property during regular school hours or during school-sponsored activities have been convicted of any felony or any crime of moral turpitude.**

**or**

☐ **One or more individuals who will be providing services that require direct contact with students on school property during regular school hours or during school-sponsored activities has been convicted of a felony or crime of moral turpitude that is not set forth in the definition of "barrier crime" in Va. Code § 19.2-392.02(A) and does not involve the sexual molestation, physical or sexual abuse, or rape of a child, or the solicitation of any such offense. (In the case of a felony conviction meeting these criteria, the contractor must submit evidence that the Governor has restored the individual's civil rights.).**

_____
*Signature of Authorized Representative*

Heather Tranen
_____
*Printed Name of Authorized Representative*

Children's Literacy Initiative
_____
*Printed Name of Vendor*
*(if different than Representative)*

# ATTACHMENT G
## FEDERAL CONTRACT PROVISIONS

1. **Debarment and Suspension Clause (2 C.F.R. PART 200 APPENDIX II(H))**

   (1) This contract is a covered transaction for purposes of 2 C.F.R. pt. 180 and 2 C.F.R. pt. 3485. As such, the contractor is required to verify that none of the contractor's principals (defined at 2 C.F.R. § 180.995) or its affiliates (defined at 2 C.F.R. § 180.905) are excluded (defined at 2 C.F.R. § 180.940) or disqualified (defined at 2 C.F.R. § 180.935).

   (2) The contractor must comply with 2 C.F.R. pt. 180, subpart C and 2 C.F.R pt. 3485, subpart C, and must include a requirement to comply with these regulations in any lower tier covered transaction it enters into.

   (3) This certification is a material representation of fact relied upon by the County. If it is later determined that the contractor did not comply with 2 C.F.R. pt. 180, subpart C and 2 C.F.R. pt. 3485, subpart C, in addition to remedies available to the County, the Federal Government may pursue available remedies, including but not limited to suspension and/or debarment.

   (4) The contractor agrees to comply with the requirements of 2 C.F.R. pt. 180, subpart C and 2 C.F.R. pt. 3485, subpart C while this offer is valid and throughout the period of any contract that may arise from this offer. The contractor further agrees to include a provision requiring such compliance in its lower tier covered transactions.

2. **RESERVED**

3. **Byrd Anti-Lobbying Clause (2 C.F.R. PART 200 APPENDIX II(I))**

   (1) Contractors who apply or bid for an award of $100,000 or more shall file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, officer or employee of Congress, or an employee of a Member of Congress in connection with obtaining any Federal contract, grant, or any other award covered by 31 U.S.C. § 1352. Each tier shall also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the recipient who in turn will forward the certification(s) to the awarding agency.

   (2) Required Certification. If applicable, contractors must sign and submit to the agency the following certification (See the separate Anti-Lobbying Certification attached to the end of these Terms and Conditions.).

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

   1 No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan,

the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

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

3    The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than $10,000 and not more than $100,000 for each such failure.

The Contractor, certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Contractor understands and agrees that the provisions of 31 U.S.C. Chap. 38, Administrative Remedies for False Claims and Statements, apply to this certification and disclosure, if any.

4.    **Termination of Cause and Convenience (2 C.F.R. PART 200 APPENDIX II(B))**
The County reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the contractor. In the event the initial contract period is for more than 12 months, the resulting contract may also be terminated by the contractor, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.

5.    **Contract Work Hours and Safety Standards Act (2 C.F.R. PART 200 APPENDIX II(E)) (40 U.S.C. 3701-3708; 29 C.F.R. 5.5(b))**
*Required in all contracts over $100K utilizing mechanics or laborers (as defined in 40 U.S.C §§ 3701)*
   (1)    The contractor shall comply with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 C.F.R. Part 5), as applicable.
   (2)    *Overtime requirements.* No contractor or subcontractor contracting for any part of the contract work which may require or involve the employment of laborers or mechanics shall require or permit any such laborer or mechanic in any workweek in which he or she is employed on such work to work in excess of forty hours in such workweek unless such laborer or mechanic receives compensation at a rate not less than one and one-half times the basic rate of pay for all hours worked in excess of forty hours in such workweek.
   (3)    *Violation, liability for unpaid wages; liquidated damages.* In the event of any violation of the clause set forth in paragraph (2) of this section the contractor and any

subcontractor responsible therefor shall be liable for the unpaid wages. In addition, such contractor and subcontractor shall be liable to the United States (in the case of work done under contract for the District of Columbia or a territory, to such District or to such territory), for liquidated damages. Such liquidated damages shall be computed with respect to each individual laborer or mechanic, including watchmen and guards, employed in violation of the clause set forth in paragraph (2) of this section, in the sum of $27 for each calendar day on which such individual was required or permitted to work in excess of the standard workweek of forty hours without payment of the overtime wages required by the clause set forth in paragraph (2) of this section.

(4) *Withholding for unpaid wages and liquidated damages.* The County shall upon its own action or upon written request of an authorized representative of the Department of Labor withhold or cause to be withheld, from any moneys payable on account of work performed by the contractor or subcontractor under any such contract or any other Federal contract with the same prime contractor, or any other federally-assisted contract subject to the Contract Work Hours and Safety Standards Act, which is held by the same prime contractor, such sums as may be determined to be necessary to satisfy any liabilities of such contractor or subcontractor for unpaid wages and liquidated damages as provided in the clause set forth in paragraph (3) of this section.

(5) *Subcontracts.* The contractor or subcontractor shall insert in any subcontracts the clauses set forth in paragraph (2) through (5) of this section and also a clause requiring the subcontractors to include these clauses in any lower tier subcontracts. The prime contractor shall be responsible for compliance by any subcontractor or lower tier subcontractor with the clauses set forth in paragraphs (2) through (5) of this section.

6. **Clean Air Act and the Federal Water Pollution Control Act Clauses (2. C.F.R. PART 200 APPENDIX II(G))**
   (1) The contactor agrees to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act, as amended, 42 U.S.C. § 7401 et seq.
   (2) The contractor agrees to report each violation to the County and understands and agrees that the County will, in turn, report each violation as required to assure notification to the Department of Education, and the appropriate Environmental Protection Agency Regional Office.
   (3) The contractor agrees to include these requirements in each subcontract exceeding $150,000 financed in whole or in part with Federal assistance provided by the Department of Education.
   (4) The contractor agrees to comply with all applicable standards, orders, or regulations issued pursuant to the Federal Water Pollution Control Act, as amended, 33 U.S.C. 1251 et seq.
   (5) The contractor agrees to report each violation to the County and understands and agrees that the County will, in turn, report each violation as required to assure notification to the Department of Education, and the appropriate Environmental Protection Agency Regional Office.
   (6) The contractor agrees to include these requirements in each subcontract exceeding $150,000 financed in whole or in part with Federal assistance provided by the Department of Education.

7. **Legal/Contractual/Administrative Remedies for Breach (2 C.F.R. Part 200, APPENDIX II(A))**
   **DEFAULT:** In case of failure to deliver goods or services in accordance with the contract terms and conditions, the County, after due oral or written notice, may procure them from other sources and

hold the contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which the County may have.

8. **Equal Employment Opportunity Clause (2 C.F.R. PART 200 APPENDIX II(C))**
   During the performance of this contract, the contractor agrees as follows:

   (1) The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, sexual orientation, gender identity, or national origin. The contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment without regard to their race, color, religion, sex, sexual orientation, gender identity, or national origin. Such action shall include, but not be limited to the following:

   Employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided setting forth the provisions of this nondiscrimination clause.

   (2) The contractor will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, or national origin.

   (3) The contractor will not discharge or in any other manner discriminate against any employee or applicant for employment because such employee or applicant has inquired about, discussed, or disclosed the compensation of the employee or applicant or another employee or applicant. This provision shall not apply to instances in which an employee who has access to the compensation information of other employees or applicants as a part of such employee's essential job functions discloses the compensation of such other employees or applicants to individuals who do not otherwise have access to such information, unless such disclosure is in response to a formal complaint or charge, in furtherance of an investigation, proceeding, hearing, or action, including an investigation conducted by the employer, or is consistent with the contractor's legal duty to furnish information.

   (4) The contractor will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding, a notice to be provided advising the said labor union or workers' representatives of the contractor's commitments under this section, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

   (5) The contractor will comply with all provisions of Executive Order 11246 of September 24, 1965, and of the rules, regulations, and relevant orders of the Secretary of Labor.

   (6) The contractor will furnish all information and reports required by Executive Order 11246 of September 24, 1965, and by rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the administering agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations, and orders.

(7) In the event of the contractor's noncompliance with the nondiscrimination clauses of this contract or with any of the said rules, regulations, or orders, this contract may be canceled, terminated, or suspended in whole or in part and the contractor may be declared ineligible for further Government contracts or federally assisted construction contracts in accordance with procedures authorized in Executive Order 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoked as provided in Executive Order 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

(8) The contractor will include the portion of the sentence immediately preceding paragraph (1) and the provisions of paragraphs (1) through (8) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to section 204 of Executive Order 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. The contractor will take such action with respect to any subcontract or purchase order as the administering agency may direct as a means of enforcing such provisions, including sanctions for noncompliance:

Provided, however, that in the event a contractor becomes involved in, or is threatened with, litigation with a subcontractor or vendor as a result of such direction by the administering agency, the contractor may request the United States to enter into such litigation to protect the interests of the United States.

The applicant further agrees that it will be bound by the above equal opportunity clause with respect to its own employment practices when it participates in federally assisted construction work: *Provided,* That if the applicant so participating is a State or local government, the above equal opportunity clause is not applicable to any agency, instrumentality or subdivision of such government which does not participate in work on or under the contract.

The applicant agrees that it will assist and cooperate actively with the administering agency and the Secretary of Labor in obtaining the compliance of contractors and subcontractors with the equal opportunity clause and the rules, regulations, and relevant orders of the Secretary of Labor, that it will furnish the administering agency and the Secretary of Labor such information as they may require for the supervision of such compliance, and that it will otherwise assist the administering agency in the discharge of the agency's primary responsibility for securing compliance.

The applicant further agrees that it will refrain from entering into any contract or contract modification subject to Executive Order 11246 of September 24, 1965, with a contractor debarred from, or who has not demonstrated eligibility for, Government contracts and federally assisted construction contracts pursuant to the Executive Order and will carry out such sanctions and penalties for violation of the equal opportunity clause as may be imposed upon contractors and subcontractors by the administering agency or the Secretary of Labor pursuant to Part II, Subpart D of the Executive Order. In addition, the applicant agrees that if it fails or refuses to comply with these undertakings, the administering agency may take any or all of the following actions: Cancel, terminate, or suspend in whole or in part this grant (contract, loan, insurance, guarantee); refrain from extending any further assistance to the applicant under the program with respect to which the failure or refund occurred until satisfactory assurance of future compliance has been received from such applicant; and refer the case to the Department of Justice for appropriate legal proceedings.

**9. Clauses Required by 2 C.F.R. PART 200 APPENDIX II(D)**
   *Required for certain construction contracts over $2K*

   (1) To the extent applicable, all transactions regarding this contract shall be done in compliance with the Davis-Bacon Act (40 U.S.C. 3141- 3144, and 3146-3148) and the requirements of 29 C.F.R. pt. 5. The contractor shall comply with 40 U.S.C. 3141-3144, and 3146-3148 and the requirements of 29 C.F.R. pt. 5 as applicable.

   (2) The contractor shall pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor.

   (3) The contractor shall pay wages not less than once a week.

   (4) The contractor shall comply with the Copeland Anti-Kickback Act (40 U.S.C. 3145), 18 U.S.C. 874, and the requirements of 29 CFR Part 3 as applicable, which are incorporated by reference into this contract.

   (5) Subcontracts. The contractor or subcontractor shall insert in any subcontracts the clauses of this section and such other clauses as the Department of Education may by appropriate instructions require, and also a clause requiring the subcontractors to include these clauses in any lower tier subcontracts. The prime contractor shall be responsible for the compliance by any subcontractor or lower tier subcontractor with all of these contract clauses.

   (6) Breach. A breach of these contract clauses may be grounds for termination of the contract, and for debarment as a contractor and subcontractor as provided in 29 C.F.R. § 5.12.

**10. Rights to Inventions Made Under a Contract or Agreement Clause (2 C.F.R. PART 200 APPENDIX II(F))**
   The contractor will comply with the requirements of 37 C.F.R. Part 401 (Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements), and any implementing regulations issued by the Department of Education.

**11. Access to Records**

   The following access to records requirements apply to this contract:

   (1) The contractor agrees to provide the County, the Department of Education, the Comptroller General of the United States, or any of their authorized representatives access to any books, documents, papers, and records of the Contractor which are directly pertinent to this contract for the purposes of making audits, examinations, excerpts, and transcriptions.

   (2) The contractor agrees to permit any of the foregoing parties to reproduce by any means whatsoever or to copy excerpts and transcriptions as reasonably needed.

(3) The contractor agrees to provide the Department of Education or its authorized representatives access to construction or other work sites pertaining to the work  being completed under the contract.

## 12. Department of Education Seal, Logo, and Flags

The contractor shall not use the Department of Education seal(s), logos, crests, or reproductions of flags or  likenesses of Department of Education agency officials without specific Department of Education pre-approval.

## 13. Compliance with Federal Law, Regulations, and Executive Orders

This is an acknowledgement that Department of Education financial assistance will be used to fund all or a  portion of the contract. The contractor will comply with all applicable Federal law, regulations, executive orders, and Department of Education policies, procedures, and directives.

## 14. No Obligation by Federal Government

The Federal Government is not a party to this contract and is not subject to any  obligations or liabilities to the non-Federal entity, contractor, or any other party pertaining  to any matter resulting from the contract.

## 15. Program Fraud and False or Fraudulent Statements or Related Acts

The contractor acknowledges that 31 U.S.C. Chap. 38 (Administrative Remedies for  False Claims and Statements) applies to the Contractor's actions pertaining to this  contract.

# ANTI-LOBBYING CERTIFICATION
*Byrd Anti-Lobbying Clause (2 C.F.R. PART 200 APPENDIX II(I))*

Contractors who apply or bid for an award of $100,000 or more shall file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, officer or employee of Congress, or an employee of a Member of Congress in connection with obtaining any Federal contract, grant, or any other award covered by 31 U.S.C. § 1352. Each tier shall also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the recipient who in turn will forward the certification(s) to the awarding agency.

Required Certification. If applicable, contractors must sign and submit to the agency the following certification.

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

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

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

The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than $10,000 and not more than $100,000 for each such failure.

The Contractor, certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Contractor understands and agrees that the provisions of 31 U.S.C. Chap. 38, Administrative Remedies for False Claims and Statements, apply to this certification and disclosure, if any.

_____
Signature of Contractor's Authorized Official

Heather Tranen Strategic Partnerships Manager
Name and Title of Contractor's Authorized Official


_____
*Printed Name of Offeror*
*(if different than Representative)*

| 21 Title I Schools: Henrico County |
| --- |
| Adams Elementary: <br> 600 S Laburnum Avenue <br> Henrico, VA  23223 |
| Arthur Ashe Elementary <br> 1001 Cedar Fork Road <br> Henrico, VA  23223 |
| Baker Elementary <br> 6651 Willson Road <br> Henrico, VA  23231 |
| Donahoe Elementary <br> 1801 Graves Road <br> Sandston, VA  23150 |
| Dumbarton Elementary <br> 9000 Hungary Spring Road <br> Henrico, VA  23228 |
| Fair Oaks Elementary <br> 201 Jennings Road <br> Highland Springs, VA  23075 |
| Glen Lea Elementary <br> 3909 Austin Avenue <br> Henrico, VA 23222 |
| Harvie Elementary <br> 3401 Harvie Road <br> Henrico, VA  23223 |
| Highland Springs Elementary <br> 600 Pleasant Street <br> Highland Springs, VA  23075 |
| Holladay Elementary <br> 7300 Galaxie Road <br> Henrico, VA  23228 |
| Johnson Elementary <br> 5600 Bethlehem Road <br> Henrico, VA  23230 |
| Laburnum Elementary <br> 500 Meriwether Avenue <br> Henrico, VA  23222 <br> Lakeside Elementary <br> 6700 Cedar Croft Street <br> Henrico, VA  23228 |
| Longan Elementary <br> 9200 Mapleview Ave. |

| |
|---|
| Henrico, Va. 23294 |
| Longdale Elementary<br>9500 Norfolk Street<br>Glen Allen, VA  23060 |
| Montrose Elementary<br>2820 Williamsburg Road<br>Henrico, VA  23231 |
| Ratcliffe Elementary<br>2901 Thalen Street<br>Henrico, VA  23223 |
| Ridge Elementary<br>Three Chopt Road<br>Henrico, VA 23229 |
| Sandston Elementary<br>7 Naglee Avenue<br>Sandston, VA  23150 |
| Seven Pines<br>301 Beulah Road<br>Sandston, Va. 23150 |
| Ward Elementary<br>3400 Darbytown Road<br>Henrico, VA  23231 |

# ATTACHMENT I
## SAMPLE CONTRACT

**Non-Professional Services Contract**
**Contract No. [#]**

This Non-Professional Contract (this "Contract") entered into this [#] day of [month] 20[##], by [Offeror's Name]  (the "Contractor") and the County School Board of Henrico County, Virginia ("HCPS").

**WHEREAS** HCPS has awarded the Contractor this Contract pursuant to Request for Proposals No. [#], as modified by [list addenda with dates separated by commas] (the "Request for Proposals"), for [subject matter of the RFP].

**WITNESSETH** that the Contractor and HCPS, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

**SCOPE OF CONTRACT:**  The Contractor shall provide the services to the HCPS as set forth in the Contract Documents.

**COMPENSATION:**  The compensation HCPS will pay to the Contractor under this Contract shall be [insert information, referenced document, matrix, etc.].

**CONTRACT TERM:**  The Contract term shall be for a period of [number] year[s] beginning [date] and ending [date].  [The County *or* HCPS] may renew the Contract for up to [number] [number]-year terms giving 30 days' written notice before the end of the term unless Contractor has given [the County *or* HCPS] written notice that it does not wish to renew at least 180 days before the end of the term.

**CONTRACT DOCUMENTS:**  This Contract hereby incorporates by reference the documents listed below (the "Contract Documents") which shall control in the following descending order:

1.  This Non-Professional Services Contract between HCPS and Contractor.
2.  The General Contract Terms and Conditions included in the Request for Proposals.
3.  The Negotiated Modifications (Exhibit [letter]).
4.  Contractor's Best and Final Offer dated [date] (Exhibit [letter]).
5.  Contractor's Original Proposal dated [date] (Exhibit [letter]).
6.  The Scope of Services included in the Request for Proposals.

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound hereby.

| [Contractor Name] | County School Board of Henrico County, Virginia |
| | 406 Dabbs House Road |
| [Address] | Henrico, VA 23223 |
| [City, State, Zip] | |

_____          _____
Signature                                                                  Signature

Heather Tranen
_____          _____
Printed Name and Title                                           Purchasing Director

1/29/24
_____          _____
Date                                                                        Date

## Tab 2 – Statement of the Scope

*Improving Elementary Literacy Outcomes Through Onsite Coaching:* Henrico County Public Schools have demonstrated a commitment to enhancing literacy and math outcomes for children by making coaching support available to all elementary schools. The strength of that commitment is evident in your proactive approach to finding additional means of support for schools with vacancies. Facilitated by our team of teaching and learning experts, CLI proposes a partnership that will develop teachers and leaders in literacy instruction and strengthen student engagement across all subject areas by developing teacher practice in cultivating joy, affirming identity, and responding to the social-emotional needs of all children. Learn more about our coaching sessions below:

- Coaching sessions center on fostering an inclusive and rigorous learning environment, which is essential for creating a safe, welcoming, and supportive learning space for all children to thrive socially and academically. We will provide educators with strategies to create an environment that values.
- Coaching sessions equip educators with the tools and strategies to ensure that assessments are aligned with standards and learning goals, unbiased, and culturally responsive. We will explore ways to assess children's knowledge, skills, and understanding fairly and equitably, regardless of their background or circumstances while maintaining high academic expectations and the belief that all children can reach those expectations.
- Coaching sessions integrate a focus on linguistic liberation, which involves creating an environment where all children can use their home language, dialects, and cultural expressions without fear of judgement, while supporting their learning and the learning of others. We will explore ways to integrate children's language and culture into instruction and assessments, promoting children's linguistic and cultural identities.
- Coaching sessions focus on differentiating instruction based on knowing your children well. We will provide strategies to help educators understand their children's strengths, interests, and needs. This will enable educators to tailor instruction to meet individual children's needs.

*Capacity Building through Peer Coaching:* CLI supports school and system leaders in diagnosing and strengthening literacy instruction so that every child can experience mastery, success, and the freedom to create their own future. CLI's Core Service Model provides a structure for consistent data gathering that allows us to focus on the most important research-based activities that impact children's learning and to measure if our approach is working systemically. The cyclical process consists of four phases: Discovery, Vision Setting & Strategic Planning, Support & Capacity Building, and Stepbacks; it will repeat across the school year for ongoing progress monitoring. Each phase plays a critical role in driving meaningful progress and achieving our shared goals. Throughout our partnership, we will engage school and systems leaders with learning experiences grounded in the Core Service Model. This will serve as the bridge to explicitly transfer structural knowledge by promoting skill development, active participation, application of knowledge, and continuous feedback to directly apply their learning in a meaningful context. At the heart of our service model is a research-backed structure for school improvement designed to empower school leaders not only within the confines of our partnership but as a versatile tool that can be employed independently to bolster and guide any

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improvement efforts across diverse educational landscapes.

*Fulfillment of RFP Operational Requirements and Impact Monitoring:* CLI guarantees coaching services during regular school hours, adherence to the HCPS school calendar, and flexibility to adjust coaching service days/hours based on district needs. Our proposal will commence with a four-day, district-level Discovery, which will provide a diagnostic analysis of the state of instruction and the roadmap for our coaching engagement across identified schools. CLI utilizes a web-based system, Monday.com, to track our partnership deliverables and can provide real-time updates to district partners on our progress towards our coaching goals as well as analysis of teacher and leader feedback on the coaching sessions and instructional diagnostics utilizing our Framework for Teaching and Learning. This facilitates informed decision-making and integration of coaching insights into the School Quality Plan. We are a national organization that has years of experience hiring and matching place-based coaches to embed in district partnerships. Our proposal assumes the utilization of a Virginia-based coach to support the work, minimize travel costs, and maximize impact investment. CLI's approach prioritizes clear communication, adaptability, and alignment with HCPS guidelines, reflecting our dedication to supporting and enhancing the overall quality of education in the district.

## Tab 3 – Default, Termination, and Barred Certification Statement

Pursuant to Section VI of the RFP, Children's Literacy Initiative certifies the following:

1. CLI has not defaulted on any government contract in the last five years.
2. No government agency has terminated a contract for cause with CLI in the last five years.
3. Neither CLI nor any of its officers, directors, partners, or owners are currently barred from participating in any procurements by any federal, state, or local government body.

## Tab 4 – Offeror Qualifications, Experience, and Resumes

At CLI, we have combined our expertise in culturally sustaining pedagogy and literacy instruction to create a comprehensive and independently validated Early Childhood Education Professional Development (PD) Program that accelerates children's learning and development while cultivating joy, embracing and affirming identity, and responding to the social and emotional needs children bring into classrooms every day. At CLI, we believe that every child deserves and benefits from high-quality literacy instruction and experiences. When children have access to excellent instruction, they become part of a learning environment that fosters equity, infuses joy in learning, and introduces them to who they are and can become through literature. Such an environment celebrates, encourages, and supports all children in meeting and exceeding their fullest potential.

Acknowledged by the American Institutes of Research, CLI earned the prestigious Standard Without Reservation award and a "Tier 3 Promising" effectiveness score from the What Works Clearinghouse, solidifying its position as the gold standard in the industry. The study took place across three academic years: 2016–17 (year 1), 2017–18 (year 2), and 2018–19 (year 3). The CLI intervention involved three components:

- Development of Instructional Lead Teachers as Mentors and Models: CLI selected K–3 teachers from each participating school and trained them as instructional lead teachers (ILTs) to serve as mentors and develop model classrooms in which fellow teachers could observe best practices. Each ILT was assigned a specific topic of focus (e.g., Reading Workshop, Intentional Read Aloud, or small group instruction) and received additional coaching and training on that focus.
- Instructional Leadership Development: CLI held school-level leadership team meetings and district-level meetings with principals and district administrators to help them understand CLI's work and involve them with the progress monitoring of teacher and student literacy practice as well as develop their own literacy practice.

The American Institutes of Research (AIR) report on a randomized control trial evaluation of CLI's i3 Validation project found statistically significant results for CLI's impact on teacher practice and student learning. In Denver, in each of the first two years of the initiative, SPF data demonstrated stronger gains in student achievement in schools receiving CLI services when compared to control schools not receiving services (complete analysis is attached).

AIR has surveyed teachers in CLI-served schools as part of the project. Overall, teachers involved in the project report that CLI services are having a positive impact on their professional development. In particular, teachers report the following:

- 90% of teachers agree that CLI coaching has had a positive impact on their professional development
- 94% of teachers agree they use CLI strategies in their classrooms
- 93% of teachers agree their CLI coach helps promote a positive learning environment
- 89% of teachers find the feedback they receive from their CLI coach to be helpful
- 93% of teachers agree that they have a good relationship with their CLI coach
- 96% of teachers agree that they are comfortable receiving critical feedback

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Additionally, one Denver Public Schools leader's request to continue our services drives home the impact we can make:

*"Based on the success of the partnership and the student learning results, we are requesting a continuation of services across the six schools. We believe that the work will continue to accelerate teacher practice and student achievement in these schools. We also believe this network of schools can be used as a model for embedded professional development that can be scaled across the district."*

Leaders and teachers consistently emphasize the positive impact of CLI, noting increased student engagement and a strengthened sense of community among children. Recent data from the 2021-22 school year, collected from CLI-supported educators in Elizabeth and Passaic, further underscores the success of our approach.

- Workshops: 88% of CLI-supported educators affirmed their capability to implement best practices in teaching.
- Coaching: CLI coaching emerged as the primary support contributing to their professional growth.
- Materials: 94% of CLI educators agreed that the books are accurate, affirming, and inclusive. 96% of CLI educators acknowledged that the books contribute to children's sense of belonging, critical thinking, joy, engagement, and an increased appreciation for reading.

Our hiring and internal professional development practices ensure that staff members possess in-depth knowledge of the content and pedagogy and the curricula used by our partners as well as an understanding of the effective school improvement processes. When selecting employees who will work with partners, CLI tailors its staffing to provide a balanced team with the appropriate experience to address the unique needs of our partners. Credentials might include:

- Completion of a master's degree in educational leadership or comparable subject area
- Experience training and coaching teachers and administrators
- Proven ability to plan and execute staff development grounded in the philosophy of adult learning
- ESL/Bilingual Certification
- Principal Certification
- 10 years teaching and/or administrator experience in a K-12 setting
- Experience supporting teachers in high needs school communities
- Knowledge of the theoretical and practical objectives, and practices of educational planning and development
- Knowledge of the techniques, procedures, and component parts of a long-range educational plan including needs assessment, action planning, implementation, and evaluation
- Knowledge of the principles and practices of both educational program delivery and educational management and administration

**Children's Literacy Initiative holds the following memberships and professional affiliations:**

ASCD – Association for Supervision and Curriculum Development

ILA – International Literacy Association – Learning Forward

NAEYC – National Association for the Education of Young Children

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NBCDI – National Black Child Development Institute

IDA – International Dyslexia Association

ALA – American Library Association

NABE – National Association for Bilingual Education

NCTE – National Council for Teachers of English

NEA – National Education Association

## Title 1 School Support Approach and Project Examples

Our track record of similar projects and impact in Title 1 schools (shown below) show that our efforts to drive student learning outcomes build capacity for both instructional staff and site-based leaders.

## Coaching Projects and Their Impact

### Project: Elizabeth, NJ, 2017 - Present Elizabeth Public Schools (EPS)

Audience: Over 100 general education teachers and leaders in nine schools including bilingual educators and leaders in six school, 20+ administrators and district staff, 2,000+ children

Schools Served:
- Initially, six schools in grades K-3 through the i3 Investing in Innovation Grant (2017-2020)
- Expanded to an additional eight schools during the second year of the i3 Grant
- Currently serving each of the 26 district schools, supporting bilingual, special education, and general education classrooms

Project Components: Combination of transformational coaching, professional development seminars, instructional leadership efforts, collaboration with district literacy coaches, and specific initiatives tailored to support general education and bilingual education.
- i3 Investing in Innovation Grant (2017-2020):
  - Supported six schools in grades K-3 with best literacy practices in general and bilingual classrooms
  - Ongoing professional development for central office personnel, school-based coaches, and families
- Current Initiatives:
  - Transformational coaching involving 1:1 and small group coaching for educators focused on classroom ecology, small group instruction, independent work time, and independent reading
  - Professional development seminars in reading and foundational skills, core habits of lesson design
  - Instructional leadership efforts through principal coaching, principal meetings, data analysis, and school-based leadership team meetings.
  - Collaboration and professional development with district literacy coaches to enhance coaching impact and build sustainability in the district.
- Bilingual Education Support:
  - Supported all Elizabeth schools engaged in a Transitional Bilingual Program
  - Supported six elementary schools in grades K-5 during the 22-23 school year

- ○ Enhanced teaching and learning experiences of over 50 bilingual educators, including 20 administrators and district staff, and over 1,000 children
- Bilingual Education Initiatives:
  - ○ Instructional improvement efforts involving 1:1 coaching for bilingual educators in Elizabeth Public Schools Transitional Bilingual Program focused on all components of Spanish and English literacy instruction
  - ○ Supporting the implementation of Reader's Workshop and Guided Reading using district-adopted curriculum resources (HMH) and CLI-curated mentor texts in Transitional Bilingual Classrooms.
  - ○ Supporting bilingual teachers in analyzing classroom data
  - ○ Instructional leadership efforts through principal and vice-principal meetings focusing on district literacy goals
  - ○ Curating materials and supplying classrooms to ensure access to high-quality, grade-level appropriate, and culturally sustaining materials in Spanish and English

## Project: Transformative Partnership with Omaha Public Schools (2019 - Present)

Audience: School leaders, literacy coaches, and teachers districtwide in Omaha Public Schools

Project Services:
- Cross-sector review of eight schools literacy instruction using CLI's Teaching and Learning Framework
- Shaped the district's strategy for developing instructional leaders
- Influenced decisions on systems, coaching, and development to enhance leadership capacity
- Collaborated on literacy tools aligned with the Science of Reading and standards, supporting foundational skills instruction
- Ongoing professional development, tailored training, and coaching for school leaders, literacy coaches, and teachers
- Job-embedded professional development, training, and coaching support to school-based Literacy Leaders

Results:
- 80% of leaders surveyed agreed CLI's support, coaching, and development supported them in improving practices
- 100% of leaders reported that their content knowledge in literacy instruction and instructional leadership had improved over the course of the year because of the support from CLI
- 100% of leaders agreed that their knowledge of effective coaching and facilitating adult learning and development increased over the course of the school year because of working with CLI

## Project: Passaic Public Schools Passaic, NJ, 2015 - 2022

Audience: 250 teachers, 22 administrators, and over 5,700 children

Schools Served: Within 15 elementary schools in Passaic Public Schools with support for grades K-5, general, bilingual, and special education

Project Components: CLI has been a trusted partner of Passaic Public Schools for the last eight years. Our staff of up to 12 Literacy Instructional Leaders have provided support to all bilingual and general education literacy educators in grades K-5. We enhanced the teaching and learning experiences through several strategic initiatives, including:

- Instructional improvement efforts:
  - 1:1 coaching for educators focused on all components of literacy instruction.
- Implementation of a Dual Language Program:
  - Supporting the rollout and implementation of a new curriculum, CKLA Caminos, in participating K-3 Dual Language programs, K-5 bilingual, and general education classrooms.
- Synchronous and Asynchronous Professional Development seminars:
  - Topics Include: balanced literacy, reading and writing foundational skills, and core habits of lesson design.
- Design and Implementation of a Summer Curriculum:
  - Synchronous and asynchronous for grades K-5 in English and Spanish, providing reading, writing, and foundational skills lessons with an at-home component.
- Instructional Leadership Development:
  - Principal coaching, principal meetings, and school-based leadership team meetings.
- Collaboration with district stakeholders:
  - Design, development, and curation of K-3rd grade mentor text collections in Spanish and English to promote access to diverse texts.
- Professional development and coaching support during remote learning:
  - Implementation of synchronous and asynchronous reading and writing lessons, strategies for engagement in a virtual learning community, especially during the COVID safety protocols.
- Professional Development and Coaching in special education classrooms:
  - Support focused on small group instruction, increased stamina and joy during independent reading, and transfer of reading skills and strategies to student-selected texts.

