

COVER SHEET – AGENDA ITEM #R2

For Commission Meeting: June 15, 2015

“Evaluation Services Contract for MHCRC Grants in Public Education: Pacific Research & Evaluation, LLC”

Recommendation

Staff recommends that the Commission approve the professional services contract for evaluation consultant services for MHCRC’s TechSmart Initiative with Pacific Research & Evaluation, LLC (attached).

Background

As you may recall, the MHCRC staff issued a Request for Proposals (RFP) in early April to solicit proposals from firms or teams with demonstrated experience and expertise to design and implement an evaluation plan for the MHCRC’s TechSmart Initiative for Student Success (“TechSmart Initiative”) in order to better understand the impact of its grant investments within Multnomah County, OR, on improving K-12 student achievement and closing the achievement gap.

The MHCRC anticipates that the TechSmart evaluation will:

- Show impact over time of MHCRC TechSmart Initiative investments.
- Deploy evaluation techniques that ensure the evaluation information and data obtained from individual school district projects can be used to validate teaching practices and strategies that advance student success and close the achievement gap.
- Enable the school districts and the MHCRC staff to continually reflect on and evaluate stages of a school district’s development on factors central to comprehensive systems change, which are also foundational for successful technology adoption.
- Provide guidance to the MHCRC and its partner school districts for further strategic investments in effective instruction.

The RFP Evaluation Panel selected Pacific Research & Evaluation, LLC, and staff negotiated a contract with firm (attached). The MHCRC Legal Counsel, Ben Walters, has also reviewed the contract.

The MHCRC’s budget FY14-15 (\$27,000) and FY15-16 (\$40,000) includes funds for this work. Staff anticipates that the FY16-17 will contain the remaining \$30,000. The work is divided into two phases as follows: Phase I - Up to \$27,000 for development of the evaluation plan - by September 30, 2015; and Phase II - Up to \$70,000 for implementation of the evaluation plan through July 31, 2017.

Attachments: Evaluation Services Contract with Pacific Research & Evaluation, LLC (draft)

Submitted by: Julie S. Omelchuck
June 10, 2015

**MT. HOOD CABLE REGULATORY COMMISSION
AGREEMENT FOR PROFESSIONAL SERVICES**

CONTRACT NUMBER [Click Here and Type](#)

**TITLE OF WORK PROJECT
Evaluation Services for MHCRC Grants in Public Education**

This contract is between the Mt. Hood Cable Regulatory Commission ("Commission" and Pacific Research and Evaluation, LLC, hereafter called Consultant. The Commission's Project Manager for this contract is Julie S. Omelchuck.

Effective Date and Duration

This contract shall become effective on June 16, 2015. This contract shall expire, unless otherwise terminated or extended, on July 31, 2017.

Consideration

- (a) Commission agrees to pay Consultant a sum not to exceed \$27,000 for Phase I accomplishment of the work and a sum not to exceed \$70,000 for Phase II accomplishment of the work for a total not to exceed amount of \$97,000.
- (b) Interim payments shall be made to Consultant according to the schedule identified in the STATEMENT OF THE WORK AND PAYMENT SCHEDULE.

=====

CONSULTANT DATA AND CERTIFICATION

Name (print full legal name): Pacific Research & Evaluation, LLC

Address: 3507 SW Corbett Ave., Portland, OR 97239

Employer Identification Number (EIN): _____
[INDEPENDENT CONTRACTORS: DO NOT PROVIDE SOCIAL SECURITY NUMBER (SSN) – LEAVE BLANK IF NO EIN]

City of Portland Business Tax Registration Number: 688696

- Citizenship: Nonresident alien Yes No
- Business Designation (check one): Individual Sole Proprietorship Partnership Corporation
- Limited Liability Co (LLC) Estate/Trust Public Service Corp. Government/Nonprofit

Payment information will be reported to the IRS under the name and taxpayer I.D. number provided above. Information must be provided prior to contract approval.

