



DISTRICT
MANAGEMENT
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January 12th, 2015

Dr. Halley Freitas, Senior Director
Assessment and Program Evaluation
Tucson Unified School District
442 E. 7th Street
Tucson, AZ 85705

Dear Dr. Freitas,

The District Management Council (DMC) is pleased to present this proposal to support The Tucson Unified School District in assessing the effectiveness of the Learning Support Coordinators (LSCs). This letter and attached overview detail the approach and fee for an engagement.

DMC would assess the effectiveness and cost effectiveness of the LSC role throughout the district based on the intended outcomes of the role and a negotiated timeline considering district needs. DMC will work closely with district leaders, the learning support coordinators, and the Special Master to gain agreement early-on in the process on the intended purpose and desired outcomes for this important, and multifaceted role.

Given the complexity of the role, DMC will utilize our web-based technology, dmPlanning, that provides a detailed understanding of how staff use their time to augment the data collected electronically already. As one component of the review, all LSCs will share via an online calendar everything they do during a typical week. This will provide an important fact base for evaluating the impact of the role.

Our goal is not just to deliver a bound report, but rather to effect meaningful, real improvement for students and taxpayers. DMC combines deep knowledge and much research with a well-developed approach to facilitating change.

We appreciate your consideration of this proposal, and look forward to the opportunity to work with you.

Sincerely,

Nathan Levenson
President



DISTRICT
MANAGEMENT
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Proposal
for

Tucson Unified School District

January 5th, 2015

Assessing the Effectiveness of
Learning Support Coordinators

1. Approach

School districts must tackle the twin challenges of controlling costs and improving student achievement. Fortunately, the District Management Council (DMC) has designed research approaches and methodologies that have proven effective in allowing school districts to raise student achievement, reduce costs, and improve parent satisfaction, and we have developed a team experienced in working with districts to turn strategy into results.

Each school district has a different history, student population, and systems. Our program evaluations therefore begin with gaining a deep understanding of the program being evaluated, the questions the district seeks to answer about the program, stakeholders affected by the program, and audiences who will receive and use information resulting from the evaluation.

This discovery phase is followed by on- and off-site quantitative and qualitative data collection and analysis. Based on this learning, we will identify if the program has been implemented as intended, if it has produced the desired outcomes, and provide clear recommendations to address the district's questions. Our final report will summarize our overall findings (program strengths and weaknesses, the cost/benefit analysis, etc.) and include our recommendations.

Because we know that your staff is busy, DMC's program evaluations are structured to minimize the impact on staff time and schedules while engaging them in the process. This creates positive energy and buy-in for the program evaluation.

Since the district is currently working with a Special Master, DMC will also work closely with the Special Master to ensure that the program evaluation meets external as well as internal needs.

2. Methodology

DMC has assessed the effectiveness of many specialized roles similar to LSCs through quantitative and qualitative data collection and analysis. We tailor our process to meet district needs and timelines. Our work would include:

1. Understand the intended implementation and desired outcomes of the program.

This step will involve identifying the district's most crucial questions about the program, such as:

- What problems or needs are the LSCs intended to address?
- What is the logic model behind establishing the LSC role? This can take the form of: "If the LSCs do, a, b, and c, then x, y, and z will happen."
- What is the mix of activities LSCs should be doing?
- What is the relative order of importance of the many aspects to the role?
- Which activities should be primary during a typical week?
- How might the activities change during the school year?
- How should they interact with others in the schools?

Since it is critical for any program evaluation to have a clear set of measures of success to serve as the point of comparison when evaluating, at the end of step 1 DMC will produce a written definition of success for this role. DMC will expect both the district leadership and the Special Master to approve the definition of success before proceeding further.

Because of the broad and multifaceted job description of the LSCs we anticipate that many of the measures will be activities aligned with desired and best practices, rather than specific numeric outcomes. In order to gain a deep understanding of the intended outcomes DMC will:

- Conduct focus groups with district and school leaders to gain understanding of district plan/expectations for the LSCs and perceptions on the status of current implementation.
- Conduct focus groups with LSCs to hear directly from teachers about their work.

2. Identify and obtain existing data available for the analysis

DMC will utilize existing data to help with the evaluation. This will include:

- Student achievement data by subgroup
- Achievement gap data
- Graduation rates over time and by sub group
- Fully loaded staffing costs, including average benefit costs
- Use of time data that is currently being collected
- Other available and relevant data and program costs (direct, indirect)

3. Onsite data collection to assess current practices including dmPlanning® web-based schedule sharing.

DMC will conduct detailed interviews with school leaders, LSCs and others to determine the actual role and effectiveness of LSCs compared to the desired role and outcomes.