Results/Objective Data:
- Instructional improvement efforts that include successful 1:1 coaching for educators focused on all components of literacy instruction Implementation of a Dual Language Program, as well as supporting the rollout and implementation of a new curriculum, CKLA Caminos, in participating K-3 Dual Language programs, K-5 bilingual and general education classrooms
- Meaningful collaboration with district stakeholders, the design, development, and curation of K-3rd grade mentor text collections in Spanish and English to promote access to diverse texts as "mirrors and windows" to celebrate children's sense of identity and representation in authentic, quality literature
- 16% increase over the course of the school year in the percentage of CLI-supported educators who reported that they have increased their ability to cultivate strong relationships with students by building a community of learners centered on positive identity and joy
- CLI-supported educators listed "CLI coaching" as the number one support that contributed to their ability to grow professionally

- 88% of CLI-supported educators agreed that they're capable of implementing best practices in their teaching
- 96% of CLI-educators agreed that the books help children feel a sense of belonging, build criticality and intellect, experience joy, increase engagement and help build appreciation for reading

## Passaic 3rd Grade ELA State Assessment Data (2015 to 2019)

- State ELA student assessment data from Passaic City School District suggests that a robust, multiyear and district-wide partnership with CLI helps moves students out of the lowest performance tiers and into proficiency at a much higher percentage than "business-as-usual."
- From the year before CLI's partnership with Passaic City School District to the 2018-19 school year, the percentage of 3rd grade students reaching proficiency on state literacy assessments increased by 15 percentage points (14% to 29%), which is over twice the growth when compared to 3rd grade students in the state of New Jersey overall, who saw an increase of six percentage points (44% to 50%)*.
- From the year before CLI's partnership with Passaic City School District to the 2018-19 school year, the percentage of 3rd grade students scoring in the lowest performance tier on state literacy assessments decreased by 9 percentage points (38% to 29%), which significantly outpaced the decrease seen in 3rd grade students in the state of New Jersey overall, who saw a decrease of one percentage point (15% to 14%)*.

 *Excludes Passaic Gifted and Talented due to late formation of the school

## Passaic Leader Feedback:

*"Here in Passaic, CLI has helped transform the culture around early literacy instruction, so our general education and bilingual teachers feel supported and empowered in their efforts to get students reading at grade level. CLI is currently building sustainability in Passaic with the additional support of our curriculum rollout. Our partnership has provided school-based leaders, central office directors and supervisors, as well as teachers with the collaborative opportunities that are critical to fostering the broad adoption and ownership of the early literacy strategies and practices critical for effective instruction."* - Dr. Gloria Vargas, Director of Bilingual/ESL and World Languages

## Project: School District of Philadelphia Literacy Initiative Philadelphia, PA 2015-2022

Audience: District stakeholders (superintendents, principals, teachers, literacy specialists)

## Schools Served:

- 120 SDP schools overall in 10 networks

## Project Components:

- Professional development on Foundational Skills provided since 2015
- Employed up to 120 FTE Early Literacy Specialists and 15 PT contracted Professional Developers during early years
- Employed 57 FTE Early Literacy Specialists in the final year
- Teachers and coaches trained in Scarborough's Reading Rope and Foundations (phonics program for K-2)

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- Coaching focused on systematic, explicit, and direct phonics program, using student data for effective lessons
- Support for Tier 1 instruction, understanding components of The Science of Reading through small group instruction
- Project supported K-5 with 1:1 and small group coaching, leadership support, district Literacy Lead trainings, Lab Site Days, coaching, and internal professional development for CLI Early Literacy Specialists

Details of Methods/Results with Data:
- STAR Early Literacy assessment data focused on Foundational Skills coaching
- 96% of schools saw an increase in the percentage of students performing at or above reading benchmarks between Fall and Spring
- 15 percentage point increase on average of the percentage of students per school performing at or above reading benchmarks between Fall and Spring
- 10 percentage point decrease on average of the percentage of students per school in the highest reading support tier between Fall and Spring

*See Appendix* for:
- Additional Impact Data
- Documentation related to Demonstrated Effectiveness including SEL-related Survey Data, SEL Workshop Example, and General Impact Data
- *SEL-related Survey Data*
- *Oct2022_CIS_OPS.pptx*
- Client Reference Form
- Additional Past Partnerships

**An example of staff we would include in our partnership with Henrico includes (resumes attached):**

*Dr. Diana Greene (Chief Executive Officer)* is a renowned leader in public education and an early adopter and passionate advocate of the Science of Reading. Prior to joining CLI, Dr. Greene served over 37 years in public education as a classroom teacher, school principal, Director of Staff Development, Deputy Superintendent of Instructional Services, and most recently as the Superintendent of Duval County Public Schools (DCPS), the 20th-largest school district in the nation. In 2021, Dr. Greene led DCPS to be an early and successful adopter of the Science of Reading, leading to her district becoming a benchmark for other schools. A champion of children, families and educators, Dr Greene oversaw many transformative changes at DCPS, increasing schools across the distrcit to "A" ratings, removing all schools from the states turnaround list, cutting the number of low-performing schools by more than half, and leading the transition to remote learning during the Covid-19 pandemic.   Dr. Greene's exceptional leadership expertise at the school district level, her unwavering dedication to childhood literacy, acumen in resource development, and profound commitment to equity in education propels CLI forward in fulfilling its mission at a most vital time in the field of education.

*Erica Holmes-Ware (Chief Program Officer)* is an equity-driven leader and a Doctoral Degree Candidate for

Urban Educational Leadership, boasting 15 years of experience, including a wealth of knowledge in transformational coaching and curriculum implementation support. Her expertise extends to programs such as Haggarty, Fundations, Wit & Wisdom, Expeditionary Learning, and Benchmark. Erica has honed her skills in guiding senior administrators and instructional staff, meticulously evaluating classroom instruction methods, and implementing professional development workshops and training initiatives. Her efforts consistently yield substantial increases in teacher efficacy and instructional outcomes. In her role as Chief Program Officer at Children's Literacy Initiative, Erica fosters a high-performance environment centered around reading science. Under her visionary leadership, CLI's Program and School Service Delivery teams have seamlessly integrated and emphasized the Science of Reading into all aspects of our work with school communities, educators, and leaders. This steadfast focus has resulted in remarkable enhancements in teaching methodologies, student learning outcomes, and leadership within our school partnerships. Erica's history of prioritizing cultural inclusivity and representation aligns classroom instruction and teaching methods with the rich and diverse experiences of students of color, making her a driving force for positive change in education.

*Caryn Henning (Managing Director of Professional Development and Program Design)*, an educational leader with an unwavering commitment to early literacy, brings over 25 years of experience to her mission of improving outcomes for schools. From her roots in the classroom to her current role, Caryn has consistently focused on enhancing the learning experiences of children, particularly in marginalized communities, with the goal of narrowing the opportunity gap. She has much knowledge in supporting teachers, coaches, and school leaders in the review and implementation of these curriculums. Caryn's dedication shines through in her efforts to cultivate equitable learning environments that prioritize personalized instruction, affirming each child's unique genius, identity, language, and culture. Her expertise, cultivated primarily within Title 1 schools, uniquely positions her as a driving force in impactful educational leadership. Caryn's distinguished record of accomplishment is marked by a proven ability to provide leadership coaching and implement transformative strategies, leading to sustainable school improvement.

*Michele LaCoursiere-Ferrer (Executive Director)* has over 20 years of experience in leadership, project implementation, and school service delivery. She has served Black and Latinx communities as a teacher, reading specialist, student services advocate, as well as school and organizational leader. Her adaptability, data-driven decision-making, and demonstrated ability to build the capacity of diverse teams with exceptional results enables her to work effectively with multiple stakeholders. Michele has a vast knowledge of literacy theory including formal training in Fundations, Wilson Reading, Really Good Reading and in the Science of Reading.

## Tab 5 – References

### Rockingham VA School District

In Y23-24, with Rockingham VA School District to support a cohort of Early Childhood Special Education (ECSE) and Virginia Preschool Initiative (VPI) preschool (0-5yrs) classroom teachers, site and district administrators. The phases of our Core Service Model provide services for teachers and leaders to receive 1:1/small group coaching and trainings to increase content knowledge and implement their early childhood curriculum with impact. In concert with Rockingham leaders, the CLI team has developed a strategic plan to focus on increasing children's opportunities for discussion and collaboration with peers and teachers. CLI support is provided in person and virtually, building capacity to plan and deliver strategic whole/small lessons and play center experiences that grow children's joy, understanding and expression of concepts, skills and strategies.

|  |  |
|---|---|
| Client Name: | Rockingham County Public Schools |
| Contact Name: | Melissa Bentley |
| Contact Title: | Director of Pupil Personnel Services |
| Contact Phone Number: | 540-564-3228 |
| Contact e-mail address: | mbentley@rockingham.k12.va.us |
| Contract Date: | March 1st, 2023 |
| Description: | We are working with the Early Childhood Special Education (ECSE) teachers and classrooms in Rockingham, VA. Children in these classrooms range from ages 2-5. In our partnership with Rockingham County Public Schools, we are set to deliver:<br>• (4) 3-hour in-person professional development sessions – up to 30 participants (ECSE Teachers and Virginia Preschool Initiative (VPI) teachers)<br>• (35) coaching sessions<br>Rockingham County Public Schools has also purchased (7) sets of Blueprint for Early Learning Curriculum and our Literacy Instructional Leaders (LILs) have provided support around this curriculum in both whole-group and small-group settings. |

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In addition to our partnerships in VA, we present additional references for initiatives similar in size, and and scope for the following partnerships:

| | |
|---|---|
| Client Name: | Passaic Public School District |
| Contact Name: | Dr. Gloria Vargas |
| Contact Title: | Director of Bilingual Education/ESL of Passaic Schools |
| Contact Phone Number: | 973-470-5500, ext. 4219 |
| Contact e-mail address: | gvargas@passaicschools.org |
| Contract Date: | 2015-Present |
| Description: | Partnered with Passaic Public School District to support new curriculum implementation. CLI coach works with designated bilingual/dual language teachers using Content Focused Coaching approach to support teachers with lesson development, engagement strategies, and assessment analysis. |

| | |
|---|---|
| Client Name: | Omaha Public Schools |
| Contact Name: | Miki Holbeck |
| Contact Title: | Coordinator of Early Literacy |
| Contact Phone Number: | (531) 299-9477 |
| Contact e-mail address: | Michelle.Holbeck@ops.org |

| Description: | Conducted a cross-sector review of eight schools leveraging our research-based Teaching and Learning Framework. Omaha Public Schools had developed a strategic plan focusing on Instructional Leadership Development and we provided them with a comprehensive report with evidence-based recommendations for instructional improvement across the district. Equipped with a comprehensive, anonymized analysis of the state of instruction, curriculum, and instructional systems, the findings helped inform Omaha Public Schools' strategy for supporting the coaching and development of school leaders as instructional leaders, enabling strategic decisions about what systems, structures, coaching, and development would be most beneficial in increasing school and district leadership capacity around instructional leadership. The review also provided individual school leaders with evidence-based insight into the state of early literacy instruction within their schools to determine instructional priorities for the school year and create a strategic plan based on the data and trends revealed through classroom observations, stakeholder interviews, and artifact analysis. |
|---|---|

## Tab 6 – Service Approach and Implementation

| Phase | Purpose | Resources/Activities |
|---|---|---|
| **Discovery Phase** | In this initial phase, we embark on a journey of understanding. We engage with our partners to learn about their unique school community, building relationships with teachers, school leadership, and students. Through activities such as Learning Walks, data dives, and focus groups, we gain valuable insights into classroom dynamics and identify strengths and areas of opportunity. | • Leadership intake<br>• Learning Walks<br>• Student work and artifact analysis<br>• Teacher and student focus groups<br>• Data dives<br>• Curriculum and material reviews |
| **Vision Setting and Strategic Planning Phase** | Once we have a comprehensive understanding of the context, we collaboratively develop a shared vision. This phase involves analyzing collected data, conducting root cause analysis, and setting priorities for our work. Together, we create a theory of action, establish goals, and determine individual roles. By developing a strategic plan, we chart a clear path toward instructional growth and improved outcomes. | • Data review<br>• Root cause analysis<br>• Determine priorities and focus of our work<br>• Determine how each stakeholder will support the strategic plan<br>• Determine metrics for success<br>• Develop strategic plan |
| **Support and Capacity Building Phase** | In this phase, we bring the strategic plan to life. Our team provides context-specific coaching and support to educators, ensuring they have the necessary resources and skills to implement the plan effectively. We offer targeted professional development opportunities aligned with strategic goals, empowering teachers, coaches, and leadership teams to thrive. | • Context-specific coaching and support during on-site days<br>• Development for teachers, coaches, and leadership teams aligned to a strategic plan |
| **Stepback Phase** | At strategic and planned intervals, we take a step back to reflect on our progress and make intentional adjustments. We analyze the growth achieved in relation to the initial goals, identifying areas where additional information or refinement may be needed. This reflective analysis informs strategic revisions and ensures that our partnership remains responsive and aligned with evolving needs. | • Analyze growth from the initial strategic plan goals<br>• Determine where we need more information |

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**CLI's Core Service Model** provides a structure for consistent data gathering that allows us to focus on the most important research-based activities that impact children's learning and to measure if our approach is working systemically.

Throughout our partnership with Henrico Public Schools, we will engage school and systems leaders with learning experiences grounded in the Core Service Model. This will serve as the bridge to explicitly transfer structural knowledge by promoting skill development, active participation, application of knowledge, and continuous feedback to directly apply their learning in a meaningful context. The Core Service Model phases serve as a blueprint for school leaders to continue these developmental practices within their schools for ongoing capacity building.



Core Service Model Process

Discovery
Vision Setting & Strategic Planning
Support & Build Capacity
Stepbacks
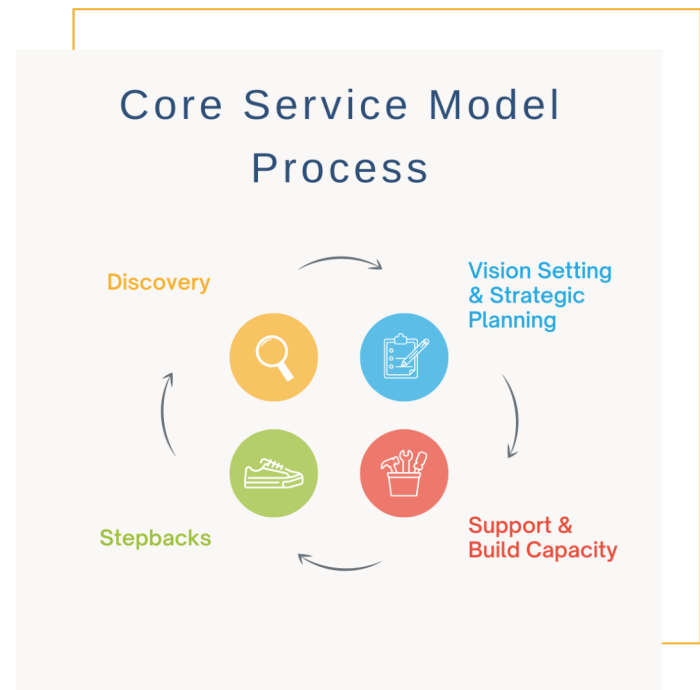
Our *Framework for Teaching and Learning* is the cornerstone of our work with our partners, and it drives us through our Core Service Model. CLI's Framework for Teaching and Learning is rooted in the seminal research of Dr. Richard Elmore, Dr. Gloria Ladson-Billings, Dr. Gholdy Muhammed, and Dr. Zaretta Hammond. The Framework was created to support coaches in gathering instructional data, offering usable feedback, leveraging data within strategic planning, setting priorities and goals to enhance professional development sessions, and coaching and developing teachers and school leaders by asking the following essential questions:

- Are children engaging with curriculum and materials that are challenging, authentic, and affirming and value diverse experiences?
- Are teachers acting as thoughtful and planned facilitators of learning and supporting children to engage in the heavy thinking work of the lesson?
- How are children seizing opportunities to build their own knowledge and support the learning of others?
- How are teachers creating and leveraging classroom conditions that support the diverse needs of children?

We are dedicated to empowering schools with comprehensive data reporting and progress-tracking solutions that facilitate school improvement efforts. We aim to tell new evidence-based stories that illuminate the significant impact of high-quality, culturally responsive teaching on a child's literacy journey. The Framework guides our work by focusing our attention on the most important levers for instructional improvement—the teacher, the content, the children, and the interactions among all three. In response to our increasingly technological world, the content of the Framework can be accessed and organized through the convenience of an app.

In alignment with the *Framework for Teaching and Learning*, CLI's new coaching app enables coaches to collect, organize, and use these data sources to drive and support their coaching practice while readily accessing student learning and teacher practice data. The app will help CLI and its partners to expand our understanding of how improvements in a teacher's instruction lead to the outcomes for children. It will also help stakeholders ensure that children are getting the thoughtful, rigorous instruction they deserve and generate rich insights for continuous improvement.

Inputting data into the app allows for real-time reports to help CLI and our partners identify trends and target areas for improvement with intentionality. Utilizing the *Framework for Teaching and Learning* throughout the Core Service Model, including the Vision Setting and Strategic Planning Phase, allows for alignment between CLI's vision and Henrico's vision for instruction. These critical conversations allow for a more meaningful implementation with all parties working toward a common and specific goal. These reports anchor our work in evidence and data to propel us into the creation of an effective strategic plan. Data from the app is also used in both the root cause analysis and Stepback Phase of our Core Service Model. Our robust data reporting service provides schools with efficient tools to track their progress towards established goals.
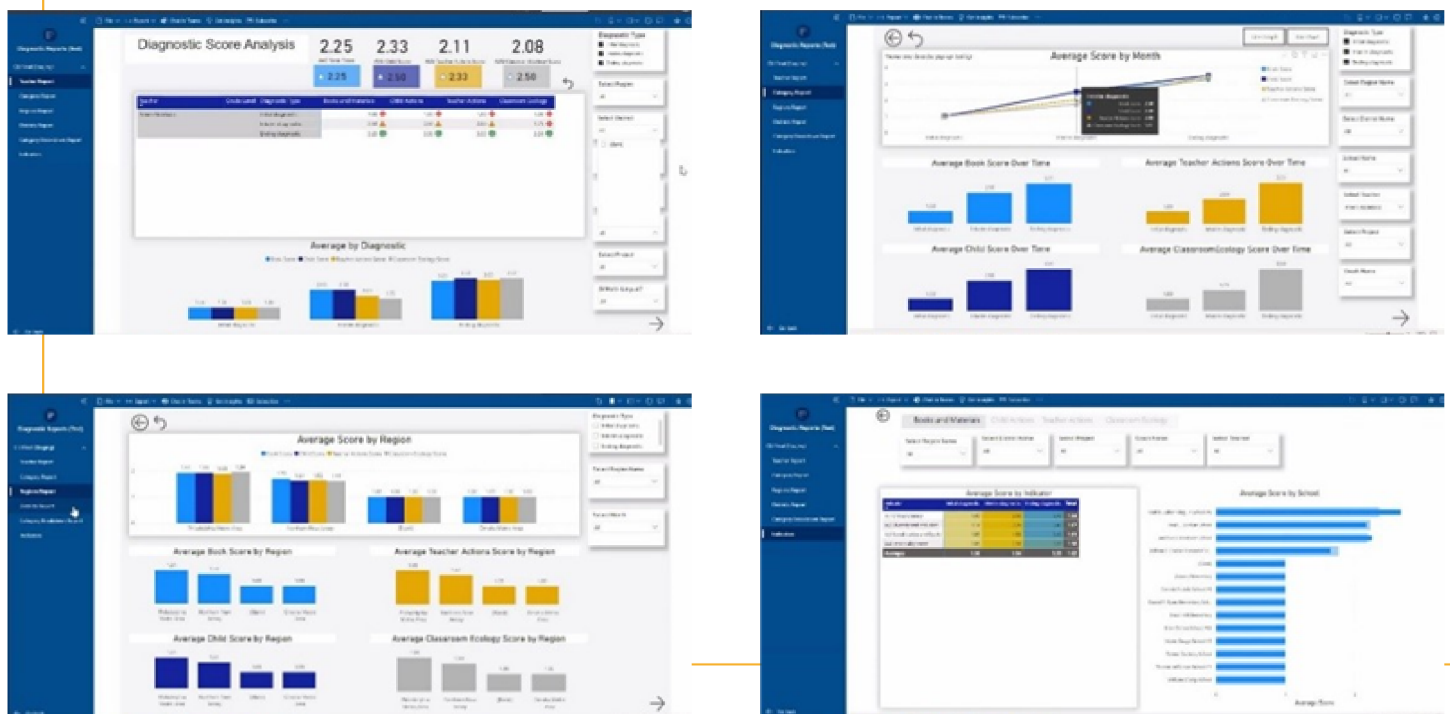


*Examples of Diagnostic Reports*

## School-Based Support at Henrico

To best support schools and drive toward shared goals, CLI begins every project by working in close collaboration with our partners to leverage and build on the strengths of existing practices, programs, and curriculums.

We work hard to understand our partner's experiences and vision, and then provide thought partnership to help achieve instructional goals. Most importantly, we value leaders, strive to build on their existing strengths, and grow their capacity to support equitable instruction. Through inquiry and a collaborative approach, we support school and systems leaders in creating spaces and places where children experience joy, leverage their genius, and work together toward a more just world.

To do this, we first spend time working alongside the school leadership team, engaging in discovery, vision setting, and strategic planning. Gathering this data on the individual school level allows us to create customized action plans that focus on the most important research-based activities to meet individual partner needs and impact children's learning. At the same time, we provide support and guidance to the school leadership to further enhance their toolkit to drive instructional improvement efforts.

### Discovery

We believe it is essential to develop a deep understanding of the Henrico Public Schools' context to design a plan to create true growth and improvement in elementary literacy practice. Our proposed scope of work will kick off with a four-day discovery, during which CLI will work with district and school leaders to align on a vision for effective, equitable, and culturally sustaining instructional practices. As such, CLI will work collaboratively through the discovery process, which will include:
- Reviewing the diagnostic and baseline performance data for sample Henrico elementary schools, including the 21 Title 1 elementary schools
- Reviewing instructional materials
- Observing instruction through Learning Walks
- Analyzing assessment data and children's work
- Speaking with stakeholders (including school leaders, teachers, caregivers, and children)
- Participating in team leader-led activities (e.g., team meetings, teacher observations/feedback)
- Learning more about the Henrico vision for coaching and aligning on a vision for CLI support in selected schools

During Learning Walks, we will:
- Develop a strong, centralized vision and plan for excellent instruction by aligning currently used instructional frameworks with CLI's Framework for Teaching and Learning indicators
- Observe lessons and engage in a facilitated debrief where stakeholders review effective practices using CLI's Framework for Teaching and Learning to discuss the evidence they saw in classrooms
- Observe for equity to have open and honest discussions about who is getting access to rigorous content and where we need to provide additional support

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*Deliverables include:*

- District collaboration and intake meetings
- A leader intake meeting
- Learning Walks in a sample of elementary schools
- Teacher, student, and/or caregiver focus groups
- Participation in team leader-led activities
- An instructional diagnostic analysis report of current literacy practices

## Vision Setting and Strategic Planning

CLI will collaborate with district and school leadership to develop a clear, comprehensive plan for instructional improvement that identifies goals and outcomes and establishes a division of responsibilities for implementation at the district level to identify the highest leverage areas to focus on, including recommendations for the schools and educators that will receive coaching. Selected school and systems leaders will identify the root causes and issues that lead to performance challenges and identify instructional leadership practices they will need to execute to successfully support the strategic plan.

CLI leaders can leverage literacy expertise and identify key levers in strategic planning for instructional improvement. Our deep understanding of literacy development, instructional methodologies, and assessment strategies equips us with the knowledge and insights needed to identify areas for growth and improvement in literacy instruction. By analyzing data, researching best practices, and staying current with the latest literacy research, we can pinpoint specific instructional strategies or resources that will have the greatest impact on student learning outcomes. This expertise allows us to guide strategic planning discussions and advocate for evidence-based practices grounded in data that will positively impact teacher practice to increase student engagement, comprehension, and overall literacy skills. The plan will leverage assets and structures in the district and schools and identify and fill leadership and instructional opportunities. We will work to ensure that on-site support and coaching are tailored to the needs of each school and set each team up for success in between school-based support opportunities.

*Deliverables include:*

- A strategic plan that identifies the schools and educators CLI will support
- The crucial levers, tactics, individualized coaching, and leadership goals
- Next steps, owners, and a timetable that will improve instructional practices, strengthen standards-aligned instruction, and increase student learning

## Build and Support Capacity for Instructional Improvement Through Onsite Coaching

Leveraging the data analysis as coaching levers and executing the action steps developed in partnership with district and school leaders through strategic planning, CLI will provide two onsite coaching days per week for 30 weeks that can be used flexibly to support direct teacher coaching and peer coaching and offer school leader support and training workshops.

***Deliverables include:***

*Onsite Days for Job-Embedded Peer Coach and Leader Support*

During onsite coaching and support for peer coaches and school leaders, CLI coaches work one-on-one or with small groups to diagnose instruction against the vision, design effective feedback, enhance an inclusive culture and climate, and apply new skills in their daily context. The focus of support can be on specific leadership skills, coaching moves, participants' beliefs and ways of being, and the impact this all has on school success. CLI coaches will conduct observations, give feedback, and provide personalized recommendations to support implementation. Coaching helps peer coaches and leaders become more reflective practitioners, developing professional habits of mind and leadership expertise.

Peer and leader coaching/support
- establishes a clear vision of high-quality, equitable instruction that supports all children
- establishes the responsibilities and structures for teacher capacity-building and coaching support
- enhances knowledge of data analysis, instructional strategies, and peer coaching
- adopts effective change management practices, goal setting, and short and long-range planning, that maintain alignment and commitment among all stakeholders

*Teacher Coaching*

During direct teacher coaching, CLI coaches work one-on-one or with small groups of classroom teachers to critically examine their instructional practice against the vision, enhance classroom culture and environment, and apply new skills across context and content areas. The focus of support can be on building literacy knowledge, instructional moves, participants' beliefs and ways of being, and the impact this all has on student success. CLI coaches will employ a toolkit of transformational coaching activities, including observation, feedback, lesson planning, shared reading, collegial visits, and modeling to support instructional improvement.

Teacher coaching and support:
- Establishes a clear vision of high-quality, equitable instruction that supports all children
- Ensures the effective implementation of literacy instruction, aligned with the district's overarching vision for academic excellence.
- Enhances knowledge of data analysis and instructional strategies

*Training Workshops*

Facilitated by our team of teaching and learning experts, CLI's specialized series of trainings support educators, coaches, and leaders to increase instructional practice in key areas of learning. Our seminar content library is included in the appendix of our proposal and can be delivered during one of the onsite days. **See the attached training catalog for a full list of CLI training offerings.**

Stepbacks

In all of our partnerships, we incorporate opportunities for taking a step back and reviewing our progress

oward our goals throughout the partnership. As a result, we can work together as partners in mutual accountability, track the status of our implementation efforts, and evaluate the results. Following some time to concentrate on implementation, CLI, district, and school teams conduct Learning Walks to evaluate changes in teacher leadership and instruction as well as to adjust our strategic plan as needed. These stepbacks happen semi-annually and are planned opportunities for stakeholders to collect data, reflect on progress toward strategic plan goals, and adjust the action plan accordingly.

*Deliverables include:*
- A revised strategic plan outlining the progress made towards goals and activities
- New crucial levers and/or tactics that may be identified that will continue to improve strategies, strengthen standards-aligned instruction, and increase child learning

## Evaluation and Reporting

CLI commits to ensuring that the professional development, coaching, and support services delivered to the Henrico Public Schools not only adhere to the highest standards of quality and efficacy but also embrace a diverse range of data reporting. Our comprehensive evaluation and reporting approach encompasses formative evaluations, initial and ongoing evaluations, reporting, and findings. We have established a robust methodology for formative evaluations. We utilize specialized templates to meticulously record coaching data and continuously monitor progress toward their specific goals. Each coaching session is purposefully designed to focus on identified measurable coaching goals, and teacher leaders receive consistent feedback and support on their progress. A transparent and comprehensive report to demonstrate the impact on coaching support, teacher leader development, instructional practice, and student outcomes is provided at the end of the project.

*Deliverables include:*
- Our formative and summative reportings that align instructional data with the criteria set by the school district for school and systems leaders
- Weekly reports provided to the district's Title I specialist and to the principal(s) of the school location where services are provided
- Our final, in-depth outcomes report that includes an overview of services provided aligned to instructional improvements in student performance and test scores
- Thoughtful, programmatic recommendations for the upcoming year

Throughout the scope of work below, you will see how CLI can use all on-site days to support a variety of activities to meet the district's outlined services and the needs of individual school sites. The on-site days are used flexibly to diagnose the state of instruction and provide training, coaching, and support to teachers, peer coaches, and leaders.

|  | Key Deliverable | District Participants | Tasks/Details |
|---|---|---|---|
| **Discovery** | 4-Day District Discovery | District Partners and School Leaders | CLI will meet with district partners to understand the district context and systems-level priorities.<br><br>CLI will meet with the school leadership team to build relationships and learn about the school community to anchor our work together.<br><br>CLI and school leaders will conduct a series of short classroom visits used to build rapport, diagnose instruction, gather information, and establish a shared vision for instruction. |
| **Strategic Planning** | Root Cause Analysis (up to 2 hours) | District Leaders and School Leaders | CLI will analyze all the information collected to uncover both the strengths and areas needing refinement in the learning community.<br><br>CLI will collaborate with district and school leaders to create a plan of action designed to bring about large-scale systematic change across the district that can be translated to a school-level action plan once support schools are assigned.<br><br>Strategic planning will allow all stakeholders to align on a vision of equitable instruction and work together effectively toward the outlined goals. |
| | Strategic Planning Meeting (up to 2 hours) | School Leaders | |
| **Support and Capacity Building** | Onsite Coaching Days - Teachers (up to 6 hour-long sessions per onsite day) | Teachers, District Coaches, and Designated Peer Coaches | Two  on-site days per week for 30 weeks |

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| | Key Deliverable | District Participants | Tasks/Details |
|---|---|---|---|
| **Stepbacks** | Stepback Meeting #1 (up to 3 hours) | District Leaders and School Leaders | CLI and school leaders will come together for a collaborative Learning Walk, conduct a data review, develop a problem of practice, and hold a stepback meeting. |
| | Data Analysis #1 (up to 2 hours) | | CLI will support school-wide ongoing data analysis and instructional response to findings. |
| | Stepback Meeting #2 (up to 3 hours) | | CLI and school leaders will come together for a collaborative Learning Walk, conduct a data review, develop a problem of practice, and hold a stepback meeting. |
| | Data Analysis #2 (up to 2 hours) | | CLI will support school-wide ongoing data analysis and instructional response to findings. |

*Appendix:*

a. Samples of coaching logs and weekly attendance logs;

c. Samples of end-of-year program reports;

d. Samples of any other written materials to be used;

e. Copies of all documents, if any, that would need to be signed by HCPS is awarded the contract.