=====

TERMS AND CONDITIONS

1. Standard of Care

Consultant shall perform all services under this contract using that care, skill, and diligence that would ordinarily be used by similar professionals in this community in similar circumstances.

2. Effect of Expiration

Passage of the contract expiration date shall not extinguish, prejudice, or limit either party's right to enforce this Contract with respect to any default or defect in performance that has not been corrected.

3. Order of Precedence

This contract consists of these Terms and Conditions, the Statement of Work and Payment Schedule, and any exhibits that are attached. Any apparent or alleged conflict between these items will be resolved by using the following order of precedence:

- a) these Terms and Conditions; b) Statement of Work and Payment Schedule; and c) any exhibits attached to the contract.

4. Early Termination of Contract

- (a) The Commission may terminate this Contract for convenience at any time for any reason deemed appropriate in its sole discretion. Termination is effective immediately upon notice of termination given by the Commission.
- (b) Either party may terminate this Contract in the event of a material breach by the other party that is not cured. Before termination is permitted, the party seeking termination shall give the other party written notice of the breach, its intent to

terminate, and fifteen (15) calendar days to cure the breach. If the breach is not cured within 15 days, the party seeking termination may terminate immediately by giving written notice that the Contract is terminated.

5. Remedies and Payment on Early Termination

- (a) If the Commission terminates pursuant to 4(a) above, the Commission shall pay the Consultant for work performed in accordance with the Contract prior to the termination date. No other costs or loss of anticipated profits shall be paid.
- (b) If the Commission terminates pursuant to 4(b) above, the Commission is entitled all remedies available at law or equity. In addition, Consultant shall pay the Commission all damages, costs, and sums incurred by the Commission as a result of the breach.
- (c) If the Consultant justifiably terminates the contract pursuant to subsection 4(b), the Consultant's only remedy is payment for work prior to the termination. No other costs or loss of anticipated profits shall be paid.
- (d) If the Commission's termination under Section 4(b) was wrongful, the termination shall be automatically converted to one for convenience and the Consultant shall be paid as if the Contract was terminated under Section 4(a).
- (e) In the event of early termination the Consultant's work product before the date of termination becomes property of the Commission.

6. Assignment

Consultant shall not subcontract, assign, or transfer any of the work scheduled under this agreement, without the prior written consent of the Commission. Notwithstanding Commission approval of a subconsultant, the Consultant shall remain obligated for full performance hereunder, and the Commission shall incur no obligation other than its obligations to the Consultant hereunder. The Consultant agrees that if subconsultants are employed in the performance of this Agreement, the Consultant and its subconsultants are subject to the requirements and sanctions of ORS Chapter 656, Workers' Compensation.

7. Compliance with Applicable Law

Consultant shall comply with all applicable federal, state, and local laws and regulations. Consultant agrees it currently is in compliance with all tax laws. Consultant shall comply with Title VI of the Civil Rights Act of 1964 and its corresponding regulations as further described at: <http://www.portlandoregon.gov/bibs/article/446806>.

8. Indemnification for Property Damage and Personal Injury

Consultant shall indemnify, defend, and hold harmless the Commission, its officers, agents, and employees, from all claims, losses, damages, and costs (including reasonable attorney fees) for personal injury and property damage arising out of the intentional or negligent acts or omissions of the Consultant, its Subconsultants, suppliers, employees or agents in the performance of its services. Nothing in this paragraph requires the Consultant or its insurer to indemnify the Commission for claims of personal injury or property damage caused by the negligence of the Commission. This duty shall survive the expiration or termination of this contract.

9. Insurance

Consultant shall obtain and maintain in full force at Consultant expense, throughout the duration of the Contract and any warranty or extension periods, the required insurance identified below. The Commission reserves the right to require additional insurance coverage as required by statutory or legal changes to the maximum liability that may be imposed on Oregon cities and/or other affected jurisdictions during the term of the Contract.

- (a) Workers' compensation insurance as required by ORS Chapter 656 and as it may be amended. Unless exempt under ORS Chapter 656, the Consultant and all subconsultants shall maintain coverage for all subject workers.