All LSCs will also share their schedule for a week using our web-based tool dmPlanning. Through the power of web-based technology, all staff will share a typical week's schedule via an online calendar. We will not duplicate the data already collected, but will target the data collected more specifically to the key measures of success.

This data will help answer key questions, such as:

- What services are provided and are they consistent across the district?
- How much time is spent directly with students each week?
- How much time is spent on duties, paperwork, or in meetings?
- Can time be utilized differently or more efficiently and effectively?
- Are staff equitably distributed between schools given the needs of students in each building?

A Brief Overview of dmPlanning Technology

Schedule Sharing through dmPlanning

Your LSC program review includes the use of our dmPlanning schedule sharing technology that provides unprecedented insight into how staff serve children and allocate their time. Staff members will access the online tool, which will be set up by DMC. LSCs will share all their activities in a typical week.

1 Enter your typical weekly schedule 2 Tell us more 3 Save & Log out

School: Westwood Middle School Day: Monday Start time: 8 : 00 am End time: 9 : 00 am

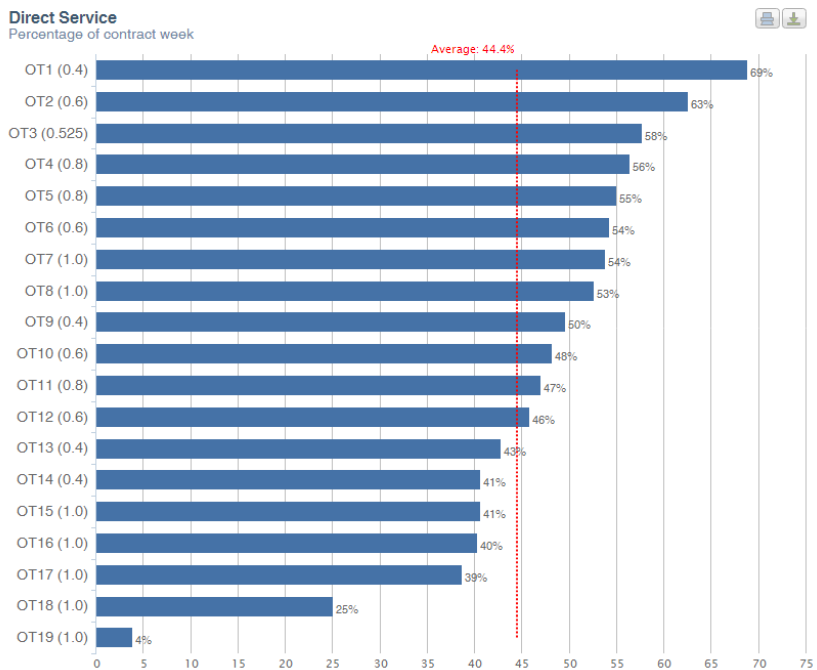
Primary activity: Direct Instruction/Support
 Setting: General education classroom Topic: Math

Monday Tuesday Wednesday Thursday Friday

Westwood Intermediate School 8:00 AM 9:00 AM

Time with Students

The tool provides great insight, such as the amount of time staff spend with students as opposed to time spent in meetings, on paperwork, and on other required tasks.



Activities During the Week

When the practitioners share their schedules, they also describe how their time is spent when not with students. The chart below is an example of the activities that a special education teacher participated in during a typical week, as well as the average amount of time spent on each different task. We will work with your staff to customize this list for LSCs.

Activity	Average Hours per Week per FTE	Percentage of Time Spent on this Activity
Direct Service		
Direct instruction/support	19h 16m	53%
Total Direct Service	19h 16m	53%
Indirect Service		
Planning preparation	2h 19m	6%
Paperwork/IEP writing	2h 13m	6%
Lunch	1h 46m	5%
Assigned school duties	1h 18m	4%
Collaboration with colleagues	1h 4m	3%
Assessments/collect assessment data	9h 36m	2%
IEP meeting	0h 22m	1%
Meeting	0h 20m	1%
Eligibility meeting	2h 20m	1%
Administering tests	2h 18m	1%
Student observation	0h 17m	1%
Travel	0h 16m	1%
Parent communication	0h 13m	1%
Professional development	0h 7m	0.3%
Colleague observation	0h 4m	0.2%
No activities reported	5h 53m	16.0%
Total Indirect Service	17h 22m	47%

4. Conduct online surveys.

In order to hear and hear honestly from all LSCs, DMC will administer an anonymous online survey inviting staff to provide their experiences, perceptions, and thoughts about the program.