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Site Binder Log Sheet (in addition to Outlook Calendar
and daily entries in Monday Dashboard)

| Date | CLI | Actual time **IN** | Actual time **OUT** | Offsite Documentation | |
|------|-----|--------------------|----------------------|-----------------------|---|
| | | | | • Time in/out<br>• Location | • Purpose<br>• Person notified |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

**Children's Literacy Initiative**

Teacher_____     Grade_____

Instructional priorities/coaching focus from the strategic plan:

**1. Align on a vision and establish look fors.**
*What will we see/hear if we are meeting the instructional priorities/focus?*

**2. Record initial teacher observations and notes.**

| Strengths: | Opportunities for growth: |
|---|---|
| | |

**3. Set coaching goals.**
*Based on the strategic plan priorities, opportunities for growth, and point of entry for the teacher.*

**4. Design learning experiences.**
*Plan professional development activities to support and build teacher capacity toward our goals.*

| Activity | Date | Resources/materials needed |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

**5. Record successes/evidence of progress toward our goals.**

**6. Reflect on learning and set new goals.**

**Sample CLI Client Status Report for 2023- 2024 School Year**
**As of December 11, 2023**

| Audience | Deliverable | Planned (in RFP) | Completed as of Dec 2023 |
|---|---|---|---|
| Lit Coaches | Collab Days | Monthly (Aug – May, 10) | All have been scheduled, 4 have been completed. On track for completion |
| | Lab Site Days | Monthly (Sept – May, excluding December) | All have been scheduled, 3 have been completed. On track for completion |
| | Support Visits | Monthly (Aug – May, 10) | Emily has completed 8 support visits |
| | Check Ins | Biweekly, 20 per lit coach | Emily has completed 35 check ins with lit coaches |
| Teachers | Seminars | Up to two full day seminars | 1 completed (Close Reading PD) 1 repurposed for asynchronous content creation |
| Principals | Discovery | 1 per school | Complete |
| | Principal Meetings | 3 | 4 scheduled, 2 have been completed |
| | Review of Progress Meetings | 2 | Repurposing 1 for an additional principal meeting, mutually decided to not host 2nd meeting |
| | Leadership Team Meetings | 3 per school | Adams Elementary          1 Belle Ryan Elementary    1 Belvedere Elementary     1 Castelar Elementary        2 Dodge Elementary          1 Druid Hill Elementary       1 Fontenelle Elementary     1 Gomez Elementary          1 Miller Park Elementary  1 Skinner Magnet Center  1 Sunny Slope Elementary 1 |
| | Instructional Learning Walks | 3 per school | Completed: Druid Hill: 1 Highland: 1 |
| CIS Team | Early Literacy Workshops | 4 | All have been scheduled, 2 have been completed |

# CLI PARTNERSHIP TIMELINE
## 2023-2024

Below is a comprehensive list of the activities we will engage in throughout our year of partnership. Each piece of the Core Service Model with CLI offers a targeted and purposeful step in achieving our shared goals.

Missing from this list are leader and educator coaching meetings. These will be scheduled with your coaches throughout the partnership totaling 20 coaching sessions throughout the year.

| August 2023 | | | | Leader Outcome: Shared Vision and Goals |
|---|---|---|---|---|
| **Date** | **Participants** | **Time** | **Activity** | |
| | Leaders | ~1 hr | Intake Meeting | |
| 8/22/23 @ 12:00 or 3:00 | Leaders | 1 hr | PLC | |
| | Leaders | ~3 hrs | Learning Walk | |
| | Leaders | ~3 hrs | Root Cause Analysis + Strategic Planning | |

| September 2023 | | | | Leader Outcome: Framework Grounding |
|---|---|---|---|---|
| Educator + Leader Coaching Begins | | | | |
| Initial Framework Data Collection | | | | |
| ABT Sampled CLASS and COP/TOP Data Collection | | | | |
| 9/12/23 @ 12:00 or 3:00 | Leaders | 1 hr | PLC | |
| Sent via email from ABT | Both | ~30 min | ABT Leader and Educator Survey | |
| 9/27 @ 6-8 pm or 9/30 @ 9-11 am | Both | 2 hr | Virtual Educator Training #1 | |

| October 2023 | | | | Leader Outcome: Coaching Support Schedule |
|---|---|---|---|---|
| 10/10/23 @ 12:00 or 3:00 | Leaders | 1 hr | PLC | |

| November 2023 | | | | Leader Outcome: Coaching Implementation |
|---|---|---|---|---|
| 11/2 @ 6-8 pm or 11/4 @ 9-11 am | Both | 2 hr | Virtual Educator Training #2 | |
| Week of 11/6 from 9 am - 12 pm | Leaders | ~3 hrs | Group Learning Walks | |

| December 2023 | | | | Leader Outcome: Coaching Implementation |
|---|---|---|---|---|
| Interim Framework Data Collection | | | | |
| 12/12/23 @ 12:00 or 3:00 | Leaders | 1 hr | PLC | |

| | | | | |
|---|---|---|---|---|
| **January 2024** | | | | |
| | Leaders | ~3 hrs | Data Analysis + Stepback Meeting Series | |
| 1/9/24 @ 12:00 or 3:00 | Leaders | 1 hr | PLC | |
| 1/30 @ 6-8pm or 2/3 @ 9-11 am | Both | 2 hr | Educator Training #3 | |
| **February 2024** | | | | **Leader Outcome**: Coaching Plans and Schedule |
| 2/13/24 @ 12:00 or 3:00 | Leaders | 1 hr | PLC | |
| **March 2024** | | | | **Leader Outcome**: Coaching Implementation |
| 3/12/24 @ 12:00 or 3:00 | Leaders | 1 hr | PLC | |
| **April 2024** | | | | **Leader Outcome**: Coaching Implementation |
| 4/16/24 @ 12:00 or 3:00 | Leaders | 1 hr | PLC | |
| 4/25 @ 6-8 pm or 4/27 @ 9-11 am | Both | 2 hr | Educator Training #4 | |
| Week of 4/29 @ 9 am-12 pm | Leaders | ~3 hrs | Group Learning Walks | |
| **May 2024** | | | | **Leader Outcome**: Coaching Implementation |
| Final Framework Data Collection | | | | |
| ABT Sampled CLASS and COP/TOP Data Collection | | | | |
| 5/14/24 @ 12:00 or 3:00 | Leaders | 1 hr | PLC | |
| Sent via email from ABT | Both | ~30 min | ABT Leader and Educator Survey | |
| **June 2024** | | | | **Leader Outcome**: Data Driven Reflection |
| 6/11/24 @ 12:00 or 3:00 | Leaders | 1 hr | PLC | |
| | Leaders | ~3 hrs | Data Analysis + Stepback Meeting Series | |

# CLI Partnership Agreement

<mark>[INSERT SCHOOL DISTRICT NAME]</mark>

*Literacy is the very foundation of all learning and the pathway to liberation for every human being.*

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# Who we are

## *Transforming Early Literacy*

Founded in Philadelphia in 1988, Children's Literacy Initiative (CLI) is a national 501(c)(3) non-profit focused on strengthening public education in the United States by ensuring students can read proficiently by the end of third grade. CLI seeks to dismantle structural racism by providing Black and Latinx children with the anti-racist early literacy instruction, support, and advocacy needed to create equity in education.

Learning to read is far more significant than building skills – it is an act of liberation. By helping educators learn high-impact, culturally sustaining instructional strategies and nurturing dynamic professional learning communities, CLI builds lasting capacity in teachers' and principals' schools and systems over time to advance equity in education.

In working with teachers to improve instruction, developing a teacher's instructional expertise impacts student learning and all the children taught throughout a teacher's career.

When catalyzed within our culturally sustaining early literacy model, CLI programs cultivate strong and joyful readers who become lifelong learners.

Through our partnership, we seek to show what is possible when schools have the support necessary to accelerate early literacy learning. Our goal is to support [INSERT CLIENT NAME] to dramatically improve equitable early literacy outcomes for children. We are eager to be part of this robust and integrated approach. This proposal provides the program requirements needed to improve teacher practice, strengthen instructional leadership and accelerate student learning.

## *Our Approach*

<INSERT SUMMARY OF OUR APPROACH TO LEARNING>

This **CLI Partnership Agreement** (the "*Agreement*") is entered into as of the last date signed by the Parties below ("*Effective Date*"), by and between Children's Literacy Initiative, whose principal address is located at 990 Spring Garden Street, Suite 400, Philadelphia, PA 19123 ("*CLI*"), and [INSERT SCHOOL DISTRICT NAME] whose principal address is located at [INSERT SCHOOL DISTRICT ADDRESS, IF AVAILABLE] ("*Partner*"). CLI and Partner are each referred to as a "*Party*" and collectively, as the "*Parties*." In consideration of the mutual promises set forth herein, the Parties hereby agree as follows:

**1. Scope of Services; Acceptance Criteria**
CLI will provide the services described in the Statement of Work ("*SOW*") attached hereto as Exhibit A (the "*Services*") and incorporated herein by reference. The Parties may create additional Statements of Works, each of which upon signing will be deemed a part of this Agreement. A Statement of Work may be amended from time to time by mutual written consent of the Parties.

The Parties may jointly develop a set of specifications for each Deliverable ("*Acceptance Criteria*"). If, as applicable, a Deliverable repeatedly fails to conform to the Acceptance Criteria over a period of thirty (30) days, Partner shall give a written notice to CLI stating the deficiencies, and CLI will, at no cost to Partner, use commercially reasonable efforts to correct any such deficiencies. If the deficiencies are not corrected within thirty (30) days after the date CLI is notified by Partner of such deficiencies, Partner reserves the right to terminate the Agreement upon notice to CLI.

**2. Obligations of the Parties**
Each Party agrees to comply with and fulfil its obligations set forth in Exhibit C ("*Conditions for Success*") attached hereto and incorporated herein by reference.

**3. Payment of Fees**
In consideration for the Services, Partner will pay to CLI the fees as set forth in the applicable Statement of Work (the "*Fees*") on the terms set forth in such Statement of Work.

**4. Term and Termination**
This Agreement will commence on the Effective Date and remain in effect until terminated as set forth herein ("*Term*"). CLI may terminate this Agreement and/or any Statement of Work at will upon ten (10) days prior written notice to Partner or as otherwise set forth herein. Partner may terminate this Agreement: (a) at will, upon ten (10) days prior written notice to CLI, if there is no Statement of Work in effect; (b) at will, upon sixty (60) days prior written notice to CLI, or (c) immediately, for a material breach by CLI that remains uncured for thirty (30) days following written notice thereof to CLI. Termination of this Agreement will terminate all Statement of Work(s) then in effect.

**5. Intellectual Property Rights; Ownership**
CLI is and will remain the sole and exclusive owner of all right, title, and interest throughout the world in and to (a) its pre-existing or independently developed Intellectual Property Rights ("*CLI Pre-Existing IP*") and (b) all Inventions and Deliverables arising from this Agreement or any Statement of Work, and all Intellectual Property Rights embodied therein. For the purposes of this Agreement, "*Deliverables*" means any documents, work product, and materials prepared for Partner by or on behalf of CLI in the course of performing the Services; "*Intellectual Property Rights*" means

all works of authorship, ideas, inventions, discoveries, improvements, and/or concepts, whether patentable or copyrightable or not, including all related intellectual property rights, including, but not limited to, patents, patent applications, including with respect to patents, any patent rights granted upon any reissue, division, continuation or continuation-in-part applications now or hereafter filed, unpatented inventions (whether or not patentable and whether or not reduced to practice), utility models issued or pending, registered and un-registered design rights, copyrights, semiconductor mask works, trade secrets, trade dress, know-how, and other similar statutory intellectual property or industrial rights, as well as applications for any such rights; "*Inventions*" means all inventions, discoveries, concepts, results, works of authorship, ideas, improvements and other innovations of any kind that CLI may make, conceive, develop or reduce to practice, alone or jointly with others, that are embodied in the Services.

CLI hereby grants to Partner a non-exclusive, non-transferable, perpetual and irrevocable (except for breach of this Agreement, including this license), worldwide, fully paid, royalty-free license to (a) the Deliverables solely for Partner's internal purposes, and (b) CLI Pre-Existing IP solely as necessary to use the Deliverables.

Partner will retain all right, title, and interest in and to its pre-existing or independently developed Intellectual Property Rights ("*Partner Pre-Existing IP*"), subject to Partner's grant of the following license. Partner hereby grants CLI a fully paid, royalty free, perpetual and irrevocable (except for breach of this Agreement), worldwide license, with right to sublicense, to make, use, sell, copy, distribute, perform, display, and otherwise exploit such Partner Pre-Existing IP to the extent helpful or necessary (a) to provide the Services and (b) for CLI's exploitation of the Deliverables.

CLI has developed a framework for teaching and learning to assist it in the performance of the Services (the "*Framework*"). CLI may grant Partner access to complete, partially complete, or incomplete ("blank") versions of its the Framework, either in digital or tangible form. Partner agrees that the Framework is the sole and exclusive property of CLI, and Partner does not obtain any ownership rights to the Framework under this Agreement, except for the limited license granted in this Section 5 to the extent that the Framework is incorporated into a Deliverable. Partner will not share, sell, copy, record, reproduce, or prepare derivative works of the Framework, whether complete, partially complete, or incomplete, by any means for any purpose, without CLI's prior written consent in each instance. For the avoidance of doubt, Partner may not use the Framework, for example, by analyzing a class in accordance with the Framework.

Partner further grants CLI a fully paid, royalty free, worldwide license to use the Data (as defined in the DSA) to the extent helpful or necessary to provide the Services. Partner represents and warrants that it has all the rights and consents necessary to grant the foregoing license to CLI.

## 6. Data Sharing Addendum
The Parties agree to abide by the Data Sharing Addendum ("DSA") attached hereto as Exhibit B and incorporated herein by reference.

## 7. Indemnification
The Parties shall at all times defend, indemnify and hold harmless each other and their respective directors, officers, officials, employees and subcontractors, from and against any and all third-party claims, actions, liabilities, losses,

damages, costs and expenses including, without limitation, reasonable attorneys' fees and disbursements, arising out of or relating to (i) any breach or alleged breach of any representation, warranty, covenant or agreement hereunder, or (ii) any injury sustained by any person or to property as a result of any negligent or reckless act or omission or intentional wrongdoing of the other Party, its agents, employees, affiliates, members, directors, officers, officials, or subcontractors.

**8. DISCLAIMER OF WARRANTIES**

**EXCEPT FOR WARRANTIES EXPRESSLY SET FORTH IN THIS AGREEMENT, CLI EXPRESSLY DISCLAIMS ALL OTHER WARRANTIES, TERMS OR CONDITIONS, WHETHER EXPRESS, IMPLIED, OR STATUTORY, REGARDING THE SERVICES AND THE DELIVERABLES, INCLUDING ANY WARRANTIES OF MERCHANTABILITY, TITLE AND FITNESS FOR A PARTICULAR PURPOSE. EACH PARTY ACKNOWLEDGES THAT IT HAS RELIED ON NO WARRANTIES OTHER THAN THE EXPRESS WARRANTIES SET FORTH IN THIS AGREEMENT.**

**9. LIMITATION OF LIABILITY**

**IN NO EVENT WILL EITHER PARTY BE LIABLE FOR ANY INCIDENTAL, INDIRECT, EXEMPLARY, SPECIAL, PUNITIVE OR CON-SEQUENTIAL DAMAGES, UNDER ANY CIRCUMSTANCES. CLI'S AGGREGATE CUMULATIVE LIABILITY HEREUNDER, WHETHER IN CONTRACT, TORT, NEGLIGENCE, MISREPRESENTATION, STRICT LIABILITY OR OTHERWISE, WILL NOT EXCEED THE TOTAL AMOUNT OF COMPENSATION PAID TO CLI PURSUANT TO THE APPLICABLE STATEMENT OF WORK.**

**10. Recruitment and Hiring Practices**

Neither Party will make an offer of employment to a current employee of the other for a period of employment which begins during the current year (i.e. July 1 to June 30) of the Term of the Agreement. Both Parties may make offers of employment for the following school year, and receive applications throughout the school year to be retained for consideration for future positions for the following school year.

Criminal History Record Information (CHRI) fingerprint background check is completed for all staff members at least 18 years of age who are or will be working at Partner's property on a regularly scheduled basis, to determine whether any such person has been convicted of a crime, as specified in P.L. 2000, c. 77 and that said check indicates that no criminal history record information exists on file in either the Identification Division of the Federal Bureau of Investigation or the State Bureau of Identification which would disqualify said employee from employment pursuant to law or that the check reveals a disqualifying offense and the individual has demonstrated rehabilitation. All of the above information must be on file with MPTCS within two weeks of the person working at MPTCS.

**11. Miscellaneous**

a)  **Entire Agreement**. This Agreement contains the entire agreement between the Parties with respect to the transaction contemplated by this Agreement and supersedes all prior agreements and understandings between the Parties with respect to such transaction. It may be executed in any number of counterparts, each of which shall be deemed an original, but such counterparts together shall constitute only one and the same instrument.

b)  **Legal Enforceability**. Any provision of this Agreement which is found to be unenforceable shall not affect the enforceability of the remaining provisions hereof.

c) **Assignment**. This Agreement may not be assigned by either Party without the prior written consent of the other Party, expect that CLI may assign this Agreement to a to successor of all or substantially all of the assets of CLI through merger, reorganization, consolidation, or acquisition.

d) **Amendment**. This Agreement may not be amended or modified, except expressly by an instrument signed by each of the Parties.

e) **Notices**. Any notice or other communication required or permitted hereunder shall be deemed to be properly given when sent via electronic mail (e-mail) or when deposited in the U.S. mails for transmission by certified or registered mail, postage prepaid to the addresses in this Agreement.

f) **Non-Discrimination** CLI agrees not to discriminate in its employment practices, and will render services under this contract without regard to race, color, religion, gender, gender identity or expression, national origin, veteran status, political affiliation, genetic information, pregnancy, sexuality, or disabilities. Any act of discrimination committed by CLI or failure to comply with these statutory obligation when applicable shall be grounds for termination of this contract.

g) **Compliance with Law**: CLI shall comply with any and all federal, state or local laws in effect or hereinafter promulgated which apply to its provisions of the Service herein specified.

h) **Controlling Law and Venue.** The validity, interpretation, and performance of this Agreement shall be construed under and enforced in accordance with the laws of the State of [INSERT STATE IN WHICH PARTNER IS LOCATED]. All disputes hereunder shall be resolved in the applicable state or federal courts of State of [INSERT STATE IN WHICH PARTNER IS LOCATED]. The Parties consent to the jurisdiction of such courts, agree to accept service of process by mail, and waive any jurisdictional or venue defenses otherwise available.

i) **Mediation.** Any controversy or claim arising out of or relating to this Agreement, or the breach thereof shall be settled by a mediator in the[INSERT COUNTY AND STATE IN WHICH PARTNER IS LOCATED], in accordance with the standard procedures for mediation.

j) **Waiver.** No waiver by either Party of any default shall be deemed as a waiver of any prior or subsequent default of the same or other provisions of this Agreement.

k) **Severability.** If a court finds any provision of this Agreement invalid or unenforceable as applied to any circumstance, that provision will be enforced to the maximum extent permitted by law, and the other provisions will remain in full force and effect.

l) **Independent Contractor.** CLI and Partner are independent contractors with respect to one another and neither Party's employees will be considered employees of the other Party for any purpose. This Agreement does not create a joint venture or partnership for any purpose, and neither Party has the authority to bind the other to any third party.

m) **Counterparts**. This Agreement may be executed in two or more counterparts, each of which will be deemed an original, but all of which together will constitute one Agreement.

n) **Survival**. The provisions specified in this Agreement to survive, or that by their nature should survive, shall remain in effect after the termination of this Agreement or the applicable Term, including, without limitation, Sections 5, 7, 8, 9 and 11 will survive the expiration and termination of the Term.

_____

SIGNATURE

_____

DATE

_____

PARTNER LEADER NAME & TITLE

_____

SIGNATURE

_____

DATE

_____

CLI STAFFER NAME & TITLE

# Exhibit A

# Statement of Work

This **Statement of Work** ("*SOW*") is entered into as of the last date signed by the Parties below ("*SOW Effective Date*"), by and between Children's Literacy Initiative ("*CLI*") and [INSERT SCHOOL DISTRICT NAME] ("*Partner*") and is governed by the CLI Partnership Agreement (the "*Agreement*") entered into between CLI and Partner on [INSERT AGREEMENT EFFECTIVE DATE].

All terms not otherwise capitalized herein shall have the meanings assigned to them in the Agreement. In case of any conflict between the terms of the Agreement and the terms of this SOW, the terms of the Agreement shall control.

CLI will provide the Services outlined below:

| *Teacher Development* |
|---|
| [Insert Service description. See glossary for more details. To add additional rows, click the plus button located at the bottom of this textbox.] |
| |

| *Building & District Leadership Development* |
|---|
| [Insert Service description. See glossary for more details. To add additional rows, click the plus button located at the bottom of this textbox.] |
| |

| *Anti-Racist Early Literacy Resources* |
|---|
| [Insert Service description. See glossary for more details. To add additional rows, click the plus button located at the bottom of this textbox.] |
| |

| Caregiver Engagement |
|---|
| [Insert service description. See glossary for more details. To add additional rows, click the plus button located at the bottom of this textbox.] |

For a list of services CLI provides to its clients, please see Appendix A to this SOW (*Glossary of Services*).

# Fees

| Administrative Cost (15%) |
|---|
| Keeping in line with the "gold-standard" in non-profits, with 85% of all costs allocated to direct services, CLI includes 15% in administrative costs to all its projects to cover overhead associated with running an organization (e.g. rent, utilities, research and development, executive salaries, marketing, etc.). |

| Budget | |
|---|---|
| **Direct Project Costs**<br>[Insert any description of what would be considered a Direct Project Cost.] | [Insert dollar amount] |
| **Administrative Fee**<br>[Insert any description of what would be considered an Administrative Fee.] | [Insert dollar amount] |

## Changes to Scope of Services Early Literacy

CLI and Partner recognize that the scope of Services may need to be adjusted based on teacher and student data in order to maximize impact. Any alteration to the above scope of Services must be agreed to in writing by both Parties in advance of Services rendered.

# Payment Terms

1) The Partner shall pay CLI $TOTAL AMOUNT OF INDIRECT AND ADMIN COSTS upon receipt of CLI's invoice prior to the commencement of the Services for fixed costs associated with the Services.

2) The remaining balance, totaling $DIRECT SERVICE AMOUNT, (the "*Direct Service Amount*") will be paid by Partner in arrears in four installments of $QUARTERLY AMOUNT, each, on the following dates:

If at year-end, it is mutually agreed between CLI and Partner that the Services did not fully meet the Acceptance Criteria jointly developed by the Parties in writing, either Party may propose a change in scope of Services with specific and well-defined actions required to address the failure to fully meet the Acceptance Criteria, which CLI may accept or reject in its sole discretion. If the failure fully meet the Acceptance Criteria was attributable solely to CLI's actions or inactions and at no fault of Partner, the Direct Service Amount will be pro-rated to account for any such failure to meet the Acceptance Criteria in an amount mutually agreed upon in writing between the Parties.

# Acceptance Criteria

[Insert Acceptance Criteria mutually agreed upon between the Parties, if any]

# Term

Expected Start Date: [Insert start date of engagement]
Expected End Date: [Insert end date of engagement]

# Termination

Partner may terminate this SOW at will upon sixty (60) days prior written notice to CLI. CLI may terminate this SOW upon ten (10) days prior written notice to Partner.

In the event of a no cause termination of this SOW by either Party, the amount paid CLI under this SOW will be prorated to the date of termination, and CLI will refund to Partner any overpayment.

# Data

Partner shall provide the Data identified on <u>Appendix A</u> ("*Data Sharing Outline*") of <u>Exhibit B</u> to the Agreement and all other Data requested by CLI before [INSERT DATE].

[signature page follows]

990 Spring Garden Street, Suite 400       T: 225.561.4676
Philadelphia, PA 19123                     F: 215.561-4677

SIGNATURE PAGE TO STATEMENT OF WORK

_____          _____

SIGNATURE                                SIGNATURE


_____          _____

DATE                                     DATE


_____          _____

PARTNER LEADER NAME & TITLE              CLI STAFFER NAME & TITLE

# Appendix A to Exhibit A (Statement of Work)

# Glossary
# of Services

## *Teacher Development*

+ **Seminars**
Seminars for teachers focused on research-based instructional practices linked to improved student early literacy. Teachers have the opportunity to learn best practices, observe video demonstrations, and engage with each other, focused on building understanding.

+ **Principal Meetings**
Participating principals come together several times a year to learn the competencies of effective early literacy leadership, including learning the key look-fors of research base practice and providing actionable feedback for improvement.

+ **Leadership Team Meetings**
School centered quarterly meeting with the Literacy Leadership Team (Principal, AP, Literacy Coach, ELS, CLI Regional Manager). Review of implementation successes, challenges, strategic action planning, & student data review.

+ **Review of Progress Meeting**
Structured opportunities for literacy coaches, site leaders and district administrators to examine evidence of progress, identify areas of strength and areas for improvement. ROPs occur 2 times per year to serve as a mid-course and end-of-year review.

## *Building & District Leader Development*

+ **ELS & PD Coaching**
Direct coaching support from a full-time Early Literacy Specialist for the teachers in seven participating schools, and a Professional Developer at North Lauderdale Elementary. All CLI coaches are experienced teachers with deep early literacy and coaching expertise.

+ **Lesson Study Cycle**
Lesson study is a Japanese model of teacher-led, long term professional development & research in which teams collaboratively plan, research, and study their lesson instruction as a way to determine how students learn best. Lesson study allows teachers to take ownership over lesson design and shift focus from teacher's actions to students' responses.

## Anti-Racist Early Literacy Resources

+ **Collaboration Days**

   During Collaboration Days, coaches have the opportunity to hone their teaching and coaching skills in a classroom environment with the support of their peers and CLI. Collaboration days also provide coaches an opportunity to observe CLI coaching sessions and engage in conversations regarding how best to target coaching to meet the needs of classrooms.

+ **Caregiver Engagement Events**

   Two times per year, schools are assisted to conduct a Family Literacy Night. Parents and guardians learn the basics of reading development, how to select "just-right" books, and how to use read aloud time as an opportunity to foster a love of reading and learning. Families take home a book and related materials.

+ **Literacy Materials**

   High-quality books and materials provided to classrooms in order to improve literacy environments and access to resources where needed.

# Exhibit B

# Data Sharing Agreement

This DSA has the following overriding goals:

1. Preserving the anonymity of student identities, through the use of proxy identifiers, including assurance that identifiable student data is not released to third parties. Student confidentiality is protected via proxy identifiers that provide CLI information for analysis based on aggregate data, but protects the identity of individual students and

2. Enhancing the ability of Partner and CLI to improve professional development for Partner teachers by allowing CLI to conduct surveys of teachers and principals and to receive K-3 student level longitudinal data (i.e., multiple administrations of the same assessment, where available to track growth) at mid-year (after mid-year assessments) and end of year (see Appendix A for all data requested).

**NOW, THEREFORE, THE DISTRICT AND CLI AGREE AS FOLLOWS:**

**I. OBLIGATIONS OF CLI**

CLI, representing all members of the organization, shall use commercially reasonable efforts to ensure the confidentiality of student data provided to CLI by or on behalf of Partner (the "*Data*") through the following methods:

a. CLI shall reasonably comply with all state and federal laws that apply to the use and release of the Data, including but not limited to FERPA and its regulations, set forth at 34 C.F.R. § Part 99.

b. CLI shall comply with the re-disclosure limitations set forth in FERPA, including 34 C.F.R. § Part 99.33.

c. CLI shall use commercially reasonable efforts to restrict access to the Data only to (i) the person or persons who provide direct services to Partner teachers; or (ii) the person or persons within CLI's organization who have been tasked with analyzing the Data; and make those persons aware of, and agree to abide by, the terms set forth in this Agreement.

d. CLI shall use commercially reasonable efforts not to release or otherwise reveal, directly or indirectly, the Data to any individual, agency, entity, or third party not included in this Agreement, unless such disclosure is required by law or court order.

e. CLI shall not use Data shared under this Agreement for any purpose other than the goals outlined in this Agreement. Nothing in the Agreement shall be construed to authorize CLI to have access to additional data from Partner that is not included in the scope of the Agreement (or addenda). CLI understands that the Agreement does not convey ownership of the Data to CLI.

f. CLI shall take commercially reasonable security precautions and protections to ensure that persons not authorized to view the Data do not gain access to the Data. Commercially reasonable security precautions and protections include, but are not limited to:

1. Creating, distributing, and implementing data governance policies and procedures which protect the Data through appropriate administrative, technical, and physical security safeguards, and outline staff responsibilities for maintaining data security;

2. Establish and enforce well-defined data privilege rights which restrict users' access to the Data necessary for them to perform their job functions;

3. Securing access to any physical areas/electronic devices where sensitive Data are stored;

g. CLI shall report all known or suspected breaches of Data, in any format, to the District within forty-eight hours of learning of the breach. The report shall include (1) the name, job title, and contact information of the person reporting the incident; (2) the name, job title, and contact information of the person who discovered the incident; (3) date and time the incident was discovered; (4) nature of the incident (e.g., system level electronic breach, an electronic breach of one computer or device, or a breach of hard copies of records); (5) a description of the information lost or compromised; (6) name of electronic system and possible interconnectivity with other systems; (7) storage medium from which information was lost or compromised; (8) controls in place to prevent unauthorized use of the lost or compromised information; (9) number of individuals potentially affected; and (10) whether law enforcement was contacted.

h. CLI shall use commercially reasonable efforts to securely and permanently destroy the Data, and any and all hard and soft (electronic) copies thereof, upon the termination of this Agreement. CLI agrees to require all employees, contractors, or agents of any kind using the Data to comply with this provision. CLI agrees to document the methods used to destroy the Data, and upon request, provide certification to Partner that the Data has been destroyed.

i. CLI has the right consistent with scientific standards, to present, publish, or use student results it has gained in the course of its analysis, but only if the publication, presentation, or use does not include personally identifiable information of parents, students, or teachers.

j. Should CLI present, publish, or use student results it has gained in the course of its analysis, Requestor shall adhere to the following terms:

1. CLI shall not publish, present, or use reports that include a cell size of less than 10. Reports must mask these cells so that the results are not revealed.

2. Publications and reports of Data, including preliminary descriptions and draft reports, shall involve only aggregate Data and no personally identifiable information or other information that could lead to the identification of any student, parent, or teacher.

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3. CLI shall provide Partner, free of charge, a copy of any report that is generated using the Data upon the Partner's request.

## II. OBLIGATIONS OF PARTNER

During the Term of this Agreement, Partner shall:

a. Prepare and deliver the Data as further set forth in Appendix A to this Exhibit B, in the timeline agreed upon in advance.

- Data File Description. All items will be keyed to a "proxy" student identifier that is different from the official student ID. The link between the official and proxy IDs will not be disclosed by Partner. Partner will not provide any personally identifiable information to CLI.

# Appendix A to Exhibit B (Data Sharing Agreement)
# Data Request Outline

CLI is requesting, and Partner shall provide, {grade range} student level longitudinal data (i.e., multiple administrations of the same assessment, where available to track growth) at mid-year (after mid-year assessments) and end of year. CLI is requesting, and Partner shall provide, {last school year} data and {current school year} at mid-year and end of year, including the following variables:

1) School variables
   a. Grade (grade range)
   b. School
   c. Teacher (names and email addresses)
2) Demographics/student characteristics
   a. Student race/ethnicity
   b. Student sex
   c. Student SES
      i. Free/reduced lunch
      ii. Other socioeconomic variables, if available
   d. Student ELL (and/or bilingual) status
   e. Student IEP status
   f. Student attendance
   g. Student disciplinary data
      i. Suspensions
      ii. Referrals
3) Assessments (all administrations), such as:
   a. DRA (K-5, applicable grades)
   b. EDL (K-3, applicable grades)

Partner shall provide such assessments prior to the commencement of the Services under any SOW and regularly following the termination or earlier expiration of any SOW.

# EXHIBIT C
# Conditions for Success

At CLI we're eager to ensure your investment in our services yields the strongest possible impact for the students you serve, and the educators you employ. We know a strong partnership, with clear commitments to each other is vital to project success. Below we've outlined the commitments we at CLI will make to our clients, and in turn the commitments we're hoping you'll make to us.

**CLI Obligations:**

At CLI we agree to:

- **Maintain the integrity and privacy of any student data you share**– We are committed to supporting you as you comply with local and federal student data privacy and online safety regulations. We also care about employing data privacy and sharing best practices to promote students' health and wellbeing. (see "data sharing agreement" for additional details on our commitment to you)
- **Formally communicate mutually agreed upon programmatic changes in writing, as they occur** – We want to ensure both Parties are always clear about next steps, goals and outcomes, especially in cases where they evolve throughout the course of the project.
- **Utilize a rigorous recruitment and selection process to hire coaches and project staff** – We know that high-quality coaches are a key to project success.
- **Develop and deliver ongoing trainings (at least monthly) to coaches** – Not only do we want to find great talent, but we strive to continuously improve the practices of our staff, and stay abreast of best practices.
- **Deeply understand the context of our clients, including understanding the community of children and caregivers you serve, and the educators you employ** – We know that no two clients are alike, and we want to ensure our services are customized to meet the particular needs of the communities we serve.

**Shared Obligations:**

Both Parties agree to:

- **Engage in consistent and responsive two-way communication** - Communication is the cornerstone of a strong partnership and ensures the project can proceed efficiently and effectively. Where possible, we commit to responding to each others' inquiries within two business days.