X Required and attached // Proof of exemption (i.e., completion of Workers' Compensation Insurance Statement)

- (b) General commercial liability (CGL) insurance covering bodily injury, personal injury, property damage, including coverage for independent contractor's protection (required if any work will be subcontracted), premises/operations, contractual liability, products and completed operations, in per occurrence limit of not less than \$1,000,000, and aggregate limit of not less than \$2,000,000.

X Required and attached // Waived by Director or designee // Reduce by Director or designee

- (c) Automobile liability insurance with coverage of not less than \$1,000,000 each accident, and an umbrella or excess liability coverage of \$2,000,000. The insurance shall include coverage for any auto or all owned, scheduled, hired and non-owned auto. This coverage may be combined with the commercial general liability insurance policy.

X Required and attached // Waived by Director or designee // Reduce by Director or designee

- (d) Professional Liability and/or Errors & Omissions insurance to cover damages caused by negligent acts, errors or omissions related to the professional services, and performance of duties and responsibilities of the Consultant under this contract in an amount with a combined single limit of not less than \$1,000,000 per occurrence and aggregate of \$3,000,000 for all claims per occurrence. In lieu of an occurrence based policy, Consultant may have claims-made policy in an amount not less than \$1,000,000 per claim and \$3,000,000 annual aggregate, if the Consultant obtains an extended reporting period or tail coverage for not less than three (3) years following the termination or expiration of the Contract.

Required and attached // X Waived by Director or designee // Reduce by Director or designee

Continuous Coverage; Notice of Cancellation: The Consultant agrees to maintain continuous, uninterrupted coverage for the duration of the Contract. There shall be no termination, cancellation, material change, potential exhaustion of aggregate limits or non renewal of coverage without thirty (30) days written notice from Consultant to the Commission. If the insurance is canceled or terminated prior to completion of the Contract, Consultant shall immediately notify the Commission and provide a new policy with the same terms. Any failure to comply with this clause shall constitute a material breach of Contract and shall be grounds for immediate termination of this Contract.

Additional Insured: The liability insurance coverages, except Professional Liability, Errors and Omissions, or Workers' Compensation, shall be without prejudice to coverage otherwise existing, and shall name the Commission and its officers, agents and employees as Additional Insureds, with respect to the Consultant's activities to be performed, or products or services to be provided. Coverage shall be primary and non-contributory with any other insurance and self-insurance. Notwithstanding the naming of additional insureds, the insurance shall protect each additional insured in the same manner as though a separate policy had been issued to each, but nothing herein shall operate to increase the insurer's liability as set forth elsewhere in the policy beyond the amount or amounts for which the insurer would have been liable if only one person or interest had been named as insured.

Certificate(s) of Insurance: Consultant shall provide proof of insurance through acceptable certificate(s) of insurance, including additional insured endorsement form(s) and all other relevant endorsements, to the Commission prior to the award of the Contract if required by the procurement documents (e.g., request for proposal), or at execution of Contract and prior to any commencement of work or delivery of goods or services under the Contract. The Certificate(s) will specify all of the parties who are endorsed on the policy as Additional Insureds (or Loss Payees). Insurance coverages required under this Contract shall be obtained from insurance companies acceptable to the Commission of Portland. The Consultant shall pay for all deductibles and premium. The Commission reserves the right to require, at any time, complete, certified copies of required insurance policies, including endorsements evidencing the coverage the required.

Subconsultant(s): Consultant shall provide evidence that any subconsultant, if any, performing work or providing goods or service under the Contract has the same types and amounts of coverages as required herein or that the subconsultant is included under Consultant's policy.