The survey will elicit feedback on aspects of the program's implementation, what have been the biggest challenges, teacher training needs, or how else the program can be strengthened.

DMC will also conduct a similar survey for building administrators.

5. Analyze qualitative and quantitative data and conduct a cost-benefit analysis.

DMC will conduct a thorough analysis of all the data collected and compare actual use of time and outcomes to the intended use of time and outcomes. The analysis will also include a financial review to determine the level of investment in each of the key aspects of the LSC role.

6. Deliver report summarizing overall findings based on steps 1-5 and provide recommendations.

3. Professional Fees

DMC has determined the total cost of delivering a program evaluation of Learning Support Coordinators in the Tucson Unified School District including use of our web-based schedule sharing technology, dmPlanning. The fee is provided below. As always, DMC fees are fully inclusive of all expenses such as administrative and travel costs.

LSC Program Evaluation: \$90,000

4. DMC's Expertise

The District Management Council (DMC) was founded in 2004 to support our member districts' academic mission while improving district management and operations. We believe public schools lay the foundation for the future by sparking a desire for knowledge in young minds and a curiosity that will lead to the next generation's greatest achievements. The people who run those schools have the enormous responsibility of providing students with the optimum resources to succeed. To achieve those results, these educators must, by definition, also be great managers. DMC uses best management practices to give district leaders the tools and support they need to constantly improve student outcomes and move society forward. DMC helps educators manage for success.

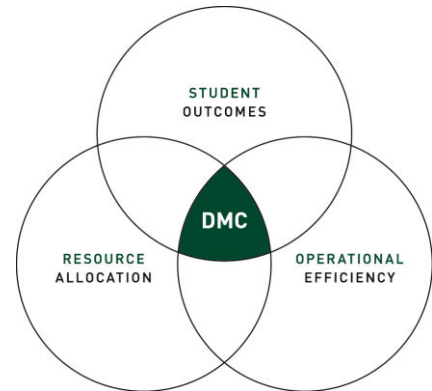
We have pioneered much of the leading edge work in program evaluation including developing practical application of Academic Return on Investment in K-12 settings, integrating cost effectiveness with student outcomes, and working with less than perfect data. We have hosted numerous conferences, published widely and worked hands on a districts to evaluate what's working and how to improve outcomes for students.

We are not just a consulting firm. DMC is the nation's premier network of public school district leaders. DMC provides superior management insights and tactical solutions to the most common and pressing challenges facing school system leaders today. We draw upon the collective wisdom of our growing membership, the veteran perspectives of our senior advisors and the analytical expertise of our management consultants.

By combining these resources, DMC provides powerful management support. Our purpose is to identify, analyze, and disseminate the best management practices for improving student achievement, enhancing operations, and reducing costs— symbolized as the DMC Mission in the graphic.

Our two senior principals have more than 50 years of combined strategic planning, program review and consulting experience. DMC has grown to be a leader in the field of K-12, with deep experience in designing and actually implementing bold, yet practical changes in school districts.

The firm and its leaders have helped create many of the current best practices in the field, as demonstrated by our numerous writings on how to raise achievement despite declining resources, helping teach aspiring superintendents, supporting the Broad and Gates foundations in their efforts, frequent speaking engagements, and advisory engagements with the U.S. Secretary of Education and his leadership team. In our consulting practice, we have worked with many dozens of school districts across the country in four primary areas of focus: strategic planning, human capital, resource allocation, and special education.



DMC Services Overview

Membership	Consulting	Technology Solutions
<p>DMC is a network of district leaders at the forefront of a national movement to make our public schools the best in the world. Today, member school districts serve more than 4.5 million students across 34 states. Membership includes:</p> <ul style="list-style-type: none"> ● Subscription to <i>The District Management Journal</i> ● Unlimited access to DMC's online library ● Registration to DMC conferences 	<p>DMC's consulting solutions are customized to meet the individual challenges and goals of our clients. We help school districts develop strategies, implement programs and practices, and ultimately, measure results. Practice areas include:</p> <ul style="list-style-type: none"> ● Strategic Planning ● Human Capital ● Special Education ● Resource Allocation ● District Turnaround 	<p>To ensure that positive change becomes lasting change, DMC has created a suite of cost-effective, web-based tools designed to improve communication, organization, and performance. By utilizing this infrastructure to sustain best management practices, districts can focus on staffing, district goals, and teacher development. DMC provides the following technology solutions:</p> <ul style="list-style-type: none"> ● dmDashboard® ● dmStaffing® ● dmPlanning®