**Partner Obligations:**

Partner agrees to:

- **Provide CLI with access to curricular resources** – This enables CLI staff to support educators' effective implementation of the curricular resources being used by your school or district

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- **Provide CLI with access to school schedules, in particular information about the master literacy block schedule** –This enables our coaches' to thoughtfully plan and schedule time with educators, and enables our interventionists to schedule time with students
- **Provide CLI coaches/interventionists with work space in Partner's** buildings – This allows CLI staff to spend their mindshare on supporting your educators, instead of figuring out tactically where to meet or conduct work. Ideally coaches and interventionists would have dedicated space to work and store belongings.
- **Provide CLI with information about the roster of educators in each of Partner's school buildings** - This data enables CLI to thoughtfully plot out how coaching and other services will be delivered, and to track what has been delivered to whom. See data requirements above in Online Data Request section.
- **Provide CLI with access to student data** – This helps our team assess whether we're moving the needle against goals and measures you care about, and enables our team to see where we're making progress, learn more about where we're encountering obstacles, and plan ways to overcome challenges. (See CLI's "data sharing agreement" for more information).

- **Provide CLI coaches/interventionists access to printers/copiers** –This enables school-based CLI staff to quickly access print materials needed to facilitate strong meetings with educators, and to successfully teach, demo and/or co-teach lessons to students.
- **Provide details about upcoming CLI hosted events a month in advance** – At CLI we deliver our strongest training when we have time to understand what content is needed, who the attendees are, and what physical (or virtual) space we'll be using to deliver the training.
- **Provide CLI staff with opportunities to attend applicable Partner-trainings and/or gain awareness of major Partner initiatives related to literacy** –This enables the CLI team to make sure our initiatives are aligned with yours, and that we're on the same page in communicating with your educators.

# CDIES FY24

## Training Survey

All Time ⌄

72

# This training was a valuable use of my time. (Year to Date)
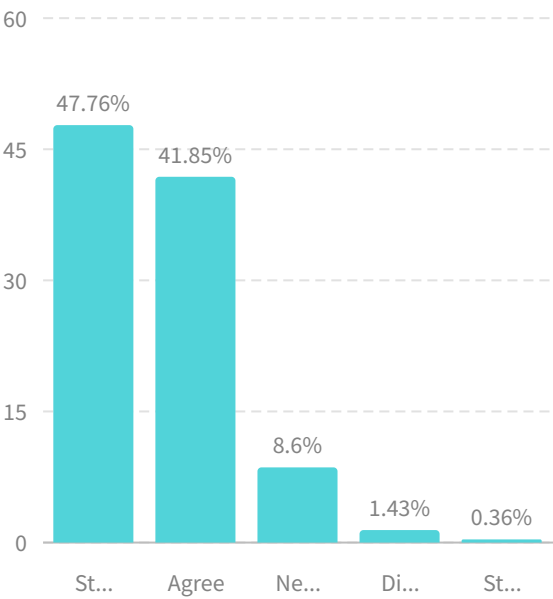
● This training was a valuable use of my time.

# This training was a valuable use of my time. (Last Week)
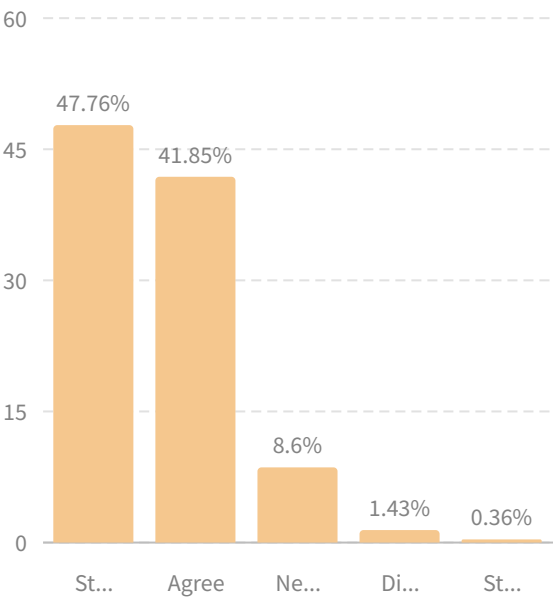
● This training was a valuable use of my time.

# The objectives for this training have been met upon completion. (Year to Date)

All Time ∨
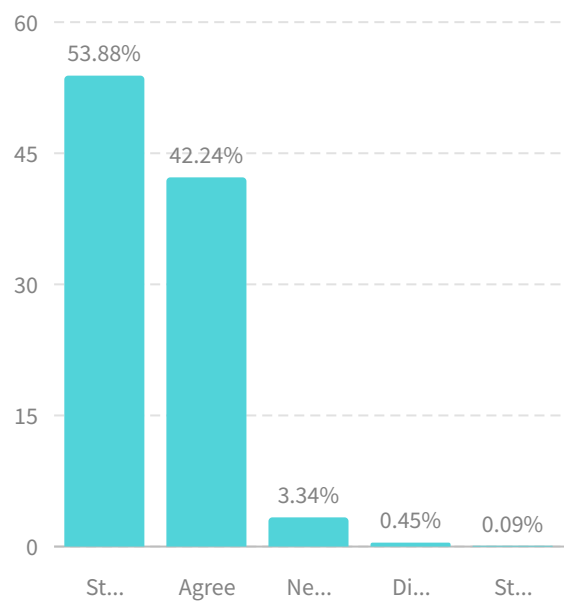


● The objectives for this training have been met upon co

# The objectives for this training have been met upon completion. (Last Week)
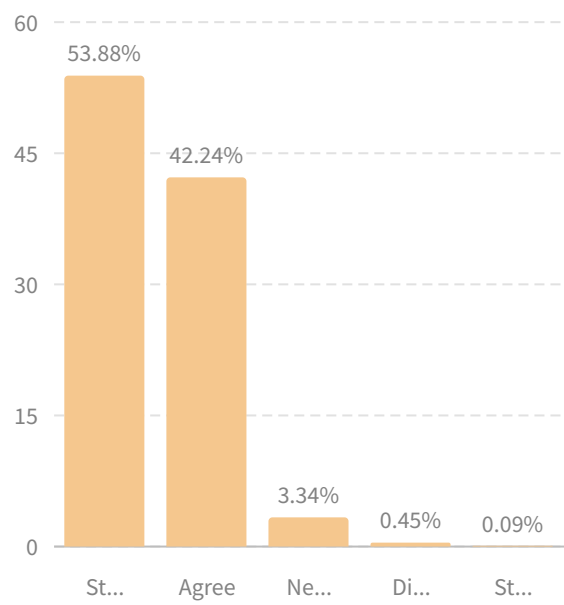
60 ─────────────────────────────────────

53.88%

45 ─ ─ ─ 42.24% ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─

30 ─────────────────────────────────────

15 ─────────────────────────────────────

3.34%

0         0.45%      0.09%

St...    Agree    Ne...    Di...    St...

● The objectives for this training have been met upon con

## The training session was well organized and engaging. (Year to Date)

All Time ⌄
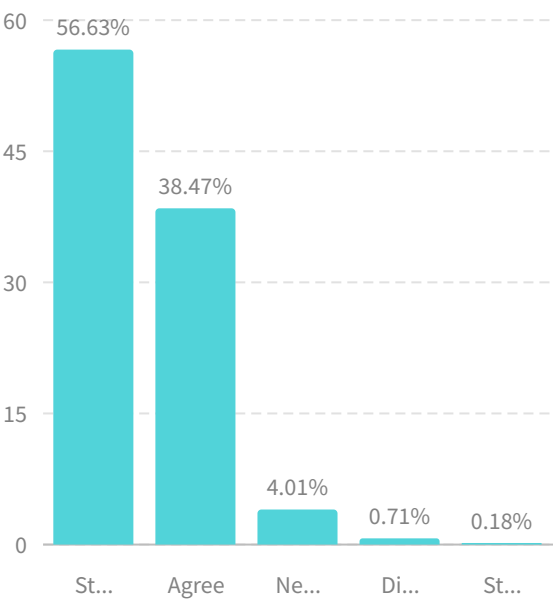


● The training session was well organized and engaging.

## The training session was well organized and engaging. (Year to Date)

# The training session was well organized and engaging. (Last Week)
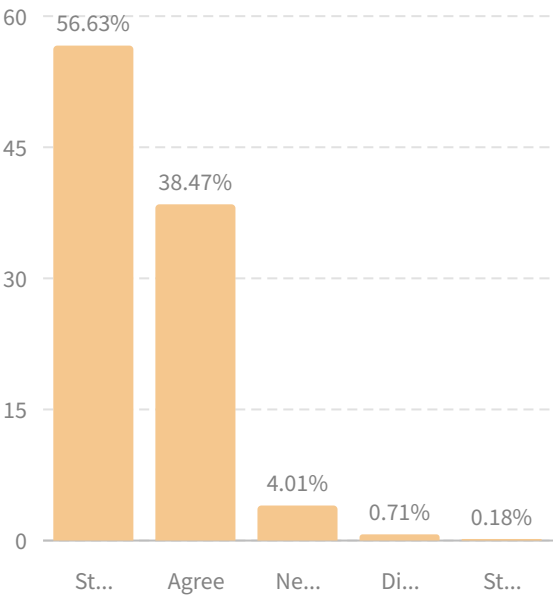
- The training session was well organized and engaging.

# This session was facilitated well. (Year to Date)

All Time ∨



Chart values:
- St…: 59.45%
- Agree: 35.03%
- Ne…: 4.55%
- Di…: 0.89%
- St…: 0.09%
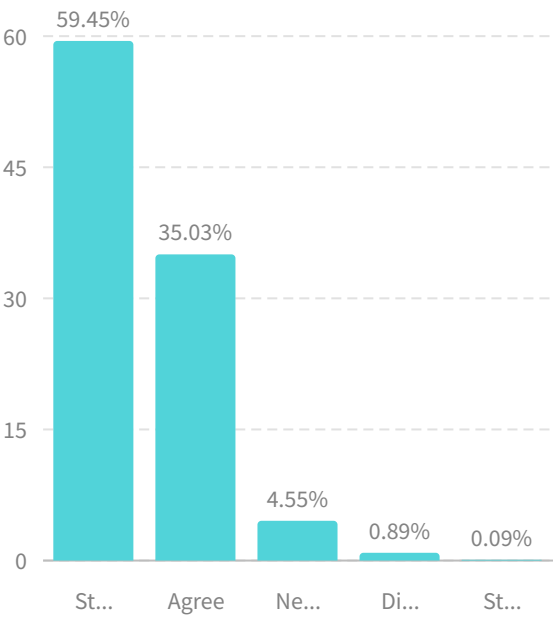
● This session was facilitated well (e.g., the facilitator(s) v

# This session was facilitated well. (Last Week)

| | | | | |
|---|---|---|---|---|
| 59.45% | 35.03% | 4.55% | 0.89% | 0.09% |
| St... | Agree | Ne... | Di... | St... |
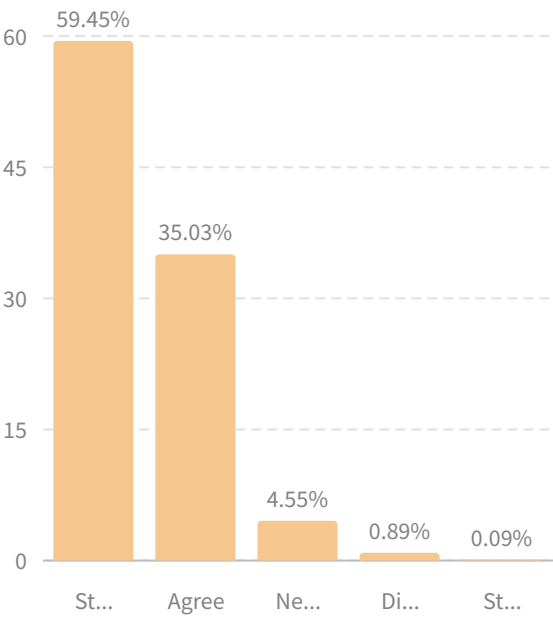
● This session was facilitated well (e.g., the facilitator(s) v

# I can see how my students will benefit from what I learned in this training. (Year to Date)

All Time ⌄



49.5%
42.87%
6.45%
1.09%
0.09%

60
45
30
15
0

St...   Agree   Ne...   Di...   St...

● I can see how my students will benefit from what I learn

# I can see how my students will benefit from what I learned in this training. (Year to Date)

All Time ⌄

81

# I can see how my students will benefit from what I learned in this training. (Last Week)
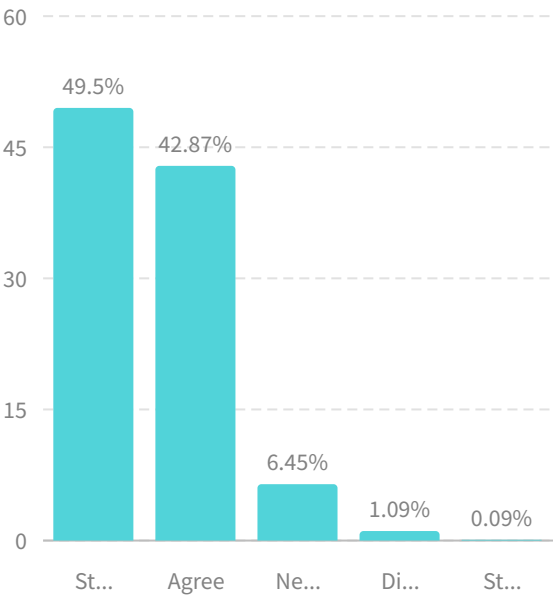
● I can see how my students will benefit from what I learn

# I can see how my students will benefit from what I learned in this training. (Last Week)
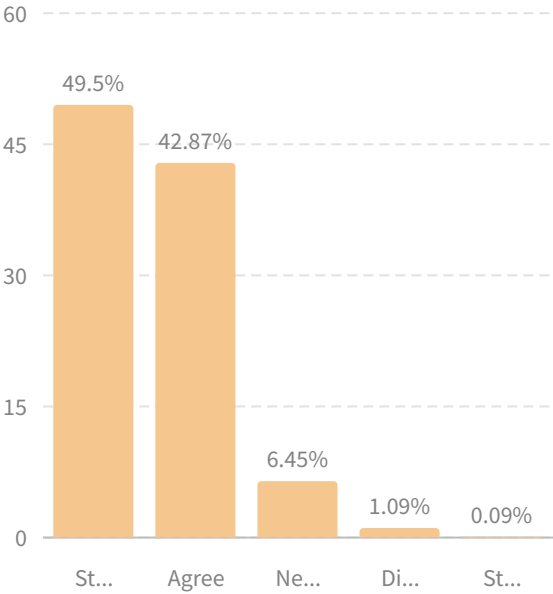
# The learnings from this training are readily applicable to my role and practice. (Year to Date)

All Time ∨

49.77%
43.98%
5.52%
0.54%
0.18%

60
45
30
15
0

St...    Agree    Ne...    Di...    St...
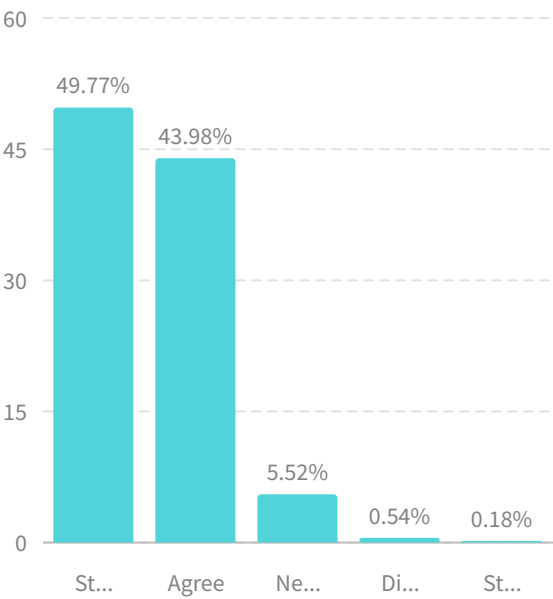
● The learnings from this training are readily applicable t

# The learnings from this training are readily applicable to my role and practice. (Last Week)
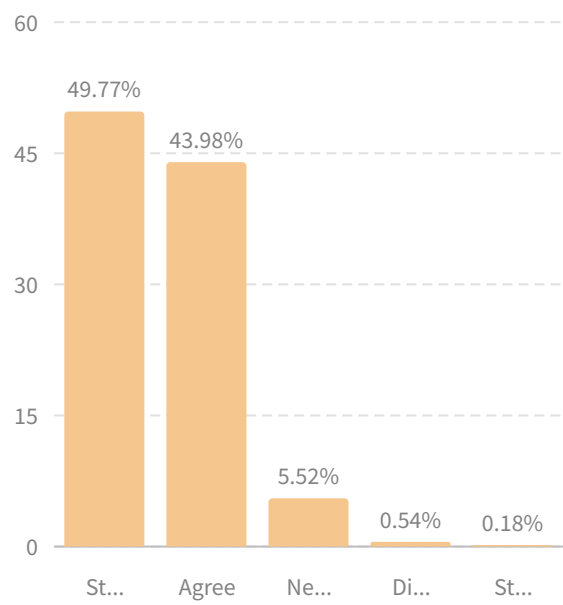
- ● The learnings from this training are readily applicable t

# I am leaving this training with a stronger understanding of the topics covered. (Year to Date)

All Time ⌄

45.81%
42.54%
9.36%
2.03%
0.26%

St...   Agree   Ne...   Di...   St...
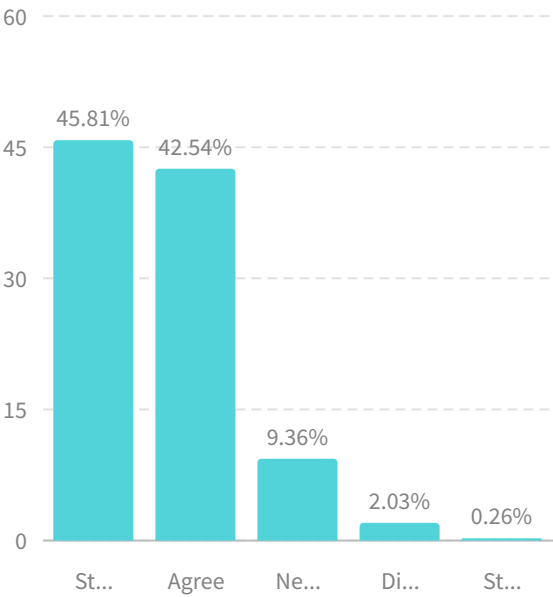
● I am leaving this training with a stronger understanding

# I am leaving this training with a stronger understanding of the topics covered. (Last Week)

All Time ⌄



45.81%
42.54%
9.36%
2.03%
0.26%

60
45
30
15
0

St...   Agree   Ne...   Di...   St...
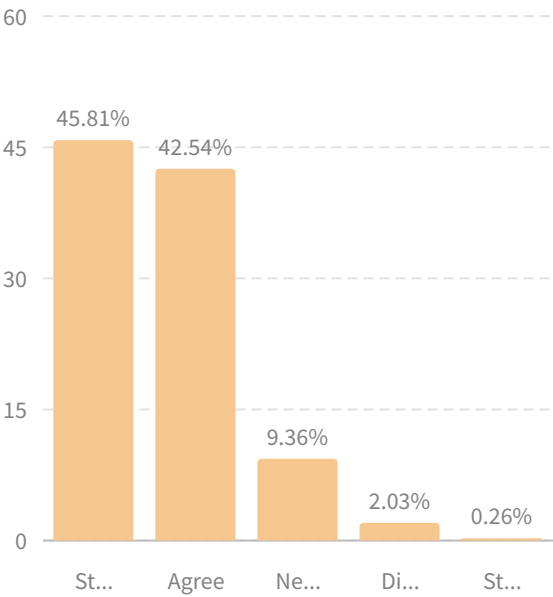
● I am leaving this training with a stronger understanding

## I feel prepared to implement what I've learned from this training in my role and practice. (Year to …

All Time ⌄
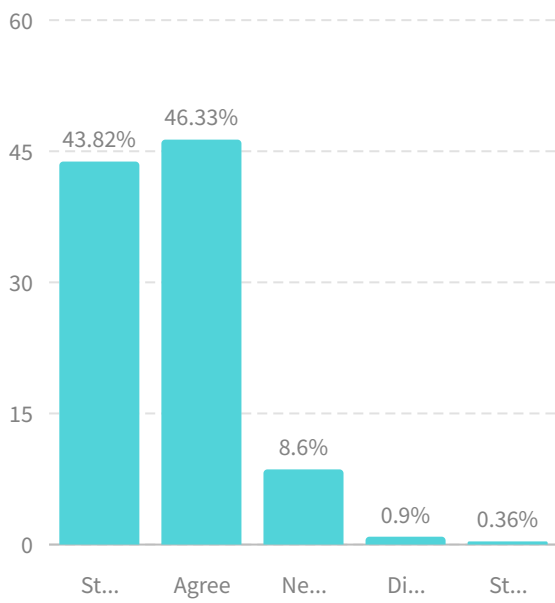


● I feel prepared to implement what I've learned from thi

## I feel prepared to implement what I've learned from this training in my role and practice. (Last We…

All Time ⌄



60

45 — — — — — — — — — — — — — — — — — — —

46.33%

43.82%

30

15

8.6%

0.9%    0.36%

0

St…    Agree    Ne…    Di…    St…

● I feel prepared to implement what I've learned from thi

# Additional Comments - Training Survey
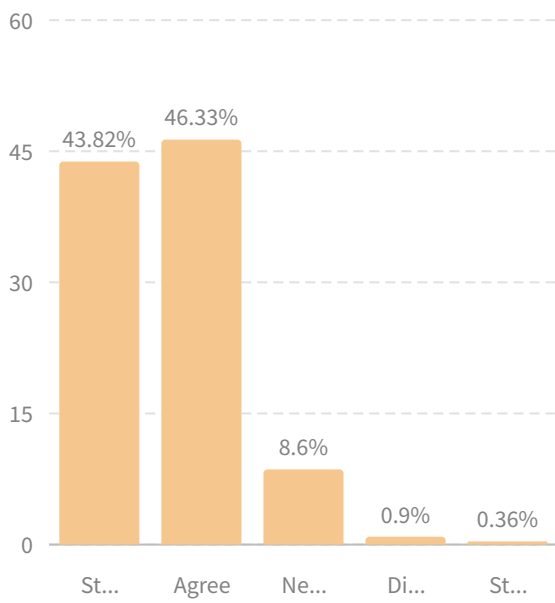
All Time ⌄

# Learning Walk Survey

# This Learning Walk was a valuable use of time. (Year to Date)
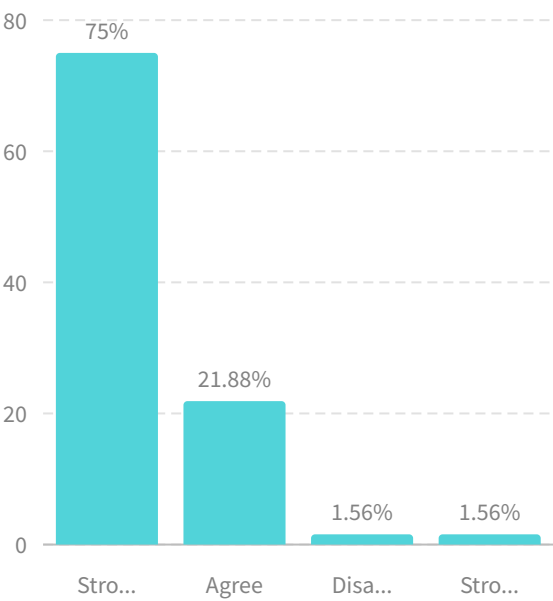
● This Learning Walk was a valuable use of time.

## This Learning Walk was a valuable use of time. (Last Week)
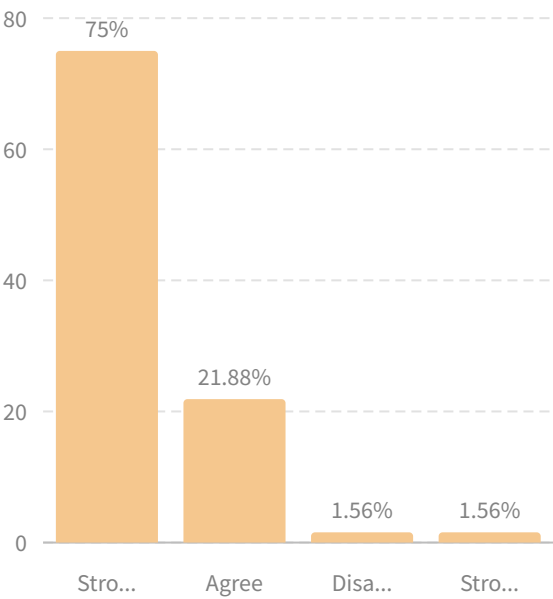
● This Learning Walk was a valuable use of time.

# This time was well structured and facilitated. (Year to Date)
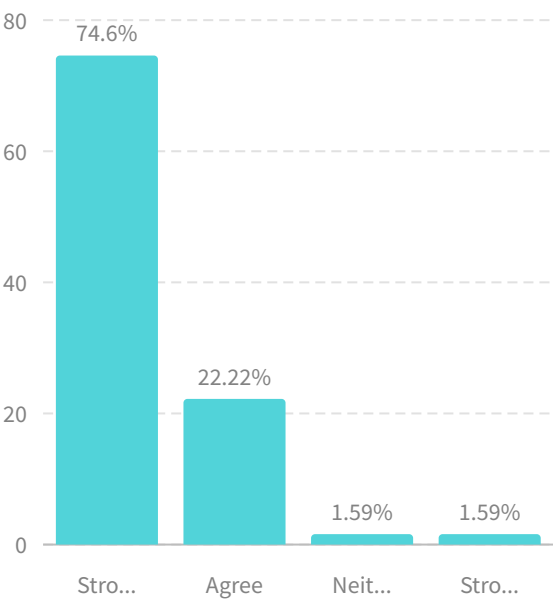
All Time ∨



This time was well structured and facilitated.

# This time was well structured and facilitated. (Last Week)
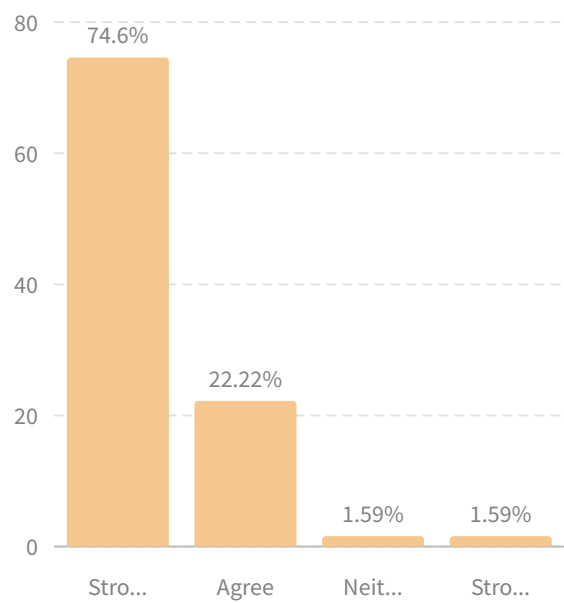
- This time was well structured and facilitated.

# I feel prepared and confident to implement what I've learned from this time to support my work. …

● I feel prepared and confident to implement what I've le

# I feel prepared and confident to implement what I've learned from this time to support my work. …

All Time ⌄

```
80 ┈┈┈┈┈┈┈┈┈┈┈┈┈┈┈┈┈┈┈┈┈┈┈┈

        63.16%
60 ┈┈┈┈┈┈┈┈┈┈┈┈┈┈┈┈┈┈┈┈┈┈┈┈
      ┌──────┐
      │      │
      │      │  33.33%
40 ┈┈┈│┈┈┈┈┈┈│┈┈┈┈┈┈┈┈┈┈┈┈┈┈
      │      │ ┌──────┐
      │      │ │      │
20 ┈┈┈│┈┈┈┈┈┈│┈│┈┈┈┈┈┈│┈┈┈┈┈┈
      │      │ │      │
      │      │ │      │  3.51%
 0 ───┴──────┴─┴──────┴─┌──────┐──
     Strong...   Agree   Neithe...
```

● I feel prepared and confident to implement what I've le

96
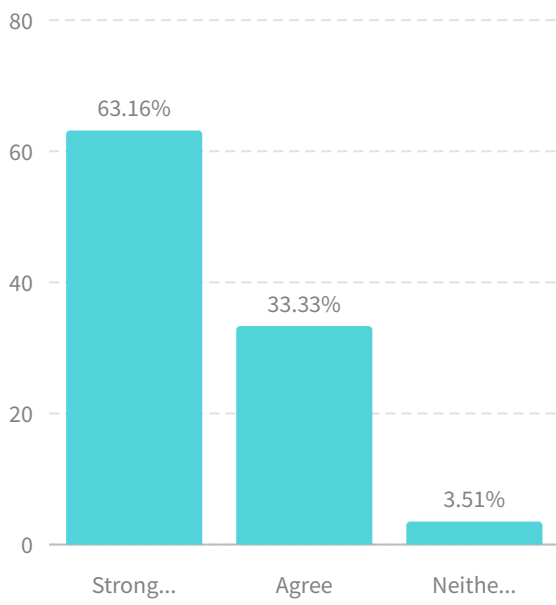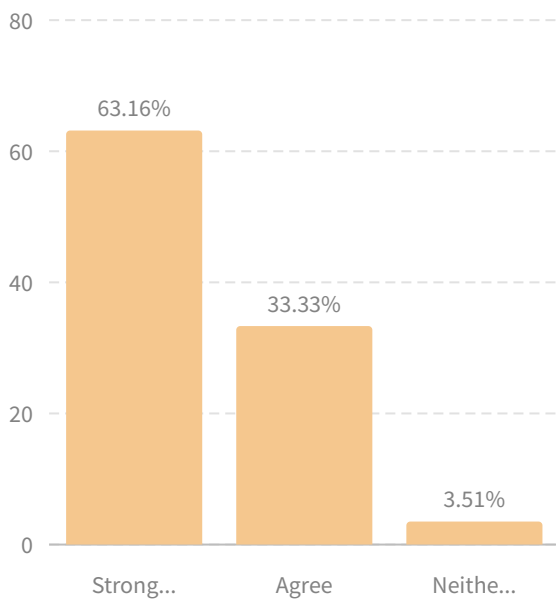
# The learnings from this time will positively impact my practice to improve instruction. (Year to Da...

All Time ⌄
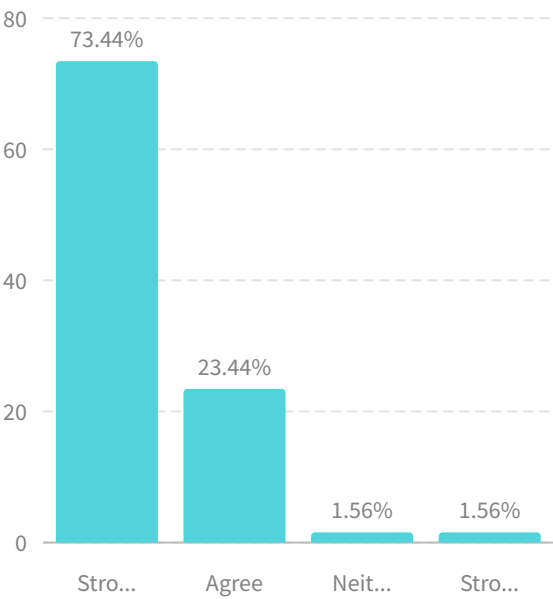


73.44%

23.44%

1.56%    1.56%

80

60

40

20

0

Stro...    Agree    Neit...    Stro...