10. Ownership of Work Product

All work product produced by the Consultant under this contract is the exclusive property of the Commission. "Work Product" includes, but is not limited to: research, reports, computer programs, manuals, drawings, recordings, photographs, artwork and any data or information in any form. The Consultant and the Commission intend that such Work Product shall be deemed "work made for hire" of which the Commission shall be deemed the author. If for any reason a Work Product is deemed not to be a "work made for hire," the Consultant hereby irrevocably assigns and transfers to the Commission all right, title and interest in such work product, whether arising from copyright, patent, trademark, trade secret, or any other state or federal intellectual property law or doctrines. Consultant shall obtain such interests and execute all documents necessary to fully vest such rights in the Commission. Consultant waives all rights relating to work product, including any rights arising under 17 USC 106A, or any other rights of authorship, identification or approval, restriction or limitation on use or subsequent modifications. If the Consultant is an architect, the Work Product is the property of the Consultant-Architect, and by execution of this contract, the Consultant-Architect grants the Commission an exclusive and irrevocable license to use that Work Product.

Notwithstanding the above, all pre-existing trademarks, services marks, patents, copyrights, trade secrets, and other proprietary rights of Consultant are and will remain the exclusive property of Consultant.

11. EEO Certification

In the event Consultant provides in excess of \$2,500.00 for services to the Commission in any fiscal year, Consultant shall obtain EEO certification from the City of Portland.

12. Equal Benefits

Consultant must comply with the City's Equal Benefits program as prescribed by Chapter 3.100 of the Code of the City of Portland. The required documentation must be filed with Procurement Services, City of Portland, prior to contract execution.

13. Successors in Interest

The provisions of this contract shall be binding upon and shall inure to the benefit of the parties hereto, and their respective successors and approved assigns.

14. Severability

The parties agree that if any term or provision of this contract is declared by a court of competent jurisdiction to be illegal or in conflict with any law, the validity of the remaining terms and provisions shall not be affected, and the rights and obligations of the parties shall be construed and enforced as if the contract did not contain the particular term or provision held to be invalid.

15. Waiver

The failure of the Commission to enforce any provision of this contract shall not constitute a waiver by the Commission of that or any other provision.

16. Errors

The Consultant shall promptly perform such additional services as may be necessary to correct errors in the services required by this contract without undue delays and without additional cost.

17. Governing Law/Venue

The provisions of this contract shall be interpreted, construed and enforced in accordance with, and governed by, the laws of the State of Oregon without reference to its conflict of laws provisions that might otherwise require the application of the law of any other jurisdiction. Any action or suits involving any question arising under this contract must be brought in the appropriate court in Multnomah County Oregon.

18. Amendments

All changes to this contract, including changes to the scope of work and contract amount, must be made by written amendment and approved by the Commission to be valid. Any amendment that increases the original contract amount by more than 25% must be approved by the Commission to be valid.

19. Business Tax Registration

The Consultant shall obtain a City of Portland business tax registration number as required by Portland City Code 7.02 prior to beginning work under this Contract.

20. Prohibited Conduct

The Consultant shall not hire any Commission employee who evaluated the proposals or authorized the award of this Contract for two years after the date the contract was authorized without the express written permission of the Commission and provided the hiring is permitted by state law.

21. Payment to Vendors and Subconsultants

The Consultant shall timely pay all subconsultants and suppliers providing services or goods for this Contract.

22. Access to Records

The Consultant shall maintain all records relating to this Contract for three (3) years after final payment. The Commission may examine, audit and copy the Consultant’s books, documents, papers, and records relating to this contract at any time during this period upon reasonable notice. Copies of these records shall be made available upon request. Payment for the reasonable cost of requested copies shall be made by the Commission.

23. Audits

- (a) The Commission may conduct financial and performance audits of the billings and services specified in this agreement at any time in the course of the agreement and during the three (3) year period established by paragraph 22. Audits will be conducted in accordance with generally accepted auditing standards as promulgated in Government Auditing Standards by the Comptroller General of the United States Government Accountability Office.
- (b) If an audit discloses that payments to the Consultant exceed the amount to which the Consultant was entitled, the Consultant shall repay the amount of the excess to the Commission.

24. Electronic Signatures

The Commission and Consultant may conduct this transaction, including any contract amendments, by electronic means, including the use of electronic signatures.