About DMC Consulting

We draw upon the best research across the education, business, government, and non-profit sectors and combine it with practical experience from the work we have done in member districts nationwide. Our approach is customized to the unique circumstances, needs, and objectives of each of our client districts. In our consulting practice, we have worked with dozens of school districts across the country in four primary areas of focus:

- **Strategic Planning:** Strategic planning helps districts reach long-term goals by setting priorities based on a district's theory of action. DMC focuses on district-level strategy, superintendent entry plans, and school improvement plans that jump-start a school's turnaround.
- **Human Capital:** DMC helps districts bring out the best in people. We help identify, recruit, cultivate, and retain the most talented teachers and staff while using tools such as Teacher and Principal Evaluation, Succession Planning, Differentiated Pay, Leadership Development, and Career Development.
- **Resource Allocation:** Maintaining and improving district performance is dependent on the smart and strategic allocation of resources. DMC guides districts through staffing strategies, budget redesign, weighted student funding, outcomes-based resource allocation, and the reconciling of budget and strategy.

- **Special Education:** DMC is dedicated to improving the lives and education of students with special needs while reducing the strain on school budgets. Specific emphasis is placed on reading instruction and intervention, roles of paraprofessionals, best practice service delivery models and scheduling and staffing tools.

DMC's Consulting practice differs from many others in that we are hands-on. DMC partners with districts to put into practice the plans and solutions we developed together. We do not just present our clients reports and then walk away. The implementation phase of our work ensures that the strategic vision is fully realized by providing on-the-ground project management, change management, capacity building assistance, and integration of customized technology and tools.

About DMC Technology Solutions

DMC has developed a suite of custom technology solutions for school districts, which we frequently implement as part of our consulting engagements. These cost-effective, web-based tools are designed to improve communication, organization, and performance in your district. These technology solutions can help ensure that positive change becomes lasting change.

About DMC Membership

DMC is also a network of district leaders at the forefront of a national movement to make our public schools the best in the world. Today, member school districts serve more than 4.5 million students across 34 states.

DMC members have access to DMC conferences, the DMC resource library, and have access to the network of like-minded, forward-thinking leaders.

Team Member Credentials

The District Management Council has been providing research and consulting services to superintendents and public school districts for over ten years. The firm and its consultants are considered leaders in program evaluation and best practices, bringing a portfolio of effective and cost-effective practices to every project.

The work outlined in this proposal will be led by Nathan Levenson and a team of full-time staff from The District Management Council. The team will also be aided by our board of senior advisors; DMC senior advisors are a source of cutting-edge thinking, have demonstrated success in the field, and have a national perspective on what's working well in education. This project will also be supported by our research staff, data analysts, and administrative support team members. The team for your project will include the following team members:

Nathan Levenson, President



Nathan's experience as a superintendent, school board member, and private sector CEO allows him to bring a unique perspective to his work at DMC. As President, he oversees all consulting activities and directs the development of tools and systems to facilitate the implementation of best practices. Nate works closely with superintendents and their leadership teams to create practical solutions to pressing challenges and to guide sustained efforts that turn opportunities into realities.

DMC Project Experiences Include:

- Leading a redesign of special education in a mid-sized district that started with an in-depth study of both general and special education services. A short list of high-leverage opportunities was developed, and a multi-year implementation effort resulted in improved academic support for students as well as annual savings exceeding \$3,000,000.
- Directing a strategic planning effort to ensure all students master 21st century skills despite declining resources. The inclusive process included prioritizing and reducing initiatives and aligning time and money to their strategy. The process concluded with the development of measurable outcomes and an accountability system.
- Developing a software tool that allows district leaders to explore the achievement, political, and financial impact of various resource allocation strategies. The tool provides a safe environment to explore a district's priorities, philosophies, and options for resource allocation.

Other Professional Experiences Include:

- Superintendent, Arlington, MA. Working with a very talented team, the district reduced the number of students reading below grade level by 65% and decreased the special education achievement gap by 66%. Some schools were commended by Rennie Center for Education Research and Policy, by the National Blue Ribbon Schools program, by the MA DOE Compass Schools program and by School Matters—all for outperforming schools in like communities.
- CEO North American Industries, an engineering and manufacturing company.