● The learnings from this time will positively impact my p

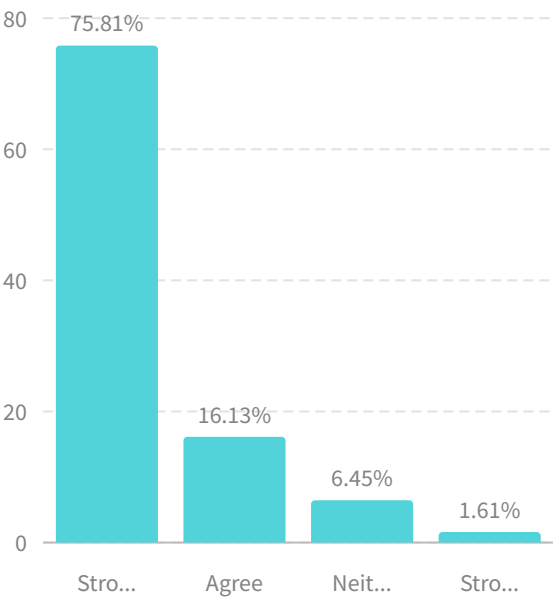# The learnings from this time will positively impact my practice to improve instruction. (Last Week)

All Time ⌄

73.44%

23.44%

1.56%    1.56%

80

60

40

20

0

Stro...    Agree    Neit...    Stro...
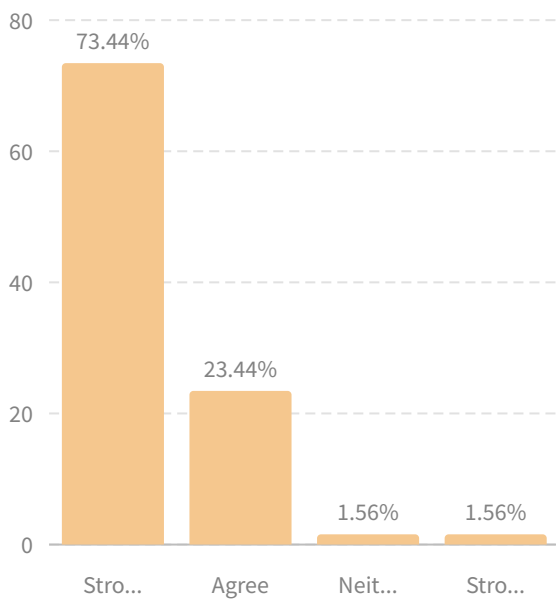
● The learnings from this time will positively impact my p

# I would recommend CLI to a friend or colleague. (Year to Date)

All Time ∨



● I would recommend CLI to a friend or colleague.

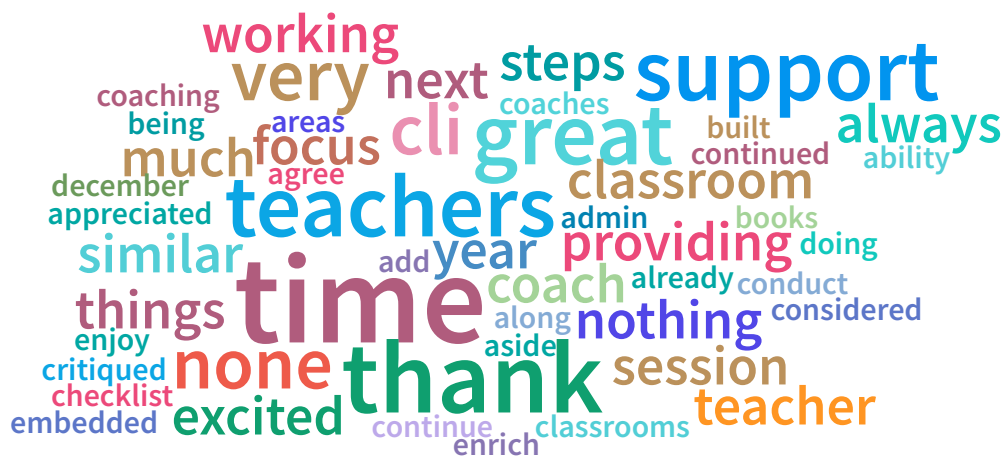# I would recommend CLI to a friend or colleague. (Last Week)

All Time ∨



75.81%

16.13%

6.45%

1.61%

80

60

40

20

0

Stro...  Agree  Neit...  Stro...

● I would recommend CLI to a friend or colleague.

# What was most beneficial from our time together?

All Time ⌄

# In what ways could we make our time together more purposeful for you and our work together?

# Additional Comments - Learning Walks

All Time ⌄

working very next steps support
coaching coaches built always
being areas cli great continued ability
much focus agree classroom
december teachers admin books
appreciated add providing doing
similar year already conduct
things time coach nothing considered
enjoy along aside
critiqued none thank session
checklist embedded excited teacher
continue classrooms
enrich

# Strategic Planning Session Survey

All Time ∨

# This Strategic Planning Session was a valuable use of time. (Year to Date)

● This Strategic Planning Session was a valuable use of ti

# This Strategic Planning Session was a valuable use of time. (Last Week)

- This Strategic Planning Session was a valuable use of ti
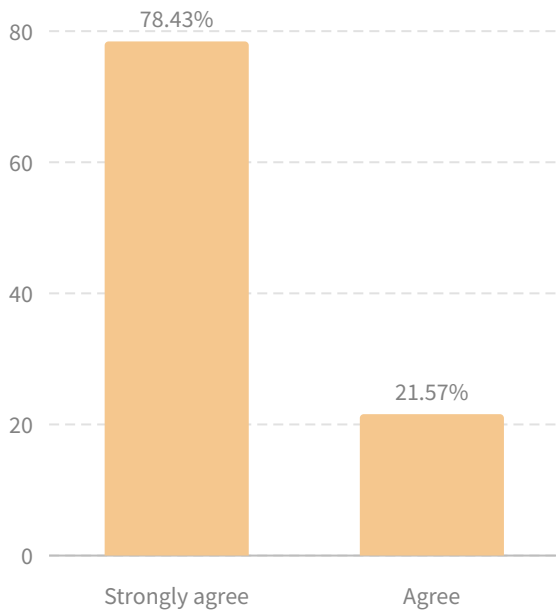
## This Strategic Planning Session was a valuable use of time. (Last Week)

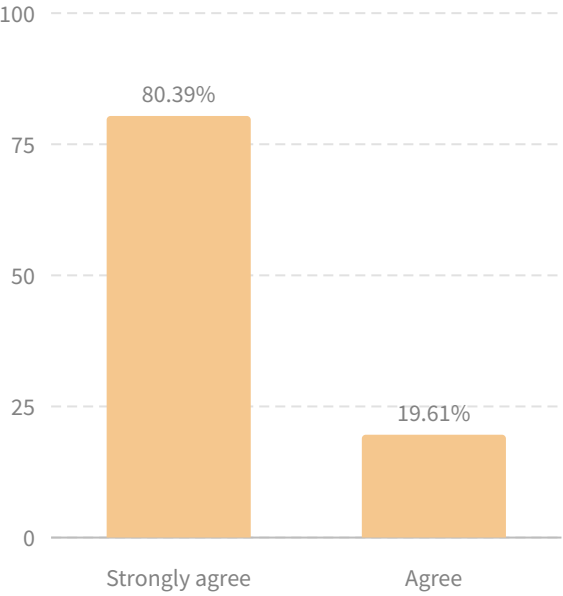# This time was well structured and facilitated. (Year to Date)
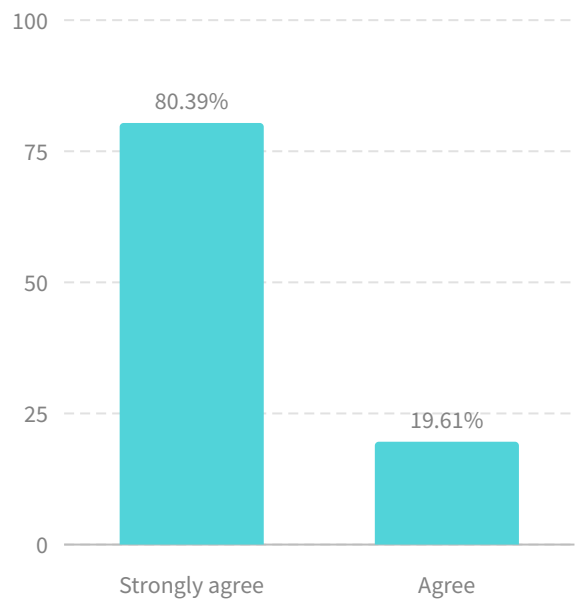
● This time was well structured and facilitated.

# This time was well structured and facilitated. (Last Week)

- This time was well structured and facilitated.

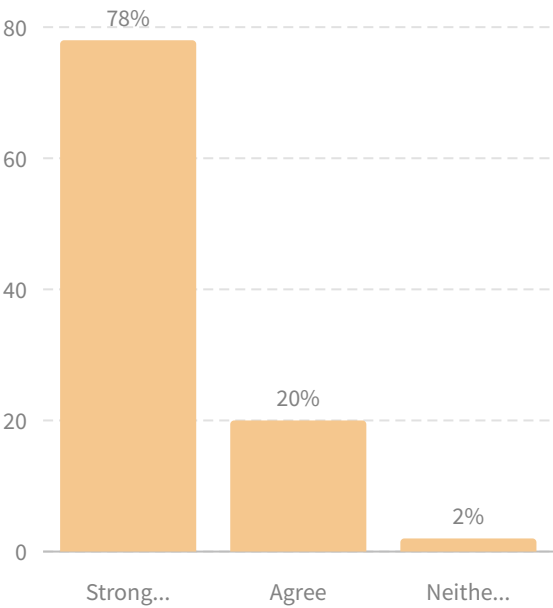# I would recommend CLI to a friend or colleague. (Year to Date)
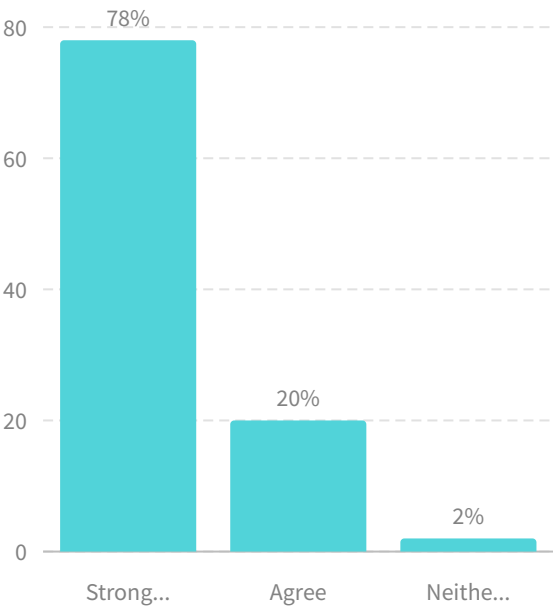
All Time ⌄



● I would recommend CLI to a friend or colleague.

# I would recommend CLI to a friend or colleague. (Year to Date)

All Time ⌄

# I would recommend CLI to a friend or colleague. (Last Week)

All Time ⌄



● I would recommend CLI to a friend or colleague.

I would recommend CLI to a friend or colleague. (Last Week)

All Time ⌄

# The learnings from this time will positively impact my practice to improve instruction. (Year to Da…

- ● The learnings from this time will positively impact my p
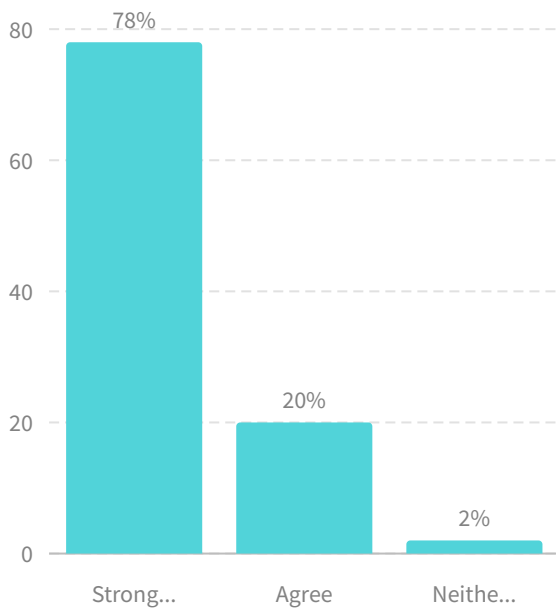
# The learnings from this time will positively impact my practice to improve instruction. (Last Week)
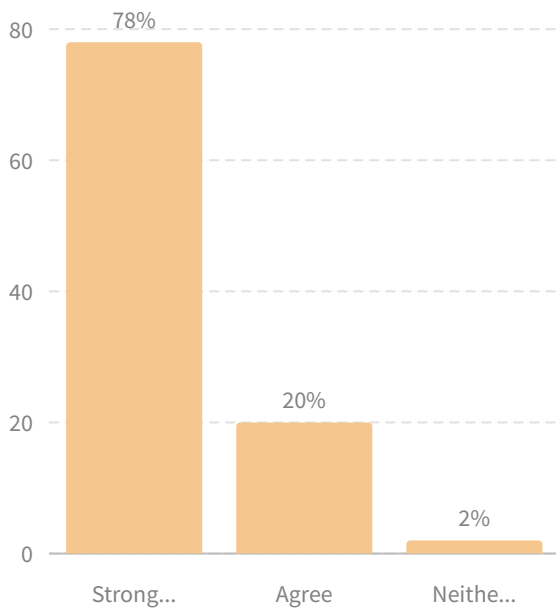
All Time ∨



● The learnings from this time will positively impact my p

The learnings from this time will positively impact my practice to improve instruction. (Last Week)
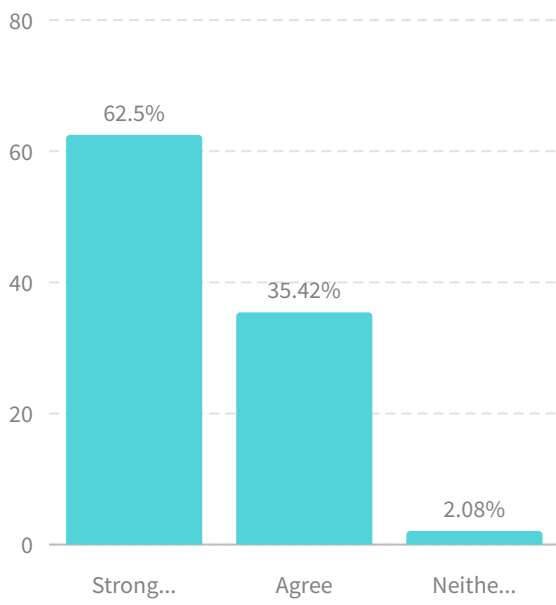
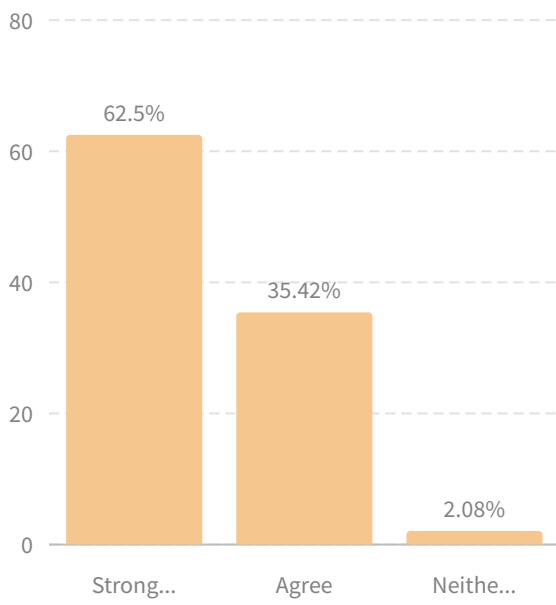# I feel prepared & confident to implement what I've learned to support my work. (Year to Date)

All Time ⌄



● I feel prepared and confident to implement what I've le

I feel prepared & confident to implement what I've learned to support my work. (Year to Date)

All Time ⌄

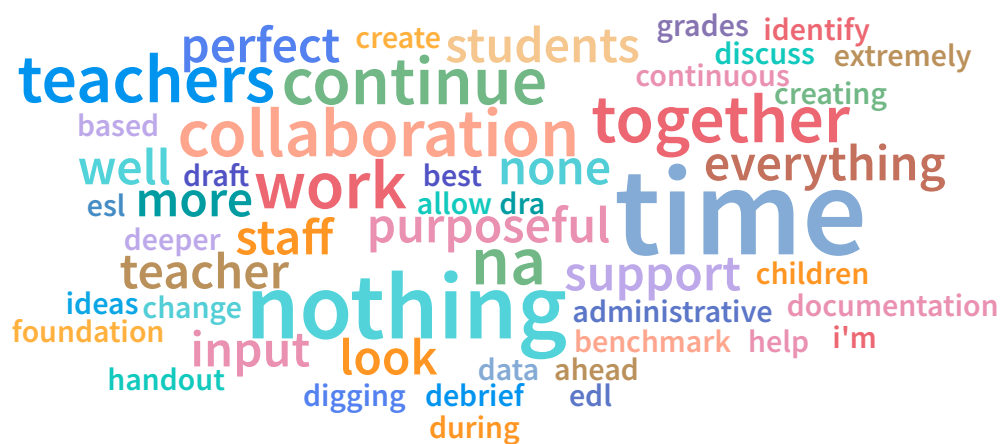# I feel prepared & confident to implement what I've learned to support my work. (Last Week)

All Time ⌄



Strong... 62.5%
Agree 35.42%
Neithe... 2.08%

● I feel prepared and confident to implement what I've le

**What was most beneficial from our time together?**

All Time ⌄

support specific school school's time collaboration behaviors change guided
focus ideas meeting clear goals rocks
plan through planning discussing
theory steps beneficial areas reading
needs established ability teachers talking
challenges brainstorming based big discussion
attainable up action cli reviewing coming
colleagues next creating coach
process goal understanding strategic together

# In what ways could we make our time together more purposeful for you and our work together?

teachers perfect create students grades identify
continue discuss extremely
based collaboration together continuous creating
well draft work none everything
esl more allow dra
deeper staff purposeful time
teacher na support children
ideas change administrative documentation
foundation input look benchmark help i'm
handout data ahead
digging debrief edl
during nothing

# Additional Comments - Strategic Planning Session

All Time ⌄

teachers partnership experience extremely one ran professionalism
grateful comments
beneficial excellent
action admin
very nothing planned
next instruction
pd bil
additional na far giving
support cli team
inform really goals consultants
execution appreciate meeting
well organized excited
coaches concise time
pleased department data
create long
group moment done plan

# Stepback Meeting Survey

All Time ∨

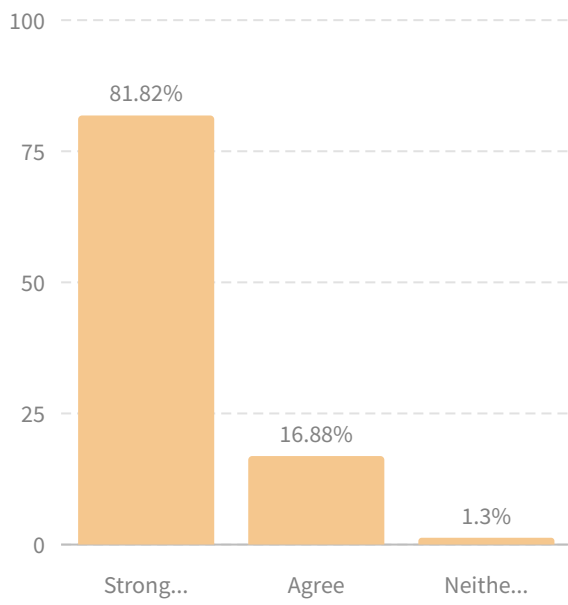# This time was well structured and facilitated. (Year to Date)

All Time ⌄



This time was well structured and facilitated.

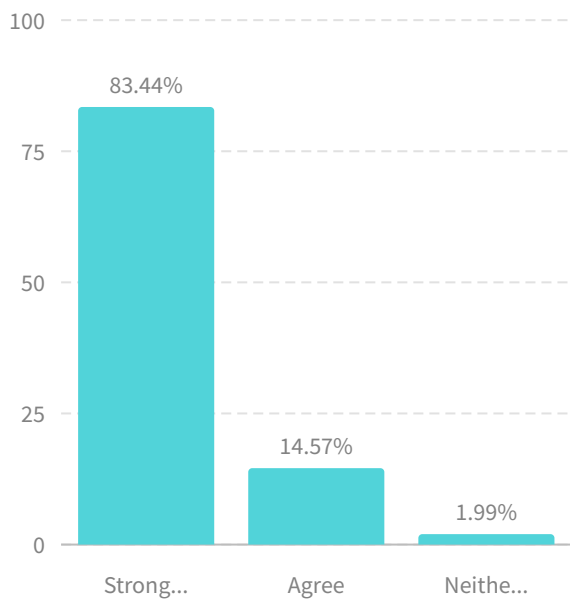# This time was well structured and facilitated. (Last Week)

All Time ⌄



● This time was well structured and facilitated.

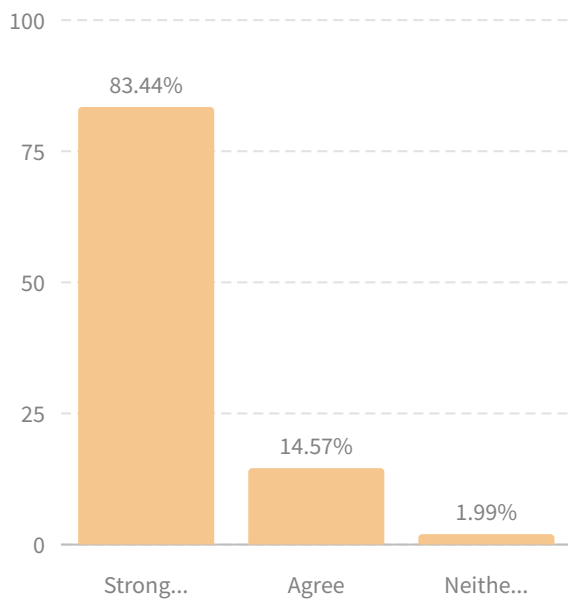# This Coaching Session was a valuable use of time. (Year to Date)

● This Coaching Session was a valuable use of time.

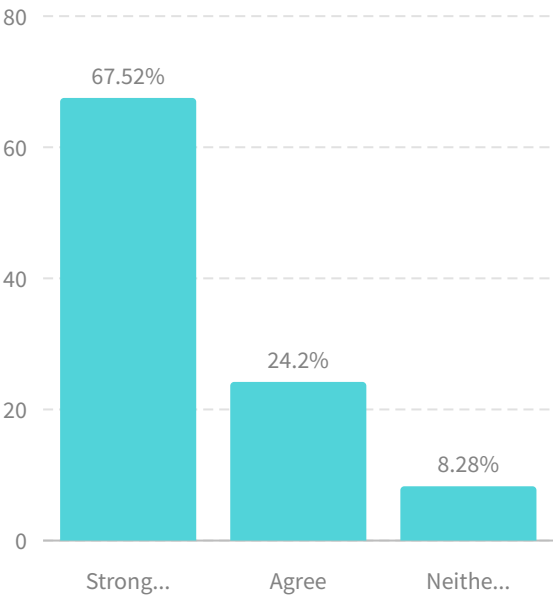# This Coaching Session was a valuable use of time. (Last Week)

● This Coaching Session was a valuable use of time.

# I would recommend CLI to a friend or colleague. (Year to Date)
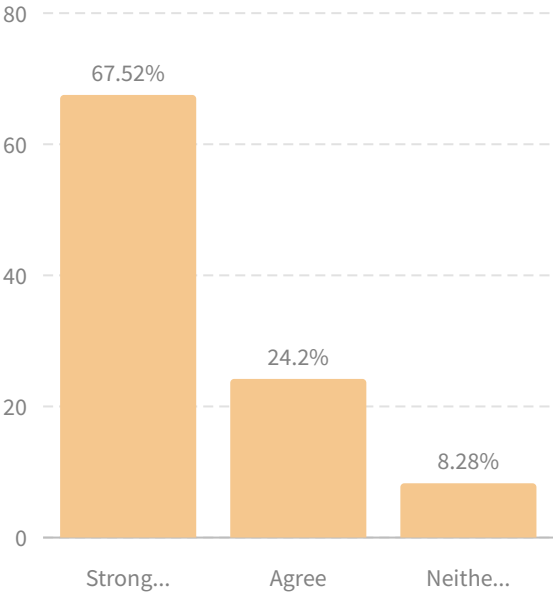
All Time ⌄



● I would recommend CLI to a friend or colleague.

# I would recommend CLI to a friend or colleague. (Last Week)
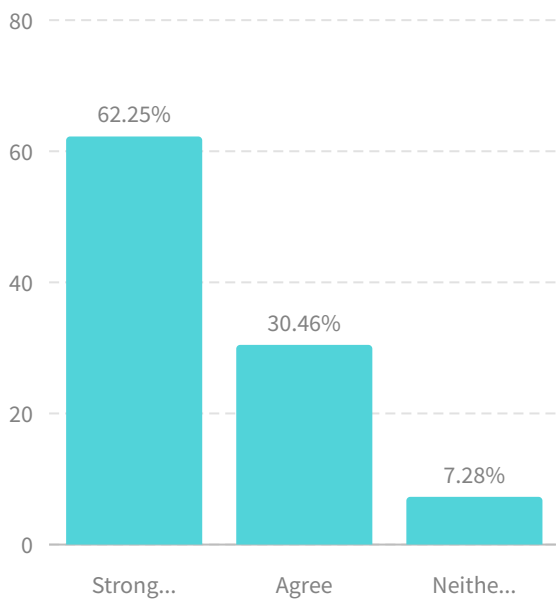
All Time ∨



- I would recommend CLI to a friend or colleague.

# I feel prepared and confident to implement what I've learned from this time to support my work. …

All Time ⌄

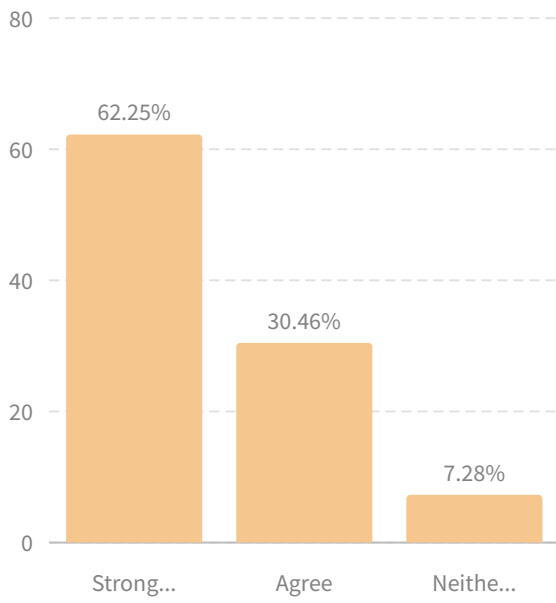

● I feel prepared and confident to implement what I've le

# I feel prepared and confident to implement what I've learned from this time to support my work. …

All Time ⌄



- I feel prepared and confident to implement what I've le

# The learnings from this time will positively impact my practice to improve instruction. (Year to Da…

● The learnings from this time will positively impact my p

## The learnings from this time will positively impact my practice to improve instruction. (Last Week)

All Time ⌄



74.68%

20.89%

4.43%

80

60

40

20

0

Strong...    Agree    Neithe...

● The learnings from this time will positively impact my p

## The learnings from this time will positively impact my practice to improve instruction. (Last Week)

All Time ⌄

## What was most beneficial from our time together?

feedback knowing lessons
getting small cli teaching
talking goals know doing creating
really plan learning time curriculum
more need el things writing
lesson next ms through reading
coaching work ideas make new
planning classroom
helpful right helped
strategies out sure group groups
together students positive
activities different
going explaining

**In what ways could we make our time together more purposeful for you and our work together?**

# Additional Comments - Coaching Session

All Time ⌄



benefits classroom anytime
need appreciate helpful
meeting besa august amazing
always con great time activity
came love forward na mrs being
classrooms binder none work feel
conscious benchmark carell needs
coaches coach very thank coming
cli better looking company
coaching i'm confidence appropriate
considerate far learning confident
more conscientious

132

# Tab 7 – Pricing / Cost Proposal

Teachers receiving dedicated literacy coaching not only witness significant enhancements in their literacy instruction but research indicates a notable positive impact on their approach to math instruction as well. The cross-disciplinary influence stems from the interconnected cognitive processes involved in both literacy and math skills development. As educators refine their pedagogical strategies in literacy through targeted coaching, they often find parallel benefits in their math instruction, fostering a more comprehensive and integrated approach to teaching. This underscores the interconnected nature of academic skills and highlights the transformative potential of literacy coaching on overall instructional practices.

CLI is enthusiastic about the prospect of beginning an impactful relationship with Henrico. We carefully crafted our cost proposal with the assumption that Henrico will be engaging a separate vendor for math coaching. T**he scope of work proposed represents a $110,550 investment in district-wide elementary literacy coaching using a 2-onsite days per week model (6 hourlong coaching sessions per onsite day) that can be flexibly allocated across the 46 elementary schools.** Our 4-day discovery allows us to build the deep understanding of the state of instruction district-wide so that we can be adaptive in our support structures and lean-in when vacancies arise. It is our understanding that the specific schools that our partnership would support are still being determined - so our Discovery period would allow for the systems-wide knowledge building required to provide on-demand capacity.

> **Total Cost: $110,550**
> Budget details in table below

Additional onsite days can be added to the scope at a rate of $1540 per onsite day (each onsite day consists of 6 hourlong coaching sessions). Virtual Coaching Sessions can be added to the scope at a rate of $315/hourlong session.

| | Key Deliverable | CLI Participants | District Participants | Tasks/Details | In-Person or Virtual | Hours for the activity PP |
|---|---|---|---|---|---|---|
| **Discovery Phase** | 4-Day Discovery | PIM and Coach | District Partners and School Leaders | CLI will meet with district partners to understand the district context and systems-level priorities. CLI and school leaders will conduct a series of short classroom visits used to build rapport, diagnose instruction, gather information, and establish a shared vision for instruction | In-Person | 1 |

| | Key Deliverable | CLI Participants | District Participants | Tasks/Details | In-Person or Virtual | Hours for the activity PP |
|---|---|---|---|---|---|---|
| **Strategic Planning** | Root Cause Analysis (up to 2 hours) | PIM and Coach | District and School Leaders | CLI will analyze all the information collected to uncover both the strengths and areas needing refinement in the learning community.<br><br>CLI will collaborate with school leaders to create a plan of action designed to bring about large-scale systematic change for the school.<br><br>Strategic planning will allow all stakeholders to align around a vision of equitable instruction and work together effectively towards the outlined goals | Either or | 2 |
| | Strategic Planning Meeting (up to 2 hours) | | | | | |
| **Support and Capacity Building** | Onsite Coaching Days - teachers (up to 6 hour long sessions per day, two onsite days per week, 30 weeks) | PIM | Teachers and School Leaders | 2 on-site days per week - 30 weeks | In-Person | 360 |

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| | Key Deliverable | CLI Participants | District Participants | Tasks/Details | In-Person or Virtual | Hours for the activity PP |
|---|---|---|---|---|---|---|
| Stepbacks | Stepback Meeting #1 (up to 3 hours) | PIM and Coach | District and School Leaders | CLI and school leaders will come together for a collaborative learning walk, conduct a data review, develop a problem of practice, and hold a stepback meeting. | Either or | 3 |
| | Data Analysis #1 (up to 2 hours) | | | CLI will support school-wide ongoing data analysis and instructional response to findings. | | 2 |
| | Stepback Meeting #2 (up to 3 hours) | | | CLI and school leaders will come together for a collaborative learning walk, conduct a data review, develop a problem of practice, and hold a stepback meeting. | | 3 |
| | Data Analysis #2 (up to 2 hours) | | School Leaders | CLI will support school-wide ongoing data analysis and instructional response to findings. | | 2 |

# Tab 8 – Exceptions

CLI requires no exceptions to the Scope of Services and General Terms and Conditions in this solicitation.

Appendix

# County of Henrico

**Addendum No. 1**

**Date:** January 23, 2024
**Request for Proposal:** 24-2626-1JL – Coaching Services for Elementary Schools Teachers
**Receipt Date/Time:** February 1, 2024 at 11:00 a.m.
**Subject:** Proposal Evaluation/Selection Process Revision and Questions & Answers

Ladies/Gentlemen,

Please make the following corrections, deletions and/or additions to the above referenced RFP:

1. Section VIII – Proposal Evaluation/Selection Process, Item B, add the following language at the end of paragraph:
   The County reserves the rights to award this contract to multiple Offerors.

2. Please see the attached "Questions and Answers".

All other specifications and General Contract Terms and Conditions shall remain the same.

Offerors must take due notice and be governed accordingly. Failure to acknowledge this addendum may result in your proposal being declared non-responsive.

Sincerely,

Jianchong Luo
Assistant Division Director
luo001@henrico.us

**ACKNOWLEDGEMENT:**

Signature: _____

Print Name: ___Heather Tranen_____

Company: ___Children's Literacy Initiative_____

Date: ___1/24/24_____

**RFP No. 24-2626-1JL**
**Coaching Services for Elementary**
**Schools Teachers**

**Questions & Answers**
**January 23, 2024**

1.  Question: Page 3, numbers 7 & 8, indicate that weekly updates to principals and daily submissions are to be made.  Is the idea to have a contracted individual/s on each site daily? Or does this mean on the day that coaching services are provided?

    Answer:  When coaching services are contracted, it will typically be for 3-4 days a week.