25. Merger Clause

This Contract encompasses the entire agreement of the parties, and supersedes all previous understandings and agreements between the parties, whether verbal or written.

26. Dispute Resolution/Work Regardless of Disputes

The parties shall participate in mediation to resolve disputes before conducting litigation. The mediation shall occur at a reasonable time after the conclusion of the Contract with a mediator jointly selected by the parties. Notwithstanding any dispute under this Contract, the Consultant shall continue to perform its work pending resolution of a dispute, and the Commission shall make payments as required by the Contract for undisputed portions of the work. In the event of litigation no attorney fees are recoverable. No different dispute resolution paragraph(s) in this contract or any attachment hereto shall supersede or take precedence over this provision.

27. Progress Reports: / Applicable /X Not Applicable

If applicable, the Consultant shall provide monthly progress reports to the Project Manager as described in the Statement of the Work and Payment Schedule.

28. Consultant's Personnel: /X Applicable / Not Applicable

If applicable, the Consultant shall assign the personnel listed in the Statement of the Work and Payment Schedule for the work required by the Contract and shall not change personnel without the prior written consent of the Commission, which shall not be unreasonably withheld.

29. Subconsultants

The Consultant shall use the subconsultants identified in its proposals. The Consultant shall not change subconsultant assignments without the prior written consent of the Chief Procurement Officer of the City of Portland. The Commission will enforce all social equity contracting and Minority, Women and Emerging Small Business (M/W/ESB) subcontracting commitments submitted by the Consultant in its proposals. Failure to use the identified M/W/ESB subconsultants without prior written consent is a material breach of contract.

For contracts valued \$50,000 or more, the Consultant shall submit a Monthly Subconsultant Payment and Utilization Report (MUR), made part of this contract by reference, reporting ALL subconsultants employed in the performance of this agreement. An electronic copy of the MUR may be obtained at: <http://www.portlandoregon.gov/bibs/45475>.

30. Third Party Beneficiaries

There are no third party beneficiaries to this contract. Enforcement of this contract is reserved to the parties.

31. Conflict of Interest

Consultant hereby certifies that, if applicable, its contract proposal is made in good faith without fraud, collusion or connection of any kind with any other proposer of the same request for proposals or other Commission procurement solicitation(s), that the Consultant as a proposer has competed solely on its own behalf without connection or obligation to, any undisclosed person or firm. Consultant certifies that it is not a Commission official/employee or a business with which a Commission official/employee is associated, and that to the best of its knowledge, Consultant, its employee(s), its officer(s) or its director(s) is not a Commission official/employee or a relative of any Commission official/employee who: i) has responsibility in making decisions or ability to influence decision-making on the contract or project to which this contract pertains; ii) has or will participate in evaluation or management of the contract; or iii) has or will have financial benefits in the contract. Consultant understands that should it elect to employ any former Commission official/employee during the term of the contract then that the former Commission official/Consultant employee must comply with applicable government ethics and conflicts of interest provisions in ORS Chapter 244, including but not limited to ORS 244.040(5) and ORS 244.047, and the Commission’s Charter, Codes and administrative rules, including lobbying prohibitions under Portland City Code Section 2.12.080.

=====

**STATEMENT OF THE WORK
AND PAYMENT SCHEDULE**

SCOPE OF WORK

On May 1, 2015, the Consultant submitted a proposal for evaluation services for MHCRC Grants in Public Education in response to a Request for Proposals issued by the Commission. A copy of the Consultant’s proposal is attached to this contract as Attachment 1. Except as otherwise specifically addressed in this contract, the deliverables and schedule for this project shall be as described in pages 14 through 20 of Attachment 1.