Publications Include:

- Contributing author, *Spending Money Wisely*, The District Management Council, 2014.
- *Smarter Budgets, Smarter Schools: How to survive and thrive in tight times*, Harvard Education Press, 2012.
- Contributing author, *Stretching the School Dollar*, Harvard Education Press 2010.
- "Something Must Change: Rethinking Special Education," American Enterprise Institute, 2011.
- "Declining Resources, Targeted Strategies," *School Administrator Magazine*, January 2011.
- "Doing the most good: Academic Return on Investment," *Educational Leadership*, 2012.

Education:

- BA from Dartmouth College
- MBA with distinction from Harvard Business School
- Graduate of the Broad Foundation Urban Superintendents Academy

Boards:

- Former Chair, Boxford, MA School Board
- Former Vice President, Merrimack Valley Habitat for Humanity
- Former UNCF, North East Region supporting African American students attending college

Mark Wiernusz, Senior Director



Mark brings to DMC a combination of strategic management consulting and leadership experience. As Senior Director, Mark leads consulting projects across several practice areas including strategic planning and human capital. In these projects, he works closely with district leadership teams to implement best practices and drive continuous improvement.

Representative Project Experiences Include:

- Working with a 55,000 student district to implement a rigorous process in identifying school success intended to improve school performance and foster alignment to district goals.
- Assisting a large urban school district to develop a comprehensive Human Capital strategy that ensures all schools are staffed with highly effective teachers.
- Performing a financial implication study to assess impact of teacher enrollment and participation in state pension programs.
- Assisting a tech start-up to launch a biofeedback learning software to help K-12 students with learning disabilities.
- Developing an international growth strategy for a premier pre K-12 private school.

Other Professional Experiences Include:

- Senior Engagement Manager for L.E.K. Consulting, a global strategic management consulting firm, managing engagements across a wide variety of industries and practice areas, including strategic planning, commercialization strategy development, and change management.
- Captain (U.S. Army) and helicopter aviator (Pilot-In-Command) where Mark's responsibilities included serving as training officer for a 2,000+ member aviation brigade and planning and executing joint air-to-ground urban combat operations during Operation Iraqi Freedom.

Education:

- BS in Engineering Management from West Point (United States Military Academy)
- MBA from the Wharton School of Business

Dr. Wallis Raemer, Senior Associate



Dr. Raemer is a Senior Associate at The District Management Council providing direct support for consulting engagements. Previously, Dr. Raemer served as Interim Assistant Superintendent of the Arlington, Massachusetts's schools as well as an elementary principal there. During her tenure in Arlington, Dr. Raemer led a number of improvement initiatives including district wide technology planning, using data to inform instruction in professional learning communities, common core alignment, and the implementation of a comprehensive K-7 reading intervention program.

Professional Experiences Include:

- She currently mentors school principals and is a workshop leader for the EDCO Collaborative, which has a long history of providing high quality professional development to school districts in the Greater Boston area and across Massachusetts. Her most recent workshop offering is on “good-judgment” feedback conversations.

Education:

- Ph.D. in School Leadership, Boston College, where her research focus was the reorganization of special education services and the change process
- Master's degree in Educational Counseling, Boston University
- Began her career in education as a teacher of social studies in grades 5-7 and was a K-8 guidance counselor and special education team leader for twenty years

Adam Hogue, Associate



Adam brings to DMC a background in social science research and a deep interest in the education sector. At DMC, he works with districts to improve the quality of education they provide to their students through his skills in analytical research and project management.

DMC Project Experience Includes:

- Developing an academic return on investment (A-ROI) guide that is currently supporting multiple districts as they develop A-ROI capacity and begin conducting analyses on the cost-effectiveness of their efforts.
- Collaborating with the leadership team in a turnaround district to develop and implement a strategic plan to build capacity of key teams, strengthen district-wide systems, and increase student outcomes.
- Partnering with an urban district to build the management acumen of school-based administrators through monthly training sessions on resource allocation and change management.
- Working with a suburban district to identify opportunities to increase the effectiveness and equity of the academic and social-emotional services provided to students at the middle school level.
- Helping a district with over \$400 million in revenues reorganize its budget document to promote greater transparency for the public and to increase the document's efficacy as a management tool for district leaders.

Other Professional Experience:

- Summer Foundations Coordinator at New Leaders, where he organized the summer training program for two cohorts of aspiring urban principals.
- Public Policy Fellow at a commercial solar energy development firm where he developed a proprietary tool for project management and financial analysis of incoming projects.

Education:

- AB in Government from Harvard College.