2.  Question: How many teachers do you estimate the contractor will provide coaching services to?

    Answer:  This will differ per school based on need and the amount of time a coach is assigned to the school.

3.  Question: In section B:2a of Scope of Services, it specifies that the contractor needs expertise in reading and math coaching. Is this a deal breaker if he or she does not, but has had success in b through f?

    Answer:  Coaching services will be contracted to support teachers in the areas of reading and/or math.

4.  Question: Will your district accept retired educators with expertise in reading/language arts and math content areas?

    Answer:  Yes.

5.  Question: Are you hoping to award this RFP to one vendor?  OR are you open to awarding to multiple vendors, one that would focus on literacy and another that would focus on math?

    Answer:  HCPS may consider multiple awards.

6.  Question: Can Vendors provide coaching for reading **or** math, or would the District prefer Vendors offer coaching for both reading **and** math?

    Answer:  We would prefer vendors who can offer coaching for both reading and math.

7.  Question: What curricula is the District currently using for reading and math instruction?

    Answer:  Advanced Benchmark will be used for reading beginning 2024.  There is not a specific curriculum used for math.

8.  Question:    Are the number of coaching days different per school according to need, and Title I allocations?

    Answer:    Yes

9.  Question:    Is there an average number of days per week that a coach would be in a school?

    Answer:    It depends on the budget for the individual school.

10. Question:    Will coaches be allowed to work with teachers on asynchronous days provided arrangements have been made with teachers the day before?

    Answer:    No

11. Question:    Can you please list the platforms that HCPS uses for professional development and teacher observation and how the HCPS uses each?

    Answer:    Typically, professional development is provided in person. There is not a specific platform for teacher observations for coaches to utilize since coaches are not evaluative. Informal learning walks occur for coaching conversations.

12. Question:    Can you confirm that coaches serve as peer instructional coaches, and elaborate on the expectations of the peer coaching model?

    Answer:    Coaching is not evaluative. Types of coaching activities may include planning with teachers, modeling best practices, coteaching, and conducting learning walks.

13. Question:    Can you please share what the maximum budget is for this RFP?

    Answer:    $200,000.

14. Question:    What are the expected dates that coaching will begin and end?

    Answer:    This will vary based on the needs of individual schools.

15. Question:    How many schools and teachers would need coaching?

    Answer:    This will vary depending on filled unfilled coaching vacancies.

16. Question:    Given the contract will start in March/April when schools have already hired their teachers, how many teachers would need coaching in each school? This helps us better understand how many Instructional Coaches would need to be deployed to each school. It would also be helpful to know how many coaches are needed per grade/ per school.

    Answer:    This will vary per school.  Likely, coaches will not be hired until the 2024-2025 school year unless there is a need at a school for the remainder of the year.

17. Question:   Is there 2023 ELA and Math data available for each school listed in the RFP? If so, can we please have access to it?

    Answer:   School Profiles may be accessed on the VDOE site.

**IRS** Department of the Treasury
Internal Revenue Service

Cincinnati Service Center
CINCINNATI   OH   45999-0038

In reply refer to:  0256559500
Apr. 11, 2019  LTR 4168C    0
23-2515768    000000 00
              00015096
           BODC: TE

CHILDRENS LITERACY INITIATIVE
990 SPRING GARDEN ST
PHILADELPHIA   PA   19123

006981

     Employer ID number:   23-2515768
      Form 990 required:   Yes

Dear Taxpayer:

We're responding to your request dated Apr. 04, 2019, about your
tax-exempt status.

We issued you a determination letter in June 1988, recognizing
you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)
(03).

We also show you're not a private foundation as defined under IRC
Section 509(a) because you're described in IRC Sections 509(a)(1) and
170(b)(1)(A)(vi).

Donors can deduct contributions they make to you as provided in IRC
Section 170. You're also qualified to receive tax deductible bequests,
legacies, devises, transfers, or gifts under IRC Sections 2055, 2106,
and 2522.

In the heading of this letter, we indicated whether you must file an
annual information return. If you're required to file a return, you
must file one of the following by the 15th day of the 5th month after
the end of your annual accounting period:

     - Form 990, Return of Organization Exempt From Income Tax
     - Form 990EZ, Short Form Return of Organization Exempt From Income
       Tax
     - Form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt
       Organizations Not Required to File Form 990 or Form 990-EZ
     - Form 990-PF, Return of Private Foundation or Section 4947(a)(1)
       Trust Treated as Private Foundation

According to IRC Section 6033(j), if you don't file a required annual
information return or notice for 3 consecutive years, we'll revoke
your tax-exempt status on the due date of the 3rd required return or
notice.

You can get IRS forms or publications you need from our website at
www.irs.gov/forms-pubs or by calling 800-TAX-FORM (800-829-3676).

If you have questions, call 877-829-5500 between 8 a.m. and 5 p.m.,

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CHILDRENS LITERACY INITIATIVE
990 SPRING GARDEN ST
PHILADELPHIA  PA  19123

local time, Monday through Friday (Alaska and Hawaii follow Pacific
time).

Thank you for your cooperation.

Sincerely yours,

Kim A. Billups, Operations Manager
Accounts Management Operations 1

# Pennsylvania Department of State

Bureau of Corporations and Charitable Organizations
PO Box 8722 | Harrisburg, PA 17105-8722
T:717-787-1057
dos.pa.gov/BusinessCharities

Regarding:           CHILDREN'S LITERACY INITIATIVE

Request Type:       Subsistence Certificate              Issuance Date: November 10, 2023

Request No.:         025295629                              File No.:            0001041276

Receipt No.:         000763659

Filing Type:          Domestic Nonprofit Corporation

Filing Subtype:     Nonprofit Corporation

Initial Filing Date: June 21, 1988

Status:                Active

TO ALL WHOM THESE PRESENTS SHALL COME, GREETING:

I DO HEREBY CERTIFY THAT

CHILDREN'S LITERACY INITIATIVE

is currently subsisting on the records of the Department of State as of the issuance date herein.

I DO FURTHER CERTIFY THAT this Subsistence Certificate shall not imply that all fees, taxes and penalties owed to the Commonwealth of Pennsylvania are paid.

IN TESTIMONY WHEREOF, I have hereunto set my hand and caused the seal of my office to be affixed, the day and year above written

Albert Schmidt
Secretary of the Commonwealth

Verify this certificate online at www.file.dos.pa.gov

# Request for Taxpayer
# Identification Number and Certification

▶ Go to *www.irs.gov/FormW9* for instructions and the latest information.

**Give Form to the requester. Do not send to the IRS.**

---

**1** Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

### Children's Literacy Initiative

**2** Business name/disregarded entity name, if different from above

**3** Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC

☐ C Corporation   ☐ S Corporation   ☐ Partnership   ☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☑ Other (see instructions) ▶   **501c3 Charitable Corporation**

**4** Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

*(Applies to accounts maintained outside the U.S.)*

**5** Address (number, street, and apt. or suite no.) See instructions.

### 990 Spring Garden Street, Suite 400

**6** City, state, and ZIP code

### Philadelphia, PA  19123

**7** List account number(s) here (optional)

Requester's name and address (optional)

*Print or type. See **Specific Instructions** on page 3.*

---

## Part I   Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

**Social security number**

☐☐☐ – ☐☐ – ☐☐☐☐

**or**

**Employer identification number**

2 3 – 2 5 1 5 7 6 8

---

## Part II   Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and

2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and

3. I am a U.S. citizen or other U.S. person (defined below); and

4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

**Sign Here**   Signature of U.S. person ▶ *Chapel Hotzchan*   Date ▶ *8/7/23*

---

# General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9*.

## Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

• Form 1099-INT (interest earned or paid)

• Form 1099-DIV (dividends, including those from stocks or mutual funds)

• Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)

• Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)

• Form 1099-S (proceeds from real estate transactions)

• Form 1099-K (merchant card and third party network transactions)

• Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)

• Form 1099-C (canceled debt)

• Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See* What is backup withholding, *later.*

# Inspiring a Lifelong Love of Literacy

![Children's Literacy Initiative]

Impact Report **2023**

# CONTENTS

**Literacy is the very foundation of all learning and the pathway to liberation for every human being.**

## OUR VISION

Children's Literacy Initiative seeks to dismantle structural racism by providing Black and Latinx children with the antiracist early literacy instruction, support, and advocacy needed to create equity in education.

We are working towards creating a more equitable education system, one that promotes early literacy, cultural competency, and equitable outcomes for all students, particularly Black and Latinx students who have long been disproportionately isolated from the resources to obtain the education they deserve. CLI believes that literacy is a vital pathway to create lasting social change and foster a just and equitable society.

Visit cli.org/our-new-mission to learn more about our sharpened mission.

## LETTER FROM CEO AND BOARD CHAIR



Dr. Diana Greene
CEO

Sandra Louk Lefleur
Board Chair

We are thrilled to share our Impact Report for fiscal year 2023. It is a true celebration of the past year and 35 years of CLI's work to empower children, educators, and communities through literacy. This report highlights the remarkable progress we've made this year in our mission to instill a lifelong love of reading in Black and Latinx children.

First and foremost, we want to express our heartfelt gratitude to our school partners, philanthropic investors, and all the volunteers who support us. Your contributions have made an incredible impact on the lives of the children we serve. With your help, we were able to reach and support over 16,468 children, 2,456 educators, and 781 classrooms.

This past year, CLI worked with teachers, school leaders, and district leaders to diagnose and strengthen early literacy instruction so that every child we served could experience mastery, success, and the freedom to shape their own future. We are equipping and empowering educators with skills that will endure, allowing CLI to touch the lives of every student they teach over the lifetime of their careers. This is an impact that is sustained long after CLI coaching and training are complete.

We believe that literacy is the foundation of lifelong learning and a powerful tool for understanding and questioning the world around us. If we don't educate our children, we risk our democracy, and we risk our ability to live up to our country's potential.

Literacy provides children with mirrors into themselves and windows into worlds of possibility. CLI is dedicated to providing literacy instruction that liberates children, inspires them to dream bigger, and empowers them to be their most authentic selves. We're firmly committed to creating a world where all children have access to equitable education, and where they're empowered to become transformative thinkers and world-changers.

Our report is a testament to the incredible power of culturally sustaining early literacy instruction, support, and advocacy. We are excited to enter this next phase of impact at this critical time in education. We hope that this report will inspire you to join us in building a lasting legacy of literacy and empowerment for generations to come.

Dr. Diana Greene
CEO

Sandra Louk LaFleur
Chair, Board of Directors





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## DRIVING IMPACT FOR CHANGE

Working with pre-kindergarten through fifth grade teachers, CLI is transforming literacy instruction and early childhood education so that children learn to read as a powerful act of identity, agency, and cultural joy.

We accomplish this by providing (virtually or in-person):

- One-on-one embedded teacher coaching
- Trainings on the best practices in early literacy instruction
- Leadership development to support sustainable change
- High-quality classroom books and materials

By helping educators learn high-impact instructional strategies and nurturing dynamic professional learning communities, CLI builds lasting capacity in teachers and principals that endures over time.

### By the Numbers

| 6 Regions | 8 Districts |
|---|---|
| 781 Classrooms | 124 Schools |
| 1,358 Educators | 1,098 Teachers |
| 249 Administrators | 16,464 Students |

We value the feedback from the teachers, principals, and educators we partner with. Educators must feel empowered and equipped with the necessary tools, resources, and knowledge to drive impactful change in classrooms, schools, and districts. CLI's project surveys provide insight into how we are building teacher and leader capacity.

### 2023 School Year Training Survey

**91%**
respondents agreed that CLI trainings will positively impact their planning and instruction.

**90%**
respondents agreed that CLI trainings will positively impact their students' literacy skills.

### 2023 School Year Teacher Survey

**84%**
responding teachers agreed that CLI coaching has had a positive impact on their professional development.

**89%**
responding teachers agreed that CLI coaches help promote a classroom that is inclusive, respectful, and affirming.

### 2023 End-of-Year Principal and Director Survey

**100%**
responding instructional leaders said that they were satisfied with CLI-facilitated leadership team meetings.

**100%**
responding instructional leaders said that they were satisfied with CLI-facilitated walkthroughs and Learning Walks.

CLI has helped my students' literacy learning this year by providing me with a wonderful CLI Coach. She has supported my students and me a lot this year. One student in particular, who was struggling to read and was on a beginning kindergarten level, has made great progress this year.

[She] provided many phonics/phonemic awareness activities for me to use with this student. She also modeled small group lessons and visits my class every Tuesday. She has established a rapport with my students, particularly the student who was struggling to read. She would take the time to bring her to the school library each week to choose books on her level.

Thanks to [her], this student is making progress, reading on a first/beginning second grade level, and writing responses to comprehension questions, which she wasn't able to do before.

**Teacher at CLI-supported school**

Contact a member of our Development Team to learn more about how you can have an impact on the next generation of leaders. Click here.

## A NEW LEADER, A RENEWED COMMITMENT

**We are proud to announce Dr. Diana L. Greene as the organization's next Chief Executive Officer (CEO). Founded in 1988 by former librarian Linda Katz, Children's Literacy Initiative is a nonprofit organization with more than 34 years of experience developing the instructional strengths of educators and leaders in pre-k – grade 6 schools in order to amplify and sustain powerful learning outcomes for children.**

Dr. Greene has served in public education for over 37 years, previously holding roles as a classroom teacher, school principal, and, most recently, serving as the Superintendent of Duval County Public Schools (DCPS), the 20th-largest school district in the nation.

A champion of children, families, and educators, Dr. Greene oversaw many transformative changes at DCPS. She increased and maintained the district's highest graduation rates over her five-year tenure, removing all schools from the state's turnaround list, while cutting the number of low-performing schools by more than half and leading the transition to remote learning during the COVID 19 pandemic. Dr. Greene successfully led the passage of two voter referendums, raising more than $2 billion over 15 years to replace and repair school buildings and increase teacher compensation.

With a deep commitment to social justice and racial healing, Dr. Greene also oversaw the renaming of six Duval County public schools that honored Confederate leaders. Dr. Diana Greene concluded her exceptional tenure as one of only a handful of Black women in the country serving as superintendents of large school districts. Recently, the Jacksonville Public Library unveiled the Dr. Diana Greene Children's Reading Place, a literacy center located on its main campus, in recognition of Dr. Greene's contributions as DCPS superintendent and her passion for literacy.

Source: TEDxJacksonville

"Following an extensive national search, we are thrilled to have Dr. Greene lead CLI into its next phase of impact," stated Sandra Louk LaFleur, Chair of the Board of Directors at Children's Literacy Initiative. "CLI advances work at the intersection of professional learning, literacy, and equity, all aimed at enhancing children's learning journeys and reading outcomes in collaboration with our school partners. Dr. Greene's exceptional leadership expertise at the school district level, her unwavering dedication to childhood literacy, acumen in resource development, and profound commitment to equity in education will propel CLI forward in fulfilling its mission at a most vital time in the field of education."

"As I embark on my next chapter in the journey to empower educators and children, joining CLI is a tremendous honor," said Dr. Diana L. Greene, CEO of Children's Literacy Initiative. "Now, more than ever, it is crucial to prioritize high-quality professional learning support for teachers and ensure that children receive the effective, joyful, and culturally responsive literacy instruction they deserve. I am thrilled to join an organization that places such immense importance on equity and evidence-based learning, and the Science of Reading, and eagerly anticipate collaborating with school and district partners nationwide to collectively build and sustain powerful learning communities."

Interviews with students were enlightening, offering direct insight into their experiences and perspectives on teaching and learning, as well as their hopes and dreams for their classroom experience. This student feedback was invaluable in assessing the effectiveness of current teaching methods and identifying areas for improvement.

Our comprehensive approach involving engagement with parents, teachers, classroom visits, and student interviews enabled us to gain a rich, multi-dimensional understanding of the educational landscape. This understanding has been instrumental in shaping our Foundations page, ensuring that it is not just theoretically sound but deeply rooted in the real-world experiences and aspirations of those involved in the educational journey. Our ongoing aim is to continually evolve and adapt our approach to remain at the forefront of educational excellence and relevance.

Engaging with parents and caregivers was a central aspect of our approach. We recognized their crucial role in shaping a child's learning environment and learning, their insights on the educational process. Understanding their perspectives on developmental needs and their aspirations for their children's literacy experiences provided us with invaluable viewpoints often overlooked in traditional educational frameworks.

Another key component was our in-depth engagement with teachers. As primary educators, their insights are crucial. We explored their experiences in teaching and learning within their specific school environments, including both their successes and challenges. These discussions were vital in identifying the support teachers need to provide excellent literacy instruction. By understanding their challenges, we could tailor our framework to be more effective and supportive.

Our efforts to gain a holistic understanding led us to visit classrooms across all our markets. These visits allowed us to observe the current state of teaching and learning, focusing on understanding the developmental needs of students and the necessity for Diversity, Equity, and Inclusion on school campuses. These experiences provided us with a comprehensive view of the educational landscape and the diverse needs across different regions and demographics.

---

**Erica Holmes-Ware**
Chief Program Officer

# EVOLVING AND ADAPTING: LEARNING TOUR FOUNDATIONS

Last year, we reached a pivotal point in our organizational journey, embarking on a project to develop a crucial component of our educational framework: the "Foundations" page. This initiative was not merely about keeping pace with the latest findings in children's literacy research. It was an expansive effort to comprehensively understand the diverse facets of teaching and learning, integrating various critical perspectives. Our goal was to create a tool to assist teachers, coaches, and school leaders in assessing the current state of early literacy instruction and instructional practices, aligning them with their vision for culturally relevant and sustaining pedagogy, affirming identities, and antiracist literacy instruction.

Our journey took us to various locations, including Broward, Boston, Chicago, Philadelphia, and Northern New Jersey (NNJ). These visits were integral to our mission of empowering stakeholders to make data-driven decisions to foster the growth and development of teachers. Our focus was on improving instructional practices and creating classroom cultures and experiences that affirm and uplift students. We aimed to continue developing a tool centered on teacher coaching and development,

**I loved the support and resources shared ... through CLI. I loved [the] many lessons and planning I was able to do this year. I have to say that the book tasting idea that my coach introduced me to was one of my favorites. She was supportive and flexible with my crazy schedule. I truly appreciate her candor and sweet disposition. She made this year so pleasant.**

Teacher
CLI-supported school

Mary List
*Senior Executive Director*

## NORTH LAWNDALE READS INITIATIVE

In our final year supporting the North Lawndale Reads Initiative, CLI has exceeded all expectations, showcasing remarkable progress and achievements. The data speaks volumes, highlighting the undeniable positive impact of our interventions and instructional strategies on children's reading growth and performance. This resounding success firmly affirms the effectiveness of our implemented approaches.

A standout achievement is the substantial overall growth in children's reading levels. Among consistently present students at both Sumner and Kellman, the average increase surpassed an impressive 4 reading levels, surpassing our initial goals.

Moreover, the data emphatically underscores our success in meeting grade-level expectations. The notable rise in the percentage of children scoring within their grade band at the end of the year, compared to the beginning, is a testament to the efficacy of our interventions and instructional support. This positive shift is evident across all subgroups, demonstrating our ability to not only meet but exceed grade-level expectations.

CLI's 4-day model for supplemental literacy instruction, known for its rigor, has made a discernible positive impact. The substantial growth observed in children this year reinforces the effectiveness of CLI's culturally-sustaining approach to supplemental literacy instruction.

Specifically, Kellman saw an impressive 53% of second-grade children and 47% of third-grade children meeting or surpassing grade-level expectations. In contrast, Sumner had 14% of second-grade children achieving this milestone. These figures underscore the effectiveness of our interventions and instructional support in propelling children toward grade-level success.

### In Their Own Words

This is what a third grader had to say about their reading growth this year:

My scores went up in reading, and I can read longer books now. I've been working hard and never give up. Spelling has gotten better because you taught me how to break works apart and sound words out. I never knew how to spell long words. Now I can. I got the most improved reading award in my class this year and that made me proud of my progress in reading and writing. I feel more comfortable reading and writing in class because teachers can help me a lot more than parents.

My mom is always at work, so nobody can help me. I learned how to make a movie in my head when I am reading longer books and that way, I can remember what I read. I also tap words out that I don't know when I read or write. I want to be an all "A" child next year. I need to keep working on my reading and writing and come to school every day.

Interested in learning more? Connect with a CLI team member today to learn more about our work and how we are transforming classrooms for equity.

This is the power of transformational coaching. It is not the role of CLI to impose thinking or facilitate one behavior change. Our support helps clients dive deep and really consider who they want to be and the kind of school they want to lead. From this, a clear vision and set of values helps drive the rest of the difficult decisions coming next. If we clearly see our values around anti-racist, inclusive, and affirming experiences for children, then we equip educators and leaders to take the actions that live those values again and again.



While all centers grapple with these questions as they navigate curriculum leadership in holiday months, one center has transformed its thinking around inclusionary and culturally affirming curriculum. With the support of the CLI coaching team, the leaders honed their vision for curriculum, deciding that "it is not in the best interest of ALL of our students to include religious celebrations in our daily curriculum." This decision was not taken lightly. Over many staff meetings, surveys, and months of planning, the leaders worked to hear and align with their staff on the decision. They spoke with families and brainstormed other ways to gather, including outside visitors, and still create open spaces for all children to share about special traditions happening for them throughout the year.

This past Halloween was the first holiday where the center had to navigate its new curriculum decisions. Change management is complicated and imperfect. The team at the center communicated their vision, spent hours thinking about and responding to families' questions and concerns, and held open office hours to discuss the shift. The thing they kept returning to in discussion after discussion was the question: Who are we and what do we value?

Lindsay Mangold
Partnership and
Implementation Manager

## SUPPORTING EARLY CHILDHOOD IN MASSACHUSETTS

We have many goals for the impact of our early childhood work in Massachusetts. We want to equip directors with the skills of a coach so they can lead and develop their staff. We want to improve data systems at centers to support program quality. We directly support educators so they develop the skills to run affirming, engaging, and inspiring days for children. A big part of these goals is implementing a meaningful, connected curriculum.

When we talk about curriculum in early childhood, we always run into the question of what to do around seasons and holidays. These are the hallmarks of early childhood curriculum as it has been implemented for generations. Some families look forward to sending their children in costume on Halloween, receiving handmade Christmas gifts, and preparing valentines to be sent to school.

Challenging seasons and holidays can challenge the very core of many leaders' and educators' reasons for entering early childhood careers in the first place. Even so, as an anti-racist organization, the questions remain. How do curricular and community activities based on seasons and holidays include, affirm, and celebrate all families? Who gets left out?

## BUILDING BRIDGES: FOUNDATIONAL SKILLS FOR EARLY LEARNERS



Nicole Unegbu
Partnership &
Implementation Manager



No one can deny the impact that COVID has had on our society. One of the most salient areas of impact is the literacy development of young learners. As COVID necessitated an emergency shift to distance learning, educators across the country embarked on a steep learning curve with new instructional technologies and methodologies overnight. Simultaneously, social inequalities increased barriers to effective instruction—such as access to internet or technology devices for many Black and Brown students during this time.

As a response to the continued impact of the pandemic, in the fall of 2022, literacy coaches in Portfolio 1 began developing coaching plans with teachers and school leaders to address foundational skills knowledge with the earliest learners. Teachers and leaders alike expressed concern over how to meet the diverse needs of early literacy development in large and small group settings. Assessments and observations demonstrated foundational skills needs, especially for those whose first school experiences coincided with the COVID-19 pandemic.

At one partner school, Morrison Elementary, teachers received one-on-one and small group coaching around curricula new to the school to specifically address students' phonological awareness and phonics development. Under the facilitation of the CLI literacy coach, Morrison teachers also collaborated in weekly Professional Learning Committee (PLC) meetings to develop a new framework for foundational skills-focused small group instruction, using materials designed to bridge the phonics and shared reading curricula in the school.

The impact of the CLI-Morrison collaboration to redress foundational skills had a tremendous impact on students, nearly tripling the number of second-grade students scoring "At or Above Grade-Level" on the foundational skills benchmark tests. One teacher marveled, "Coaching helped me to use data to drive instruction by analyzing my students' performances, which guided my instruction on who needed more support, reinforcement, or who would benefit from having enrichment lessons."





"It gave me true feedback on how many of my students were understanding the lesson." Another teacher exclaimed, "[CLI coaching] helped us create a smart structure for small group instruction with predictable routines. [It] made planning easy and learning automatic!"

At another partner school, Frederick Douglass Mastery Charter School, the CLI literacy coach supported the K-2 team as they shifted small-group instruction to include a targeted opportunity to practice systematic phonics with apprentice teachers and address areas of phonological awareness development with the classroom lead teacher.

In one kindergarten classroom receiving coaching, the teachers saw a 25% increase in the number of children meeting or exceeding grade-level assessments in foundational skills. One teacher reflected on her coaching experience, "Coaching sessions were telling me everything I needed to know as a new teacher. Everything is for immediate impact! I would see it work in a model and then immediately try it." Another teacher expressed, "Figuring out how to teach different levels of kids and planning for them using data was very helpful."

**For children, learning to read has meaning far beyond the simple building of skills. Reading is an act of identity building and affirmation, intellectualism, a way to understand and question the world around them, and most importantly, joy.**



## LIFELONG LOVE OF LITERACY: BRYCE SIMMONS

As we celebrate our 35th anniversary, it presents us with the opportunity to take a look back at the impact that Children's Literacy Initiative has had on the lives of teachers and children, and to follow up with the friends we have made along the way.

In 1999, "Room 107, A Special Place" was filmed at Kearny School in Philadelphia. In that video we filmed our very first model classroom teacher, Ellen Ginsberg, and spoke with her about how working with CLI has changed the lives of her and her students.

In 2009 we caught up with one of the students from that classroom, Bryce Simmons, to see what he remembered about his kindergarten experience. And now, in 2023, we brought Bryce back to talk about life, being a dad, and what role his early learnings have had on his life.

Only this time we brought a surprise...



Bryce

f a CLI Model Kindergarten Classroom
Initiative - YouTube



Watch the full story on cli.org/impact-report-2023.

Vist cli.org/impact-report-2023 to see Bryce and Ellen's inspiring journey.

# EMPOWERING THROUGH LITERATURE

## Read4Change's Impact on Childhood Literacy in Philadelphia

Satya Nelms
Foundation Relations
Grants Manager

Stephanie Tallman
Manager of Development
and Stewardship

In the heart of Philadelphia, a group of seniors from MaST Community Charter School has embarked on a mission to bridge the opportunity gap and promote early childhood literacy through their non-profit organization, Read4Change. Established by Judith, Sana, and Siobhan, this student-run initiative has its roots in a shared passion for literature and a commitment to addressing the disparities in educational opportunities.

Read4Change is dedicated to advancing literacy in the Philadelphia community by generating funds for literary organizations in any creative and engaging fashion possible to aid the community in obtaining books and other fundamental resources for children in need and ultimately combat the exorbitant illiteracy rates in the city of Philadelphia.

Judith, a volunteer at her local library, where she reads stories to young children, observed the stark contrast in resources available to different children in Philadelphia. Her inspiration stemmed from witnessing first-hand the impact of economic disparities in educational opportunities.

Sana is the daughter of Iraqi refugee parents. They fled their homeland in the late 90's due to persecution for their religious minority identity and their rebellion against the oppressive regime. Sana sought to use literature as a medium to inspire minorities and challenge societal norms, showing that literature cannot be censored and that it should not merely be limited in access to those who have the material means to buy it. Sana believes that every story and piece of literature deserves to be shared and experienced by everyone. It should not be a luxury or a privilege. It is a universal human right.
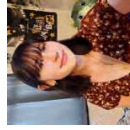
This experience not only motivated Sana to collaborate with her friend Menah on an in-the-works project centered on the teachings of suppressed Middle Eastern narratives but also propelled her to join forces with Judith and Siobhan in establishing Read4Change.

Siobhan's inspiration connects to her desire for children to be able to have the experience of developing a passion for narratives and storylines, as well as expanding their education in a fun and engaging way. She loves to read because it allows her to use her imagination and she finds relaxation within the hobby. Siobhan wholeheartedly believes children would be able to relate to her love of reading if provided greater access to literacy. When children have access to books that align with their interests, it allows them to build a positive sentiment for literature, inspiring them to pursue their dreams and aspirations.

Together, they hope to bridge partnerships and create further alliances with organizations such as Reading Recycled, the National Book Foundation, and the Braille Institute, to increase awareness. In addition, Read4Change intends to get its gradually growing teenage/young adult audience on both their Instagram and within their school's student body to participate in their projects to best maximize impact and contribute to awareness of the global illiteracy epidemic.

Read4Change's impactful initiatives include the Read4Change Fundraiser, a project encouraging high school students to collectively read 100 books in four months. The initiative took place this fall and was conducted through an Instagram page, garnering significant success, engaging over 45 students. They are currently working with multiple Philadelphia high schools to organize a book donation project coming soon!

Launching a non-profit as high school students presented challenges, especially in gaining support and partnerships. Rejections and unanswered messages were common, but through perseverance, Read4Change connected with the Children's Literacy Initiative and its vision of literacy to liberation.

Although Read4Change is in its early stages, the organization has already seen success through its interactive fundraiser. Collaborating with the Children's Literacy Initiative, raised $1000, which is the equivalent to an estimated 60-66 high-quality, identity-affirming books for children in classrooms to check out and read at home. With potential campaigns and collaborations on the horizon, Read4Change aims to amplify its impact on childhood literacy rates.

Upon graduating from high school, the founders have diverse career aspirations. Judith envisions becoming a college professor and spreading the joy of learning to the next generation. Sana is working toward her dream to be a traveling physician that specifically treats refugees in asylum camps, and Siobhan plans to pursue a career in graphic design. Despite their individual paths, they remain united in their commitment to continue Read4Change and fight illiteracy in Philadelphia.

Read4Change stands as a testament to the transformative power of literature and the determination of young minds to make a difference in their community. Through their passion, initiative, and collaborations, these students are paving the way for a future where every child can unlock their full potential through the joy of reading.

Judith      Sana      Siobhan

We are preparing for up to 200 participants at the local event, locking arms with another 200 virtual champions. This is not just a run/walk; it is a race toward a brighter future for Black and Latinx children, driven by the collective power of literacy advocates like you.

Let us transform literacy from a distant dream into a living, breathing reality for every child. Lace up those sneakers, rally your friends and network, and be part of a celebration of literacy, unity, and the boundless potential within each child.

If you are looking to elevate your brand and participation, we have sponsorship opportunities available. As a sponsor, you will have the opportunity to show your commitment to education, community, and positive change. Choose from a range of sponsorship packages designed to maximize your visibility, from logo placements on event materials, to prime recognition during the race experience. Be a driving force in the movement towards a brighter future for Black and Latinx children, while gaining valuable exposure to our vast community.

## Contact Us for Sponsorship

Do not miss the chance to be part of this inaugural event—seize a sponsorship opportunity for Run 4 Reading and be a catalyst for change! For more information, contact Stephanie Tallman, at stallman@cli.org.



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Stephanie Tallman
Manager of Development
and Stewardship

**The Children's Literacy Initiative (CLI) invites you to join us for Run 4 Reading. This event goes beyond the ordinary 5K walk/run; it's a thoughtful celebration of literacy, empowerment, and community, where every step resonates with the power of positive change.**

CLI, a trailblazer in the world of literacy for 35 years, is launching the Run 4 Reading annual fundraising event. Mark your calendars: Saturday, April 13, 2024, a day when we will bring the excitement to life both in person and virtually. Feel the adrenaline surge as the live edition unfolds at the iconic FDR Park in Philadelphia, PA.

Run 4 Reading replaces Raise a Glass for Reading, which was CLI's signature fundraising event between 2017 and 2022. It is not just a shift; it is a transformation, a bold move to dive even deeper into the vibrant tapestry of our partner communities. CLI's community consists of over 57,000 passionate supporters spanning our email list and social media. Get ready as we connect with an even larger group of literacy enthusiasts and champions through this new event.

## RUN FOR READING

Unleashing the Power of Literacy with CLI's Inaugural 5K Run



Watch and save the date for a special event. R4R!

## DONOR SPOTLIGHT

### Dov and Jeanne Haselkorn

Dov and Jeanne Haselkorn met in college studying finance and upon graduation both pursued careers in their field of study. Yet, there was another interest that they also shared—that of literacy and a love of reading.

Once married, Dov and Jeanne decided they wanted to contribute to meaningful nonprofits and specifically sought out organizations and causes that were important to them. In 2010, they discovered CLI and were drawn to the organization's work in Philadelphia and nationally to ensure that children in underserved communities receive the high-quality instruction and books needed to prepare them to read on grade level.

"We did our due diligence on the charity ranking websites and one of the few we chose was Children's Literacy Initiative."

Dov and Jeanne have since started their family and love to watch their own children, ages 3 to 14, in whom they have instilled their love for reading, devour books. The family has sustained their support for CLI, committed to having as many children as possible have access to the gift of reading.

"CLI has impressed us at every turn—from the growth into new markets and the quick move to coaching teachers on effective Zoom strategies when the pandemic started; to the shift toward explicitly addressing the literacy needs of Black and Latinx children in an effort to combat what is broken in our education system," Dov and Jeanne share as they reflected on what has inspired them to renew their support year after year.

"Over the past 13 years, all of CLI's leadership and personnel have been amazing, and we've no doubt that the current team will propel the mission forward to even higher heights."

## DONOR SPOTLIGHT



THE
HAMILTON FAMILY
CHARITABLE TRUST

### Hamilton Family Charitable Trust: Literacy Champions for Over Two Decades

Children's Literacy Initiative would like to offer our sincere gratitude and appreciation to the Hamilton Family Charitable Trust for over 23 years of giving. The Trust has seen CLI evolve and adapt to meet the needs of the schools, educators, and children we serve. They have supported our work as we have grown and refined our services to develop and establish literacy practices that meet the needs of all children.

The Hamilton Family Charitable Trust is comprised of two generations of the Hamilton family and has a long history of philanthropy in the Philadelphia region. They invest in experiences that empower students to achieve academically and become meaningful contributors to their local and global communities. The family has demonstrated a commitment to improving educational opportunities for children and youth, which is evident in their legacy of giving.





Literacy is practice of justice and joy, and we are committed to supporting children and teachers.

# BOARD OF DIRECTORS
## 2022–2023

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|---|---|---|---|
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| Victoria Raivitch | Treasurer | Principal | CliftonLarsonAllen LLP |
| Mary Klein | Secretary | Retired Educator | |
| Richard Berkman | | Of Counsel | Dechert LLP |
| Henri Crockett | | Co-Founder & President | Crockett Foundation |
| John Bonow | | Managing Director & CEO | Public Financial Management |
| Nelson Flores | | Associate Professor, Educational Linguistics Division, Graduate School of Education | University of Pennsylvania |
| Frank Gettridge | | Executive Director | National Public Education Support Fund |
| Steve Piltch | | Senior Fellow Director, School Leadership Program | Graduate School of Education University of Pennsylvania |
| Lori Taylor | | Senior Counsel | Foley & Lardner LLP |
| Jacqueline Woolley | | Attorney & Counselor at Law | The Ezold Law Firm, P.C. |
| Reina Prowler | | COO | Children's Literacy Initiative |

# ADVISORY BOARDS

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Chicago Director, My Very Own Library

**AJ DeLeón**
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**Kevin Johnson – Vice-Chair**
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**Heather Gray**
Vice President - Treasury Solutions, Truist

**Primrose Humphries**
Licensed Mental Health Counselor, Culmer Counseling Services, LLC.

# Inspiring a Lifelong Love of Literacy

## Impact Report 2023

**Children's Literacy Initiative**

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Philadelphia, PA 19123

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ig @cliupdates

fb company/childrens-literacy-initiative

in children'sliteracyinitiative

Children's **Literacy** Initiative

Charity Navigator
★★★★
FOUR-STAR

GUIDESTAR Exchange
GOLD
PARTICIPANT

# Additional Impact and Important Metrics

CLI's work has been validated by prestigious independent organizations and has garnered national attention for its ability to raise student literacy scores while building schools' internal capacities for teacher professional development.

**Partners strongly value our work.** 80% of leaders surveyed agreed that CLI's support, coaching, and development supported them in improving their coaching practices.

**CLI builds leaders' content knowledge and instructional leadership.** 100% of leaders reported that their content knowledge in literacy instruction and instructional leadership had improved over the course of the year as a result of the support from CLI.

**Leader capacity increases as a result of our partnership.** 100% of leaders agreed that their knowledge of effective coaching and facilitating adult learning increased over the course of the school year as a result of working with CLI.

**Children accelerated four reading levels over the course of a year** as measured by Fountas and Pinnell Benchmark Assessments as a result of CLI's literacy programming.

**The American Institutes for Research report on a randomized control trial evaluation of CLI's i3 Validation project found statistically significant results** for our impact on teacher practice and student learning. Our approach and results are now part of the What Works Clearinghouse.

**Independent Study Proves Children's Literacy Initiative's Methodology Provides Significant Results**

Results from a three-year, randomized control-group study of CLI's i3 project in four cities by American Institutes for Research, showed that:

- Kindergarten and second grade students in CLI schools scored significantly higher on standardized early reading tests than students whose teachers were not exposed to CLI.
- CLI had a significant positive impact on the quality of teachers' literacy instruction in both kindergarten and first grade classrooms.

**OMG Center for Collaborative Learning**

A 2009 control-group study by OMG Center for Collaborative Learning, funded by the William Penn Foundation, showed that kindergartners and first graders in Philadelphia schools with CLI classrooms consistently outperformed peers on district literacy skill assessments.

**University of Pennsylvania's Center for High-Impact Philanthropy re-affirmed CLI as an "exemplar agent"** improving early literacy education and making a long-term impact year after year.

**Schools served by CLI's i3 Validation project in Philadelphia and Chicago are still outperforming** the control schools from that study on third grade standardized assessments.

NJ DOE RAPID

NJDOE Regular Sessions Report and Summary

7 trainings around Comprehension, Vocabulary, Fluency, Phonics, Phonemic Awareness, Phonological Awareness, and Orthography, addressing various content areas that are found in the Science of Reading

- 115 responses to surveys
- 98% of respondents agreed that the trainings were a valuable use of time
- 99% of respondents agreed that the trainings were well organized and engaging
- 100% of respondents agreed the objectives for the trainings had been met upon completion
- 100% of respondents agreed that the sessions were facilitated well (e.g., the facilitator(s) were knowledgeable, engaging, authentic, responsive, respectful, etc.)
- 96% of respondents agreed that they were leaving the trainings with a stronger understanding of the topics covered
- 98% of respondents agreed that they could see how their students would benefit from the learnings in the trainings
- 97% of respondents agreed that the learnings from the trainings were readily applicable to their role and practice
- 94% of respondents agree that they feel prepared to implement what they learned in the trainings in their role and practice

## Testimonials from Partners

CLI values feedback from our partners in order to ensure project goals are met with intended impact.

Throughout the year, we offer direct and indirect opportunities for district leaders, teachers, and members of school leadership teams to share critical feedback to support our continuous improvement.

We are proud to share some of the feedback that we believe speaks to our purpose. The quotations below are from school-based partners across the country.

CLI and I both have high expectations for our kids. We, also, strive to give our children a high quality literacy experience by providing them with great literary texts and activities that promote a love for reading. (Chicago, Teacher)

My [CLI] coach has taught me so much and opened my eyes to what an effective, engaged, and inclusive classroom looks like. [They have] impacted my career more than words can say. There were times that I thought teaching may not be for me but [they have] helped me to realize the love I have for this profession. I am forever grateful for [my coach]. [They're] a friend, a teacher, a listening ear, and a cheerleader. (Houston, Teacher)

I would say the CLI program in its entirety has contributed to my students' growth this year. I feel my students have grown amazingly this year and they are eager to learn because of CLI. The CLI's schedule breakdown keeps the students just as busy as the teacher. I feel that CLI is very effective for both students' and teachers' growth. CLI has helped me create an even better learning environment. A learning environment that has few management problems, the joy of learning, and the feeling that my classroom is a community. CLI has helped me become a stronger literacy teacher for all of my students.

My meetings with my CLI coach helped me prepare for differentiated instruction and how to introduce new concepts/build on them. (Broward, Teacher)

I learned and grew so much as a reading teacher.  I have been teaching 20 years and did not think that I could grow as much as I did.  I really feel that I am at my most effective right now because of CLI. (Broward, Teacher)

I loved every minute of the time with CLI.  I feel it strengthened my knowledge base and bank of literacy methods and strategies.  It definitely brought back the joy and love of teaching literacy. (Denver, Teacher)

CLI has had a positive impact on the overall culture within my building. Teachers are excited about implementing everything that they have learned from participating in the CLI program. The children are excited about reading the new books, they are also excited about learning new things and developing their reading, writing, and language skills. (Pre-K Director, Philadelphia)

"I implemented Guided Reading and Reading Workshop. I have seen a love for reading grow and students' vocabulary, writing, decoding, and comprehension improve greatly." (Willingboro, NJ)

"Ongoing CLI coaching in the area of guided reading was instrumental in moving my higher-level readers." (Newark, NJ)

"Fun lessons using Read Alouds. My CLI coach and I came up with several lessons geared towards particular topics (comprehension/phonics) that my students have shown growth with. We worked on a lot of reading workshop and reading strategies that we use on a daily basis." (Elizabeth, NJ)

## Additional References and Letters of Recommendation

Paula S. Renfro | Chief Academic Officer, Duval County Public Schools
904-348-5144, renfrop@duvalschools.org

Olga Hugelmeyer | Superintendent of Schools, Elizabeth Public Schools
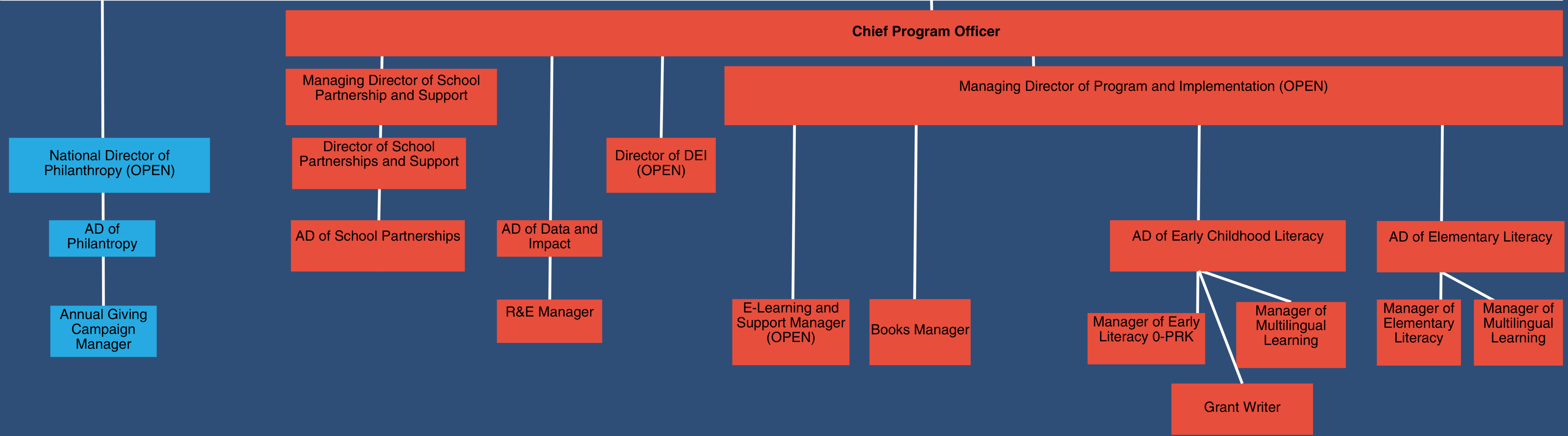908.436.6133, hugelmol@epsnj.org

Ian Krouse | Assistant Principal of K-2 Instruction, Fredrick Douglass Mastery Charter School
215-809-0613, ian.krouse@masterycharter.org

Karen Feldkamp | ELA Supervisor, K-5 Passaic Public Schools
97-470-5222, kfeldkamp@passaicschools.org

# Chief Executive Officer

## Chief Operating Officer

### Director of Marketing and Branding

- AD of Marketing
  - Graphic Design and Social Media Manager
    - Marketing Operations Coordinator
  - National Event Manager
- AD of Branding and Design
  - Branding Manager and Editor
    - Production Operations Coordinator

### AD of Recruitment

### AD of People and Culture
- HR Business Partner

### Controller
- Budget and Payroll Manager
  - Part-time Accountant (OPEN)
  - AP Specialist

### Director of Strategic Partnerships (OPEN)
- Strategic Partnership Manager
- Partnership Data Manager (OPEN)

### Managing Director of Operations
- Senior Tech Manager
- Operations Manager

## Chief of Staff

### AD of HR Compliance and Operations = ES
- HR Operations Manager

### Comliance Manager (OPEN)

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# Chief Executive Officer

## Chief Program Officer

### National Director of Philanthropy (OPEN)
- AD of Philantropy
  - Annual Giving Campaign Manager

### Managing Director of School Partnership and Support
- Director of School Partnerships and Support
  - AD of School Partnerships

### AD of Data and Impact
- R&E Manager

### Director of DEI (OPEN)

### Managing Director of Program and Implementation (OPEN)
- E-Learning and Support Manager (OPEN)
- Books Manager
- AD of Early Childhood Literacy
  - Manager of Early Literacy 0-PRK
  - Manager of Multilingual Learning
    - Grant Writer
- AD of Elementary Literacy
  - Manager of Elementary Literacy
  - Manager of Multilingual Learning

Children's Literacy Initiative
165

**DUVAL COUNTY**
PUBLIC SCHOOLS

November 27, 2023

TO WHOM IT MAY CONCERN:

It gives me immense pleasure to recommend Children's Literacy Initiative (CLI) for literacy-based professional learning services under the leadership of Dr. Diana Greene. Under her leadership as Superintendent of Duval County Public Schools, I was fortunate to have served as her Chief Academic Officer inspired to lead with intellectual curiosity and enthusiasm.

In 2018, Dr. Greene led DCPS to be an early adopter of the Science of Reading. By the end of the 2018-2019 school year, all school-based administrators completed the initial professional learning cycle in the Science of Reading. In the 2019-2020 school year, K-1 classroom teachers, instructional coaches, and reading interventionists engaged in the first wave of professional learning. Although stalled during the COVID-19 pandemic, this did not deter Dr. Greene. DCPS began full implementation of the Science of Reading in grades kindergarten and one in the 2021-2022 school year, one year ahead of the Department of Education's implementation cycle. In becoming an early adopter, instructional administrators and primary teachers served as mentors and teacher leaders as full district implementation took place in May 2022.

I am confident without reservation that CLI, under the direction of Diana Greene would be an excellent fit to implement literacy-based professional learning cycles and coaching support in the Science of Reading. As a tirelessly creative and passionate individual, you will be impressed by the services Children's Literacy Initiative provides, under her leadership.

Feel free to contact me at 904-348-5144 or renfrop@duvalschools.org if you have any questions or would like me to further elaborate on Dr. Greene's achievements during her tenure at Duval County Public Schools.

Sincerely,

Paula S. Renfro
Chief Academic Officer

# ELIZABETH PUBLIC SCHOOLS

*Every Child, Achieving Excellence*

## Olga Hugelmeyer
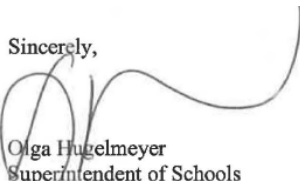Superintendent of Schools

To Whom It May Concern:

As the Superintendent of Schools for the Elizabeth Public Schools, I fully support Children's Literacy Initiative's (CLI) RFP response. We greatly value CLI's work and see the impact of CLI's program in our elementary schools, which sustains quality teaching and increases student achievement. We have found that CLI's intensive, job-embedded professional development services measurably help our teachers become more reflective practitioners and develop their literacy instructional skills. By making a human capital investment in our teachers, CLI is a highly effective force on behalf of our students.

We affirm that this innovative program offered by CLI will enhance the academic program of elementary schools by providing teachers with coaching, training and materials, as well as exposing teachers to exemplary literacy practices. As studies have shown, quality teacher training and sustained job- embedded coaching are invaluable resources for teacher development, retention and student achievement.

In CLI, we have a partner that matches our mission to provide a high-quality education that prepares, ensures, and empowers all students to achieve their full intellectual and social potential in order to become lifelong learners and productive members of society. Thank you for your consideration of Children's Literacy Initiative's application.

If you have any questions or concerns, I would be glad to address them.

Sincerely,

Olga Hugelmeyer
Superintendent of Schools
Elizabeth Public Schools

## Office of the Superintendent of Schools

500 North Broad Street, Elizabeth, New Jersey 07208 • Ph: 908.436.6133 • Fax: 908.436.6133
Email: hugelmol@epsnj.org • Website: www.epsnj.org

To Whom It May Concern:

I am delighted to write this letter of recommendation in support of Ginger Hayes and her work here at Frederick Douglass Mastery Charter School. As the Assistant Principal of Instruction in kindergarten through second grade classrooms, I had both the pleasure and privilege of working with Ginger for three years (2020-2023). During this time, our network was making a shift in aligning our pedagogical practices to the Science of Reading. Much of our daily collaboration involved Ginger's support and implementation of this shift as she coached teachers in systematic phonics and phonemic awareness instruction and small group literacy instruction rooted in the elements of Science of Reading. Every day, I witnessed her partnership with teacher and network leaders to promote equitable literacy practices. She also led professional development workshops and grade level meetings providing teachers the content knowledge needed to make the shift from a Balanced Literacy approach to literacy.

Ginger's expertise was especially critical when we returned to in-person learning after a year of strictly virtual learning experiences. Her deep knowledge of phonological awareness greatly benefitted our work in addressing the needs of our young learners impacted by challenges of virtual learning and access. Ginger successfully supported teachers to develop comprehensive plans for addressing gaps in phonological awareness development, working towards application of skills in connected texts. She was always mindful of using relative strengths to support children not only as an educational strategy but also to bolster confidence and motivation. Ginger understood individual differences and child development, coaching classroom teachers in appropriate strategies, implementing progress monitoring and having true compassion for children.

Ginger is Wilson Reading System certified and used that knowledge in coaching teachers and impacting students, but also encouraged two of our reading interventionalists who are now working towards certification. Her passion for equity in literacy access and instruction has left a lasting impact on our staff.

Please feel free to contact me by phone (215.809.0613) if you have any questions or would like to speak in more detail.

Sincerely,

*Ian Krouse*

Ian Krouse
Assistant Principal of Instruction K-2
Ian.Krouse@masterycharter.org

August 14, 2023

Good day,

I am writing in support of the Children's Literacy Initiative's RFP response for literacy professional development services. As the K-5 ELA Supervisor of Passaic Public Schools, I have had many opportunities to work closely with CLI over the past 8 years to improve early literacy outcomes for the students in Passaic, NJ.

Here in Passaic, CLI has helped to transform the culture around early literacy instruction so our General Education and Bilingual teachers feel supported and empowered in their efforts to get students reading at grade level.  We know that strong teachers are the single most important factor in improving reading proficiency for kids; but we also know that without ongoing opportunities to practice new skills, it's next to impossible for teachers to incorporate new strategies into their instructional approach. By supplementing their training seminars with one-on-one coaching, CLI is giving teachers that extra and critical level of support to make lasting and impactful improvements to their practice.

CLI recently supported Passaic with our new curriculum rollout. This strategic support of implementation has contributed to a successful and consistent launch across the district. Our partnership has provided school-based leaders and teachers with the collaborative opportunities that are critical to fostering the broad adoption and ownership of the early literacy strategies and practices critical for effective instruction.

A partnership with CLI would be a solid investment in an organization that has repeatedly demonstrated an aptitude for scaling its work with high fidelity, while also being flexible in its approach to meet the unique needs of individual partner districts. I enthusiastically lend my voice of support to their application.

Please let me know if I can provide you with any additional information and support.
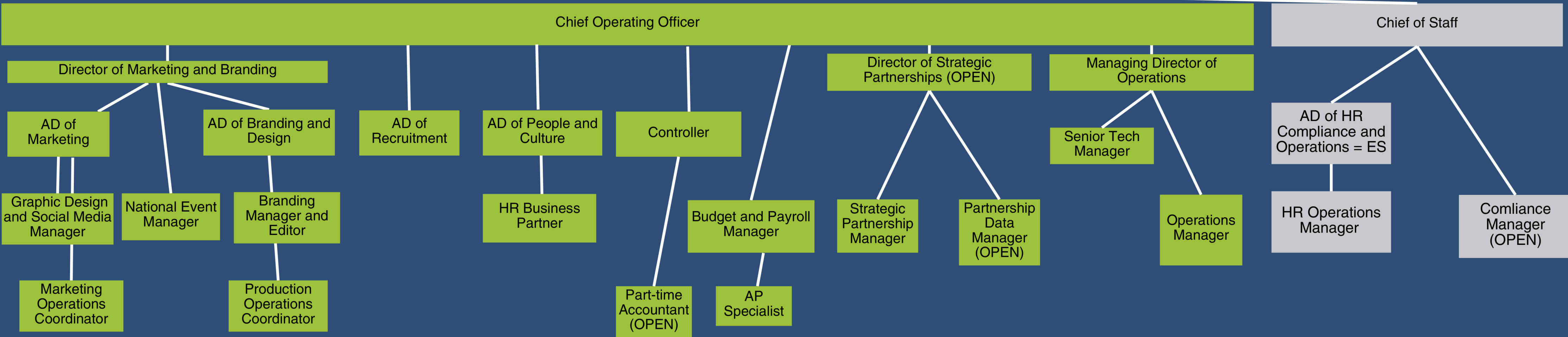
Sincerely,

K ar en F eldkamp

Karen Feldkamp
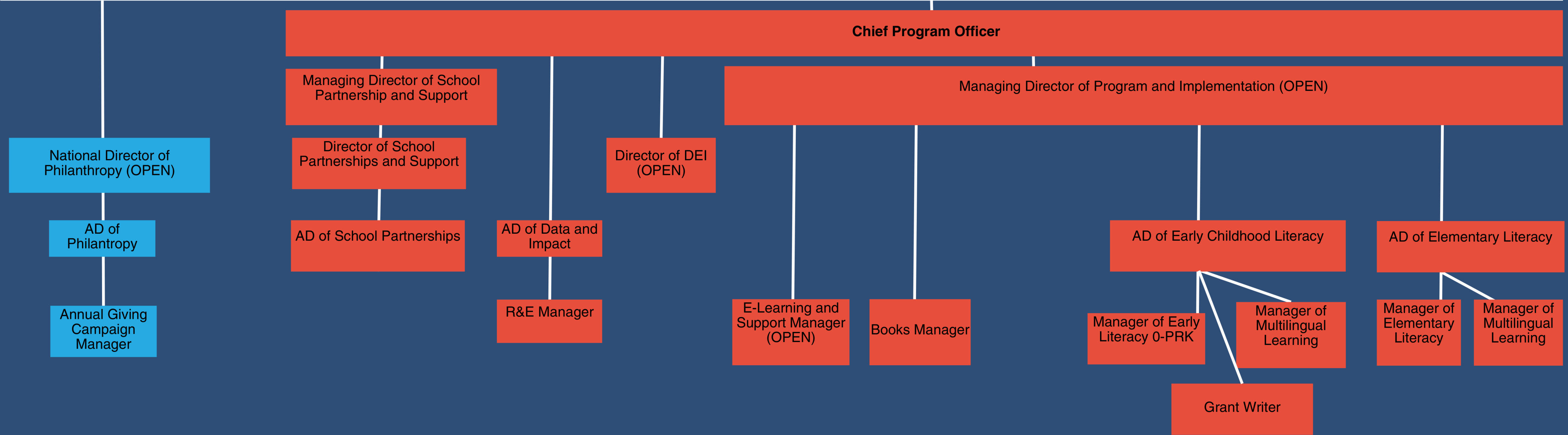ELA Supervisor, K-5 Passaic Public Schools

Division of Elementary and Secondary Education

# Chief Executive Officer

## Chief Operating Officer

### Director of Marketing and Branding
- AD of Marketing
  - Graphic Design and Social Media Manager
    - Marketing Operations Coordinator
  - National Event Manager
- AD of Branding and Design
  - Branding Manager and Editor
    - Production Operations Coordinator

- AD of Recruitment
- AD of People and Culture
  - HR Business Partner
- Controller
  - Budget and Payroll Manager
    - Part-time Accountant (OPEN)
    - AP Specialist

### Director of Strategic Partnerships (OPEN)
- Strategic Partnership Manager
- Partnership Data Manager (OPEN)

### Managing Director of Operations
- Senior Tech Manager
- Operations Manager

## Chief of Staff
- AD of HR Compliance and Operations = ES
  - HR Operations Manager
- Comliance Manager (OPEN)

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# Chief Executive Officer

## Chief Program Officer

- National Director of Philanthropy (OPEN)
  - AD of Philantropy
    - Annual Giving Campaign Manager

### Managing Director of School Partnership and Support
- Director of School Partnerships and Support
  - AD of School Partnerships
- AD of Data and Impact
  - R&E Manager
- Director of DEI (OPEN)

### Managing Director of Program and Implementation (OPEN)
- E-Learning and Support Manager (OPEN)
- Books Manager
- AD of Early Childhood Literacy
  - Manager of Early Literacy 0-PRK
  - Manager of Multilingual Learning
    - Grant Writer
- AD of Elementary Literacy
  - Manager of Elementary Literacy
  - Manager of Multilingual Learning

Children's Literacy Initiative

# Core Service Model

At CLI, we believe in empowering educational excellence through our Core Service Model. This model serves as a comprehensive framework that guides our work and ensures impactful partnerships with our stakeholders. By familiarizing stakeholders with our Core Service Model, we aim to provide a clear understanding of what they can expect when collaborating with CLI.

CLI's Core Service Model is a structured approach that encompasses four key phases: Discovery, Vision Setting and Strategic Planning, Support and Building Capacity, and Stepbacks. Each phase plays a critical role in driving meaningful progre and achieving our shared goals.



Discovery

Vision Setting & Strategic Planning

Stepbacks

Support & Build Capacity

| Phase | Purpose | Resources/Activities |
|---|---|---|
| **Discovery Phase** | In this initial phase, we embark on a journey of understanding. We engage with our partners to learn about their unique school community, building relationships with teachers, school leadership, and students. Through activities such as learning walks, data dives, and focus groups, we gain valuable insights into classroom dynamics and identify strengths and areas of opportunity. | • Leadership intake<br>• Learning Walks<br>• Student work & artifact analysis<br>• Teacher and student focus groups<br>• Data dives<br>• Curriculum and material reviews |
| **Vision Setting and Strategic Planning Phase** | Once we have a comprehensive understanding of the context, we collaboratively develop a shared vision. This phase involves analyzing collected data, conducting root cause analysis, and setting priorities for our work. Together, we create a theory of action, establish goals, and determine individual roles. By developing a strategic plan, we chart a clear path toward instructional growth and improved outcomes. | • Data review<br>• Root cause analysis<br>• Determine priorities and focus of our work<br>• Determine how each stakeholder will support the strategic plan<br>• Determine metrics for success<br>• Develop strategic plan |

cli.org

| Phase | Purpose | Resources/Activities |
|---|---|---|
| **Support and Capacity Building Phase** | In this phase, we bring the strategic plan to life. Our team provides context-specific coaching and support to educators, ensuring they have the necessary resources and skills to implement the plan effectively. We offer targeted professional development opportunities aligned with the strategic goals, empowering teachers, coaches, and leadership teams to thrive. | • Context-specific coaching and support<br>• Development for teachers, coaches, and leadership teams aligned to strategic plan |
| **Stepback Phase** | At strategic and planned intervals, we take a step back to reflect on our progress and make intentional adjustments. We analyze the growth achieved in relation to the initial goals, identifying areas where additional information or refinement may be needed. This reflective analysis informs strategic revisions and ensures that our partnership remains responsive and aligned with evolving needs. | • Analyze growth from initial strategic plan goals<br>• Determine where we need more information |

| Standard/Learning Goal or Focus: | Curriculum/Text: | |
|---|---|---|
| *What we want to be true based on research and best practices…* | Rubric | Notes |

## Books and Materials

Books and materials are central to the read aloud. The books must be thought-provoking and useful for starting and sustaining discussions and should send affirming messages, heighten joy, and serve as windows and mirrors.

| | | |
|---|---|---|
| **A.1 Critical Literacy**<br>Text is complex, grade-level appropriate, and a good candidate for critical literacy instruction. Text contains content, themes, or main ideas that are significant, thought-provoking, and that support analysis. | ☐ Text is not complex or grade-level appropriate.<br>☐ Text is complex but not grade-level appropriate or a good candidate for critical literacy.<br>☐ Text is complex, grade-level appropriate, and a good candidate for critical literacy.<br>☐ Text is complex, grade-level appropriate, a good candidate for critical literacy, and considers the identities of the children in the class. | |
| **A.2 Diversity and Inclusion**<br>Text contributes to the inclusion of diverse voices and ideas in the curriculum. | ☐ Text presents only a narrow perspective (singular story).<br>☐ Text does not contribute to the inclusion of diverse voices and ideas.<br>☐ Text adds to the diversity of ideas, perspectives, and authors.<br>☐ Text adds to the diversity of ideas, perspectives, authors, and contributes to children's understanding of themselves, others, and our world. | |
| **A.3 Social Justice and Equity**<br>Text authentically and accurately reflects the identities (racial, cultural, linguistic), topics, histories, interests, experiences, and motivations of people within it. | ☐ Text contains racial, cultural, or linguistic stereotypes or inaccurate information on a topic.<br>☐ Text paints an incomplete or unauthentic picture of the topics or identities.<br>☐ Text authentically and accurately represents the topics and/or the identities of the people within it.<br>☐ Text authentically and accurately reflects the topics and the identities of people within it and is either culturally relevant to the children in the classroom or provides them with a window to learn about others. | |
| **A.4 Lesson Alignment**<br>Strong alignment exists between the text and standards. | ☐ Text does not align with the standard(s) of the lesson.<br>☐ Text somewhat aligns with the standard(s) of the lesson.<br>☐ Text strongly aligns with the standard(s) of the lesson.<br>☐ Text strongly aligns with learning goals of the lesson and allows for connection with other classroom texts, goals, units, experiences, etc. | |

## Child Actions

Child actions are the expression of the experience children are having during the read aloud. The experience of joy is a result of stimulating intellectual engagement.

### B.1 Language Practices

Children use a variety of language practices and play as they make meaning of the text and develop a love of reading and language

- ☐ Children have little to no opportunities to use all of their language practices.
- ☐ Children's language practices are accepted and encouraged at some times and in some spaces and not others.
- ☐ Children engage in language play and exploration using all their language practices.
- ☐ Children engage in language play and exploration using all their language practices and are excited to explore their own and others' language practices.

### B.2 Collaboration

Children grow and share ideas by collaborating with peers through discussion, questioning, debate, writing, etc.

- ☐ Children have no opportunities to share ideas.
- ☐ Children share answers to low-level or closed questions.
- ☐ Children grow ideas by asking questions, talking to each other, debating, and writing.
- ☐ Children's understanding of the text changes and grows as a result of their ongoing collaboration with peers.

### B.3 Anchoring Learning in the Text

Children cite evidence from the text to support their understanding of the deepest meaning of the text, attending to vocabulary, syntax, language choice, illustrations, author's craft, and other text structures and features.

- ☐ Children do not cite evidence from the text that moves the discussion towards the deepest meaning of the text.
- ☐ Children inconsistently cite evidence from the text that moves the discussion towards the deepest meaning of the text.
- ☐ Children consistently cite evidence from the text that moves the discussion towards the deepest meaning of the text.
- ☐ Children additionally cite evidence from the text that moves the discussion towards the deepest meaning of the text and to support, clarify, and challenge each other's ideas and viewpoints.

### B.4 Social Justice and Equity

Children identify and discuss the cultural, linguistic, racial, and social justice ideas/themes within the text.

- ☐ Children do not identify or discuss issues of social justice and/or equity within the text.
- ☐ Children identify issues of social justice and/or equity within the text.
- ☐ Children identify AND discuss issues of social justice and/or equity within the text.
- ☐ Children independently make connections to external social justice and equity issues (real life, other texts, etc.) using ideas within and beyond the text.

### B.5 Connecting Learning

Children synthesize and apply key learnings from text across other texts, learning experiences, and life experiences.

- ☐ Children do not make connections to the text or key learnings.
- ☐ Children connect to the text in basic or superficial ways.
- ☐ Children use their connections to the text to develop key learnings, original ideas, and conclusions about the text.
- ☐ Children use their connections to the text to develop key learnings, original ideas, and conclusions about the text and apply their key learnings from the text to other texts, learning experiences, and life experiences.

## Teacher Actions

Teacher actions are intentional and aligned to the experience children should have. The teacher must genuinely value everyone's presence and recognize that everyone contributes to learning.

### C.1 Intellectual Prep & Language Practices

Teacher facilitates discussions among children that support them in arriving at the deepest meaning of the text by asking questions that are grounded in the text; children's contributions and responses in all language practices are honored.

- ☐ Teacher does most of the talking with little to no facilitation of discussion among children.
- ☐ Teacher facilitates some peer discussion that may or may not arrive at the deepest meaning of the text.
- ☐ Teacher facilitates discussions grounded in the text and supports them in arriving at the deepest meaning of the text.
- ☐ Teacher facilitates discussions among children that honor diversity of thought; children use their language practices freely as they gain a deeper understanding of the text.

### C.2 Instructional Routines & Pacing

Teacher uses instructional routines that support children's understanding of the deepest meaning of the text by including appropriate think time, talk time, wait time, and feedback.

- ☐ Teacher includes instructional routines and feedback primarily focused on classroom management.
- ☐ Teacher includes too many or too few opportunities for think time, talk time, wait time, and/or feedback that focuses on right or wrong responses.
- ☐ Teacher includes instructional routines that consider the differences among children by pacing the lesson to provide think time, talk time, wait time, and feedback that is direct and non-judgmental.
- ☐ Teacher includes instructional routines that consider the differences among children and provide opportunities for children to utilize feedback to reflect, apply, and contribute to their learning and the learning of others.

### C.3 Anchoring Learning in the Text

Teacher scaffolds children's understanding of the deepest meaning of the text by drawing their attention to specific phrases, words, illustrations, and language practices that are significant to understanding.

- ☐ Teacher provides little to no scaffolding for children to use textual evidence to grow their understanding towards the deepest meaning of the text.
- ☐ Teacher provides some scaffolding for children to use textual evidence to grow their understanding towards the deepest meaning of the text.
- ☐ Teacher consistently provides scaffolding for children to use textual evidence to grow their understanding towards the deepest meaning of the text.
- ☐ Teacher flexibly uses scaffolds that meet the diverse needs of children to enable all children to use textual evidence to grow their understanding towards the deepest meaning of the text.

### C.4 Social Justice and Equity

Teacher dedicates time and attention to criticality so that children read, write, think, and speak in ways to understand power and equity.

- ☐ Teacher does not notice or dedicate time to discuss social justice themes, bias, stereotypes, and inequities in the text with children.
- ☐ Teacher points out but does not discuss social justice themes, bias, stereotypes, and inequities in the text with children.
- ☐ Teacher notices and dedicates time to discuss social justice themes, bias, stereotypes, and inequities in the text with children.
- ☐ Teacher notices and dedicates time to discuss social justice themes, bias, stereotypes, and inequities in text with children and prompts and supports children to take action.

### C.5 Connecting Learning

Teacher creates opportunities for children to synthesize, connect, and apply their learning; teacher stamps key learnings throughout the lesson.

- ☐ Teacher does not create opportunities for children to make connections, synthesize, and apply their learning.
- ☐ Teacher creates opportunities for their own connections or low-level child connections (e.g., "thumbs up if…").
- ☐ Teacher creates opportunities for children's meaningful connections.
- ☐ Teacher creates opportunities for children to apply their connections and stamps key learnings.

## Classroom Ecology

Classroom ecology is the interdependence of the people and the space. The classroom ecology is inclusive, respectful, and affirming. It promotes a positive self-identity so that children feel comfortable sharing their whole selves: their cultures, languages, gifts, talents, oral traditions, etc. It offers access, choice, voice, and the materials and tools necessary for children to thrive.

### D.1 Extend Learning

Spaces, time, and materials are designed to extend and support children's learning (e.g., learning centers, library, writing tools, and anchor charts).

- ☐ There are no or limited spaces and materials to support and extend children's learning.
- ☐ There are learning centers and spaces but no time or opportunity to extend or apply learning.
- ☐ The classroom has materials, time, and spaces where children independently extend their learning from the read aloud.
- ☐ Spaces or materials offer a variety of choices for children to apply, explore, and extend their learning.

### D.2 Seating Arrangements Build Ideas

Seating arrangements promote conversation and sharing of ideas amongst children.

- ☐ Seating is arranged to facilitate discussion between teacher and children only.
- ☐ Seating arrangements promote limited conversations (e.g., only turn and talk).
- ☐ Seating arrangements support whole group and partner discussions.
- ☐ Seating arrangement configurations are used flexibly to promote conversation and idea sharing.

### D.3 Access to Text

Children have access to read aloud text through visual and/or auditory means.

- ☐ Not all children have access to the text.
- ☐ Children have access to the text (visual, auditory, tactile) but it is unstructured, inconsistent, not developmentally appropriate, or highly managed by the teacher.
- ☐ Children have full access to the text (visual, auditory, tactile) to allow them to build comprehension, cite evidence, and learn about the forms and functions of print.
- ☐ Children have full access and autonomy over the text at any time to cite evidence, review text, and confirm their thinking.

### D.4 Culture, Identity, and Language

Artifacts and children's work represent their language practices, interests, cultures, and identities.

- ☐ There are few or no artifacts or children's work in the classroom.
- ☐ There are artifacts and children's work in the classroom, but they do not reflect all children's cultures, identities, and languages.
- ☐ The artifacts and children's work in the classroom represent their language practices, interests, cultures, and identities.
- ☐ Children access and use the artifacts in the classroom to learn about the classroom, themselves, each other, and the world; artifacts are an extension of their learning.

| Standard/Learning Goal or Focus: | Curriculum/Text: | |
|---|---|---|
| *What we want to be true based on research and best practices…* | Rubric | Notes |

## Books and Materials

| | | |
|---|---|---|
| ☐ Using a systematic, research-based foundational skills program | | |
| **A.1 Lesson Alignment** Alignment exists between the tasks, activities, and materials and the skills, standards, and learning goals. | ☐ Tasks, activities, and or materials do not align with the skills, standards, and learning goals. <br> ☐ Tasks, activities, and materials partially align with the skills, standards, and learning goals. <br> ☐ Tasks, activities, and materials mostly align with the skills, standards, and learning goals. <br> ☐ Tasks, activities, and materials are fully aligned with the skills, standards, and learning goals. | |
| **A.2 Materials Support Multimodal Learning** Materials provide opportunities for children to engage in speaking, hearing, writing, reading, letter manipulation, and kinesthetics. | ☐ There are no materials for multimodal learning. <br> ☐ Materials provide limited opportunities for multimodal learning. <br> ☐ Materials provide opportunities for children to engage in multimodal learning. <br> ☐ Materials support a variety of learning styles and allow for flexibility to meet children's diverse learning needs. | |
| **A.3 Diversity of Text** Texts are free of bias, are interesting, and affirm the children's identities, cultures, and languages. | ☐ Texts contain racial, cultural, or linguistic stereotypes. <br> ☐ Texts are free of bias but do not affirm the children's identities, cultures, and languages. <br> ☐ Texts are free of bias and interesting and affirm the children's identities, cultures, and languages. <br> ☐ Texts represent and affirm diverse perspectives, cultures, and languages and grow children's understanding of the world. | |
| **A.4 Materials Extend Learning** Materials suggest that the teacher connects and extends learning beyond the lesson. For example, work stations/centers, anchor charts, adaptive technology, etc., are present. | ☐ No materials exist to extend learning beyond the lesson. <br> ☐ A limited number of materials exist to extend learning beyond the lesson. <br> ☐ Materials are available to extend learning beyond the lesson. <br> ☐ Materials are available to extend learning beyond the lesson and are differentiated to match children's interests and individual learning needs and styles. | |

## Child Actions

### B.1 Opportunities for Authentic Practice
Children have multiple opportunities to practice and apply foundational skills both in and out of context.

- ☐ Children have few or no opportunities to practice foundational skills.
- ☐ Only some children practice and apply foundational skills and/or children don't have ample opportunity to practice.
- ☐ All children have many opportunities to practice and apply foundational skills.
- ☐ All children have many opportunities to practice and apply foundational skills in authentic reading and writing contexts.

### B.2 Experiment and Explore Words & Sounds
Children have opportunities to manipulate sounds, letters, and words to grow, share, and foster understanding and curiosity about language.

- ☐ Children are passive listeners with no opportunities to manipulate sounds, letters, and words.
- ☐ Children manipulate sounds, letters, and words in some tasks and activities but not others.
- ☐ Children manipulate sounds, letters, and words to grow their understanding.
- ☐ Children manipulate sounds, letters, and words, showing curiosity and language exploration in collaboration with peers.

### B.3 Active Learning
All children feel safe to take risks and have access to participate in the learning of the lesson, sharing their ideas, learning, and expertise.

- ☐ Children are passive and/or only respond when they know the correct answer.
- ☐ Only some children contribute responses.
- ☐ All children actively participate in the lesson and contribute responses.
- ☐ All children participate in the lesson. Children contribute ideas and ask questions to grow their own and others' understanding.

### B.4 Linguistic Appreciation
Children share their language practices while having the opportunity to learn, leverage, and appreciate the language practices of others.

- ☐ Children have no opportunities to share their own language practices.
- ☐ Children's language practices are accepted and encouraged at some times but not others.
- ☐ Children share their language practices and learn about and appreciate the language practices of others.
- ☐ Children share their own language practices, learn about and appreciate the language practices of others, and have opportunities to interrogate the role language plays in systems of power.

### B.5 Task & Activity
Children are engaged in the most purposeful work of the lesson to support their learning goals.

- ☐ Children are engaged in tasks that don't build their foundational skills.
- ☐ Children are engaged in foundational skills work, but tasks are not aligned with their learning goals
- ☐ Children are mostly engaged in tasks and activities that support their learning goals.
- ☐ Children engage with tasks and activities that support their learning goals.

## Teacher Actions

### C.1 Content Knowledge
The teacher demonstrates an understanding of the content of the lesson.

- ☐ The teacher has no understanding of the content of the lesson.
- ☐ The teacher has some understanding of the content of the lesson.
- ☐ The teacher demonstrates an understanding of the content of the lesson.
- ☐ The teacher has a full/complete understanding of the content of the lesson and uses the knowledge to support individual children's learning.

### C.2 Learning in Community
The teacher invites children to take risks, ask questions, and share ideas about the content of the lesson.

- ☐ The teacher does not invite children to take risks, ask questions, and share ideas.
- ☐ The teacher invites some children to take risks, ask questions, or share ideas.
- ☐ The teacher invites all children to take risks, ask questions, and share ideas about the content of the lesson.
- ☐ The teacher consistently invites all children to take risks, ask questions, and share ideas, responding in a way that honors children's input.

### C.3 Leverages Data
The teacher intentionally uses data to differentiate the lesson, monitor the learning of children, and adapt in the moment.

- ☐ The teacher does not monitor the learning of students throughout the lesson.
- ☐ The teacher monitors the learning of some/a few students throughout the lesson.
- ☐ The teacher monitors the learning of most students throughout the lesson and adapts the lesson to support some children's success.
- ☐ The teacher is consistently monitoring the learning of each student throughout the lesson and adapts the lesson to support children's success.

### C.4 Routines & Pacing
The teacher uses instructional routines to support the pacing of the lesson and maximize children's autonomy and learning time.

- ☐ The teacher uses no routines to support children's learning time.
- ☐ The teacher uses ineffective routines that do not maximize children's learning time.
- ☐ The teacher uses instructional routines that maximize children's learning time.
- ☐ The teacher uses instructional routines that maximize children's autonomy and learning time.

### C.5 Feedback
The teacher provides targeted and purposeful feedback that supports children in improving and strengthening their skills.

- ☐ The teacher provides no feedback.
- ☐ The teacher provides feedback, but it does not support children to improve or strengthen their practice.
- ☐ The teacher provides targeted and purposeful feedback to children that supports them in improving or strengthening their skills.
- ☐ The teacher provides targeted and purposeful feedback that supports children in improving and strengthening their skills. The teacher encourages children to support and give feedback to each other.

### C.6 Language Diversity
The teacher affirms children's language practices and encourages children's curiosity and exploration of language.

- ☐ The teacher does not affirm children's language practices or encourage curiosity and exploration of language.
- ☐ The teacher occasionally affirms children's language practices or encourages children's curiosity and exploration of language.
- ☐ The teacher often affirms children's language practices and encourages curiosity by providing opportunities for children to play with and explore language.
- ☐ The teacher often affirms children's language practices and encourages curiosity by providing opportunities for children to play with and explore languages. The teacher leverages their contributions to foster language appreciation for all children.

## Classroom Ecology

### D.1 Print Rich
Environmental print supports children's understanding of foundational skills (e.g., concepts of print; word, linguistic, and phonemic awareness; and vocabulary development).

- ☐ There is limited print to support children's understanding of foundational skills.
- ☐ Environmental print is present but not used to support children's understanding and practice.
- ☐ Environmental print is used to support children's understanding of foundational skills.
- ☐ Children independently access environmental print to support their learning and practice beyond the lesson.

### D.2 Inclusive and Affirming
The classroom is affirming and inclusive, valuing children's identities, contributions, and efforts.

- ☐ Children's identities, contributions, and efforts are not valued, and/or some children are excluded from learning.
- ☐ Some children's identities, contributions, and efforts are affirmed, but not others.
- ☐ Children's identities, contributions, and efforts are affirmed.
- ☐ Children affirm each other's identities, contributions, and efforts.

### D.3 Space and Materials
Space and materials are purposeful and organized to support children's learning and practice.

- ☐ Space and materials are unorganized and do not support children's learning and practice.
- ☐ Space and materials are organized, but not all are purposeful.
- ☐ Space and materials are purposeful, organized, and differentiated to meet children's needs.
- ☐ Space and materials are purposeful, organized, and differentiated to meet children's needs. The organization maximizes children's time on task.

# Digital Framework For Teaching and Learning:

We have taken our Framework For Teaching and Learning that is rooted in research based best practices and built out an app to input our data

**Why**
- Inputting data into a digital framework allows us to create real time reports
- It aligns with our Organizational priorities

**Who**
- Our coaches collect data using a four-point rubric in the classrooms they support.

**What**
- Currently we are collecting data on Shared Text/Read Aloud and Foundational Skills-indicators are grouped into four categories: Books & Materials, Child Actions, Teacher Actions and Classroom Ecology
- We are working to build out small group instruction to be implemented in SY25

**When**
- Currently we collect data in the beginning and end of the year with progress monitoring opportunities as needed
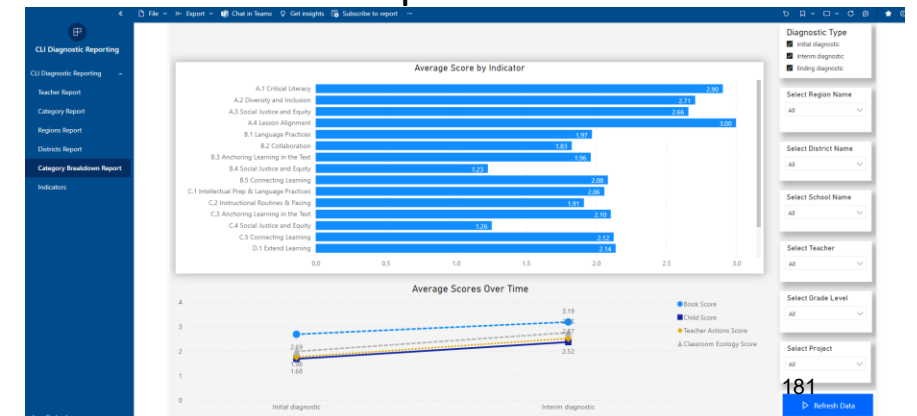
**How**
- Coaches have received trainings on the digital framework and can input data and use reports to drive their coaching
- Market leaders can access reports to determine health of projects
- Programming team can use the digital framework to inform future professional development needs

## Digital Tool/App



## Reports



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# Training Catalog

| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| **Classroom Ecology** | **Engagement, Motivation, and Belonging** | This session will ground educators in deeply understanding the children we serve and the critical need for educators to recognize their own identity and biases, to reflect on their influence over their expectations, decision making, and interactions with children. This allows for a sense of connectedness and builds successful relationships with children whose racial and cultural backgrounds are different from their own.<br><br>**Goals**<br>• Gain an understanding of racial identity theory and explore our own identity<br>• Use the knowledge of racial identity to develop strategies we can use in our work within the school community<br>• Explore what it means to feel a sense of belonging and how race, culture, ethnicity, and language practice affect a child's sense of belonging<br>• Learn seven ways educators can increase and protect Black and Latinx children's sense of belonging<br>• Take an inquiry approach to investigate our classroom practices through the lens of belonging<br>• Build partnerships and engage families in literacy instruction to create a community-wide focus on literacy | 5 hours | Coaches, Teachers, and Administrators |
| **Components of Skilled Reading OR Literacy Instruction** | **Understanding the Science of Reading and Instructional Practices** | Reading is a complex process that involves different skills, processes, strategies, and understandings. These complexities can be broken down into 2 broad categories:<br>1. word recognition (decoding) and<br>2. language comprehension.<br><br>These two processes working together result in Reading Comprehension - the ability to understand and interpret what is being read, the ultimate goal of reading. | 5 hours | Coaches, Teachers, and Administrators |

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| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| | | In this session we will explore the components of skilled reading and writing, including orthographic mapping, phonological and phonemic awareness, phonics, fluency, vocabulary, comprehension, and more.<br><br>**Goals:**<br>• Understand the components of skilled reading<br>• Explore ways to support reading development | | |
| **Writing** | **Writing Standards and Process** | In this training we will examine specific examples from the writing learning standards and identify opportunities for incorporating culturally sustaining practices<br><br>**Goals**<br>• Review the writing process and understand the importance of each stage and how to teach children to use the process to plan, organize, and produce effective writing | 5 hours | Coaches and Teachers |
| **Literacy Instruction for English Language Learners**<br><br>**Foundational Skills** | **Emergent Literacy and Language Development** | In this training we will gain an understanding of the concept of phonological and phonemic awareness and how it serves in literacy acquisition<br><br>**Goals:**<br>• Develop guiding principles for teaching/learning phonological and phonemic awareness<br>• Understand how to assess phonological and phonemic awareness and how to use data to drive instruction<br>• Plan a range of student activities for teaching phonological and phonemic awareness appropriate for children of varying reading stages<br>• Understand orthography and understand its role in reading and writing development.<br>• Develop strategies to support students' orthographic processing skills.<br>• Learn strategies to teach print concepts to support early literacy development<br><br>*Primarily for Coaches of K-3 Teachers* | 5 hours | Coaches and Teachers |

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| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| **Foundational Skills** | **Accuracy/ Understanding Phonics** | In this training we will understand the WHAT, WHY, and HOW of phonics acquisition<br><br>**Goals:**<br>• Develop guiding principles for teaching/learning phonics<br>• Understand how to assess phonics and use data to drive instruction<br>• Plan for phonics lessons with renewed understanding of phonics acquisition process | 3 hours | Coaches and Teachers |
| **Leadership Training** | **Diagnosing Instruction Goals** | In this training we will align our vision of effective foundational literacy learning experiences<br><br>**Goals:**<br>• Increase capacity to use an instructional framework to diagnose literacy instruction<br>• Practice using the Teacher Coaching Tool to set goals | 3 hours | School and Systems Leaders |
| **Leadership Training** | **Examining Data & Goal Setting** | **Goals:**<br>• Understand the role of data in reflecting and planning<br>• Use data to drive discussions and pre-planning for the future | 3 hours | School and Systems Leaders |
| **Family and Community Engagement** | **Fostering Meaningful Community Connections** | This training consists of educator professional development that will deepen understanding and strengthen culturally sustaining family engagement<br><br>**Goals**<br>• Educators will be able to recognize and leverage the diverse funds of knowledge that families bring to the educational setting, fostering meaningful family connections that enhance student learning and engagement | 3-5 hours | All-Staff |

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| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| **Foundational Skills** | **Orthography, Orthographic Processing and Print Concepts** | Reading is a complex process involving different skills, processes, and strategies. Join us to learn how to support children's emergent literacy skills and help them grow into readers and writers. In this session, we will provide an overview of the Simple View of Reading and Scarborough's Reading Rope to understand the components of skilled reading. We will explore ways to support emergent reading development through concepts of print, alphabet knowledge, alphabetic principle, phonology, and orthographic processing.<br><br>**Goals:**<br>• Understand the components of skilled reading<br>• Explore ways to support emergent reading development | 1 hour | Coaches and Teachers |
| **Foundational Skills** | **Phonological Awareness and Processing** | Phonological awareness is a critical early literacy skill that supports children in recognizing and working with the sounds of spoken language. During this session, we will develop and build a common understanding of what components are included in phonological awareness and why they are important for children's early literacy learning. We will explore practical ways that we can use phonological awareness activities to help children identify and manipulate sounds in speech.<br><br>**Goals:**<br>• Understand the concept of Phonological Awareness and how it serves in literacy acquisition.<br>• Explore a range of activities to support Phonological Awareness instruction | 1 hour | Coaches and Teachers |

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| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| **Foundational Skills** | **Phonemic Awareness** | Phonemic awareness is the ability to notice, think about, and work with the smallest individual sounds in spoken words. To fully understand language, children need practice around individual phonemes to understand the relationship among words, letters, and sounds. In this session, we will develop and build a common understanding of the components included in phonemic awareness instruction and explore activities that support children to notice, articulate, and manipulate phonemes.<br><br>Goals:<br>• Understand the concept of Phonemic Awareness and how it serves in literacy acquisition<br>• Examine and practice a range of activities for teaching Phonemic Awareness | 1 hour | Coaches and Teachers |
| **Foundational Skills** | **Fluency** | Fluency is the ability to read words, phrases, sentences, and connected text accurately, at an appropriate pace, and with expression. Fluency is a bridge between word recognition and comprehension, allowing readers to make meaning for a text "on the run." In this session, we will learn the elements of fluency, and how to assess a child's fluency. We will explore ways to support children's reading fluency through modeling and repeated reading.<br><br>**Goals:**<br>• Understand what reading fluency is and why it is important<br>• Explore strategies for supporting emergent and early reader's fluency<br>• Expand knowledge of how fluency is developed<br>• Understand the intersection between fluency and instructional practices<br>• Plan for fluency instruction across literacy practices | 1 hour | Coaches and Teachers |

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| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| **Vocabulary** | **Vocabulary** | Vocabulary refers to the kinds of words and phrases children must know and understand to read increasingly challenging texts with comprehension. Building children's vocabulary is an incredibly important component of literacy instruction. When children know more words, they can comprehend more of what they read, communicate more of what they know, and develop a joy of reading! In this session, we will outline three ways that will help increase children's vocabulary development. We will also explore some ways we can help build children's vocabulary.<br><br>**Goals:**<br>• Understand why vocabulary matters in literacy instruction<br>• Identify effective strategies that foster vocabulary learning | 1 hour | Coaches and Teachers |
| **Leadership Training** | **Foundational Literacy Skills for School and System Leaders** | Impactful leaders recognize that teaching and learning are complex and nuanced endeavors. To support your charge as the lead teacher and learner in your school, we will review foundational literacy skills and identify guiding principles to establish a culture supportive of high-quality, sustained professional learning. Further, we will share guidance on how to review instructional materials and assessments to ensure that they are high-quality and aligned to standards. | 2 hours | School and Systems Leaders |

| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| | | **Goals:**<br>• Foster collective responsibilities to provide cutting-edge instruction so that all children are ensured equitable learning opportunities<br>• Identify how school leaders can support teachers in growing early literacy content knowledge and high-leverage practices<br>• Reflect on your school's literacy achievement and identify scaffolds and resources that support continued growth | | |
| **Writing** | **Writing about Reading** | In this training we will explore how to use writing as a tool for learning across content areas<br><br>**Goals:**<br>• Learn how to effectively coach teachers to integrate writing instruction into all subject areas<br>• Explore how to use writing to help children develop critical thinking, problem-solving, and communication skills<br>• Understand the importance of integrating writing instruction into all subject areas | 3 hours | Coaches and Teachers |
| **Leadership** | **Supporting Professional Learning Communities to Deliver Equitable Instruction** | In this training we will design a system to support effective literacy instruction, including effective programs, resources, and coaching for teachers | 5 hours | Administrator |
| **Literacy** | **Assessing Literacy** | • Understand and analyze sources of data<br>• Use data to inform and individualize instruction<br>• Check for understanding, monitoring progress, and using data to adapt instruction in the moment | Varies | Teachers and School Leaders |

| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| **Literacy Instruction** | **Small Group Instruction** | In this training we will learn to understand how to use small groups to differentiate literacy instruction<br><br>**Goals:**<br>• Understand the different types of small group instruction children can engage in so they experience diverse texts and diverse groups<br>• Understand how to plan for small group instruction by grouping readers, selecting and analyzing texts, and determining a focus for learning<br>• Examine the components of a small group lesson | Varies | Teachers and School Leaders |
| **Writing** | **Written Expression** | In this training we will understand how to assess student writing to drive instruction<br><br>**Goals:**<br>• Learn how to provide feedback and support children's writing growth<br>• Explore how to use writing as a tool for learning across content areas<br>• Explore how to use writing to help children develop critical thinking, problem-solving, and communication skills<br>• Review the writing process and understand the importance of each stage and how to teach children to use the process to plan, organize, and produce effective writing | Varies | Teachers and School Leaders |

| Category | Training Name | Training Description | Length | Audience |
|----------|---------------|---------------------|--------|----------|
| **Shared Reading** | **Reading, Analyzing and Discussing Texts** | Reading, Analyzing and Discussing Texts offers ideas and guidance around the materials, routines, and interactions to support high-level, meaningful, joyful, and equitable literacy instruction through shared reading.<br><br>This course will enhance participants' ability to facilitate higher-order discussions and critical conversations using their current reading curriculum.<br><br>**Goals:**<br>• Build students' complex language comprehension such as analysis, synthesis, and critical thinking to make judgment statements<br>• Give students access and exposure to a wide range of texts<br>• Promote motivation, engagement, and joy in reading<br>• Disrupt the "pedagogy of poverty" by building on students' cognitive capacity<br>• Give students agency through critical literacy<br>• Sustain and affirm students' linguistic, racial, and cultural assets | Single, 3-hour session | Coaches and Teachers |

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| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| **Reading Workshop** | **Reading Workshop 1: Routines, Procedures and Environments to support Reading Workshop** | Reading Workshop is an instructional practice through which we help children grow as readers. In order to do that, it's helpful to create a common definition of what strong, or admirable, readers do. What are they like? What makes someone a strong reader?<br><br>**Goals:**<br>• Understand how children grow as readers<br>• Understand highly effective reading instruction<br>• Understand how to create a classroom environment that supports Reading Workshop<br>• Understand the purpose and structure of Reading Workshop | 5 hours | Coaches and Teachers |
| **Reading Workshop** | **Reading Workshop 2: Conferring With Readers** | In this training we will uncover why Reading Workshop is a critical part of your literacy block, have a chance to reflect on our current reading instruction, and learn how to strengthen the components of Reading Workshop- particularly the Mini-Lesson and conferences.<br><br>**Goals:**<br>• Understand why Reading Workshop is a critical part of our literacy block<br>• Examine the breadth and depth of our Reading Workshop Mini-Lessons<br>• Examine the breadth and depth of our Reading Conferences<br>• Experience the Share Time in Reading Workshop | 5 hours | Coaches and Teachers |

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| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| **Writing** | **Writing Workshop 1: Understanding Writing Development and the Writing Process** | Writing Workshop is a powerful way teach children how to write. Becoming a strong, effective, fluent writer is one of the most powerful tools we can give to our children.<br><br>**Goals:**<br>• Understand what children need in order to develop and grow as writers<br>• Understand our role in effective writing instruction<br>• Understand the structure of Writing Workshop and how to implement it<br>• Understand how to create a classroom culture and environment that supports writers | 5 hours | Coaches and Teachers |
| **Writing** | **Writing Workshop 2: Using Mentor Texts and Planning Units of Study** | Writing Workshop is a place where we can script ideas, arrange them in a particular order, and create certain effects inside our readers.  Writing is hard work- writing well is even harder- but it is also rewarding and satisfying and worth the effort! In this seminar we will explore our role in creating a community of writers where ALL children can write purposefully, confidently, and joyfully. Becoming strong, effective, fluent writers and having our children see themselves as such, is one of the most powerful tools we can give to children.<br><br>**Goals:**<br>• Understand planning of units of study in Writing Workshop<br>• Understand our role of teacher as writer<br>• Examine the writing process through writing mini-lessons<br>• Learn strategies to strengthen our writing conferences during work time<br>• Learn different ways to share and celebrate writing | 5 hours | Coaches and Teachers |

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| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| **Shared Reading** | **Purposeful Talk: Collaborative Conversations and Effective Text Discussion** | In this training we explore how we can teach children the skills to engage in meaningful text discussion and collaborative conversations<br><br>**Goals:**<br>• Build an understanding of what purposeful talk means and why it is important<br>• Learn how to create a classroom culture and environment conducive to purposeful talk<br>• Practice planning for a rich text discussion<br>• Explore the teacher's role in facilitating meaningful discussions | 5 hours | Coaches and Teachers |
| **Shared Reading** | **Shared Reading: Building Comprehension through Text Discussion, Citing Evidence and Getting to the Deepest Meaning of Texts** | We will build a shared understanding of what the practice looks like, and begin to explore how we can implement effective shared reading lessons.<br><br>**Goals:**<br>• Build our understanding of what shared reading is, and why it is an essential practice<br>• Explore effective practices in shared reading across the grades<br>• Understand what to look for in a shared reading lesson | 5 hours | Coaches and Teachers |

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| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| **Literacy in the Content Areas** | **Enhancing Literacy in the Content Areas** | Literacy skills are of utmost importance in building content knowledge across various subject areas. Proficient reading and writing abilities enable individuals to access and comprehend informational texts, academic resources, and research materials. By effectively reading and comprehending content-specific texts, learners can gain a deeper understanding of concepts, theories, and ideas within a particular discipline. Whether it is science, history, mathematics, or any other subject, literacy skills serve as the foundation for acquiring, interpreting, and applying knowledge. They facilitate effective communication, enable students to engage in higher-level thinking, and empower them to be active participants in their own learning.<br><br>**Goals:**<br><ul><li>Understand how to implement consistent literacy skill building across the content areas in order to assist students in developing deeper strategies for engaging in reading</li><li>Plan opportunities for creative literacies and interdisciplinary work that connect to the lives and interests of students and promote a sense of pride and joy</li><li>Creatively use a variety of teaching approaches to scaffold learning</li></ul> | 3 hours | Teachers and School Leaders |

| Category | Training Name | Training Description | Length | Audience |
|----------|---------------|---------------------|--------|----------|
| **School and System Leadershp** | **Effective School Improvement for School Leaders** | This session will lead educators through the elements of an effective instructional improvement cycle and help them better understand the interconnectivity of each element. The session is designed for leaders at all levels and builds on the current knowledge and skills of the participants.<br><br>**Goals:**<br>• Gain a deeper understanding of instructional improvement models through examination of each component<br>• Use site-based data to assist leaders in the development of strategies to improve instruction, a timeline for monitoring for results, reflection and revision as needed<br>• Examine barriers to school improvement and strategies to combat issues<br>• Examine structures for staff and parent engagement in School Improvement models | 5 hours | Administrators and School Leaders |
| **School and System Leadership** | **Reflective Leadership** | This session will explore how the leader manages and prioritizes core leadership competencies and maintains instructional focus while concurrently managing day to day operational matters.<br><br>**Goals:**<br>• Explore key organizational supports to help leaders maintain a focus on instructional programming<br>• Provide school and instructional leaders with tools to foster facilitative leadership amongst faculty and staff<br>• Investigate opportunities to disrupt inequitable practices and build collaborative relationships with internal and external stakeholders | 5 hours | Administrators and School Leaders |

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| Category | Training Name | Training Description | Length | Audience |
|---|---|---|---|---|
| **School and System Leadershp** | **The Power of Learning Walks** | This session guides site-based leaders through instructional learning walks and how to effectively use the information to improve instructional practice and student performance.<br><br>**Goals:**<br>• Develop a deeper understanding of how to use this instructional strategy to monitor teacher practice and provide immediate, targeted feedback<br>• Expand strategies to engage faculty and staff in efforts to close learning gaps among students in all subgroups within the school<br>• Tools will be provided to assist school leaders with identifying professional development opportunities that enable faculty to deliver culturally relevant and differentiated instruction | 5 hours | Administrators and School Leaders |
| **School and System Leadership** | **Strengthening Academic Outcomes through Site-Based Leadership** | This session examines how school leaders can directly impact student performance outcomes through transformational coaching with staff. The session explores how coaching relationships and expectations impact teacher performance.<br>**Goals:**<br>• Develop a deeper understanding of an evidence based coaching model and how to use it to improve student outcomes through focused teacher behaviors<br>• Explore the difference between coaching and mentoring and understand when to use each | 5 hours | Administrators and School Leaders |