Phase I: The Consultant shall complete the following deliverables on or before September 30, 2015:

- a. Finalize a TechSmart Initiative logic model in collaboration with MHCRC staff and partner school districts.
- b. Design a TechSmart evaluation plan, including a detailed implementation workplan and timeline, aligned to the TechSmart logic model, which is sustainable from MHCRC resources for multiple years.
- c. Conduct analysis of current data collection methods and tools used by the school districts to determine and identify usefulness in integrating into TechSmart evaluation.
- d. Consult with partner school districts to ensure their grant project evaluations align with the TechSmart logic model.
- e. Identify evaluation data that can be obtained through the MHCRC Grants Management System.

Phase II: The Consultant shall conduct the following deliverables through July 31, 2017:

- a. Conduct the TechSmart evaluation in accordance with the workplan and timeline established under completion of Phase I deliverables above.
- b. Work cooperatively with Portland State University staff on analysis of student level data from the partner school districts related to grant funded projects.
- c. Analyze data received, including trend analysis.
- d. Document the evaluation process.
- e. Prepare and present evaluation reports about activities, data analysis and findings.
- f. Consult with partner school districts to ensure their grant project evaluations align with the TechSmart logic model.

CONSULTANT PERSONNEL

The Consultant shall assign the following personnel to do the work in the capacities designated:

NAME	ROLE ON PROJECT
Steven Rider	Primary Investigator
Kristi Manseth	Project Manager
Julie Murphy	Consultation and research

Regina Wheeler	Data collection, analysis and reporting
Lindy Wortman	Data cleaning and reporting
Sarah Campbell	Research

SUBCONSULTANTS

The Consultant shall assign the following subconsultants to perform work in the capacities designated:

NAME	ROLE ON PROJECT	SUBCONTRACT AMOUNT
Kristina Smock	Conduct Interviews, analysis and reporting	\$9,600.00

The Commission will enforce all social equity contracting and Minority, Women and Emerging Small Business (M/W/ESB) subcontracting commitments submitted by the Consultant in its Proposal. For contracts valued \$50,000 or more, the Consultant shall submit a Monthly Subconsultant Payment and Utilization Report (MUR), made part of this contract by reference, reporting ALL subconsultants employed in the performance of this agreement. An electronic copy of the MUR may be obtained at: <http://www.portlandoregon.gov/bibs/45475>.

COMPENSATION

The maximum that the Consultant can be paid on this contract is \$97,000.00 (hereafter the “not to exceed” amount.). The “not to exceed” amount includes all payments to be made pursuant to this contract, including reimbursable expenses, if any. Nothing in this contract requires the Commission to pay for work that does not meet the Standard of Care or other requirements of the Contract. The actual amount to be paid Consultant may be less than that amount.

The Consultant is entitled to receive progress payments for its work pursuant to the Contract as provided in more detail below. The Commission will pay Consultant based on these invoices for acceptable work performed and approved until the “not to exceed” amount is reached. Thereafter, Consultant must complete work based on the Contract without additional compensation unless there is a change to the scope of work. It is Commission policy to pay its vendor invoices via electronic funds transfers through the automated clearing house (ACH) network. To initiate payment of invoices, vendors shall execute the Commission’s standard ACH Vendor Payment Authorization Agreement. Upon verification of the data provided, the Payment Authorization Agreement will authorize the Commission to deposit payment for services rendered or goods provided directly into vendor accounts with financial institutions. All payments shall be in United States currency.

Any estimate of the hours necessary to perform the work is not binding on the Commission. The Consultant remains responsible if the estimate proves to be incorrect. Exceeding the number of estimated hours of work does not impose any liability on the Commission for additional payment.

If work is completed before the “not to exceed” amount is reached, the Consultant’s compensation will be based on the Consultant’s bills previously submitted for acceptable work performed and approved.

PAYMENT TERMS: Net 30 Days

Hourly Rates

The billing rates shall not exceed those set forth in Attachment 1, page 22.

Progress Payments

On or before the 15th of each month, the Consultant shall submit to the Commission’s Project Manager an invoice for work performed by the Consultant during the preceding month. The invoice shall contain the Commission’s Contract Number and set out all items for payment including, but not limited to: the name of the individual, labor category, direct labor rate, hours worked during the period, and tasks performed. The Consultant shall also attach photocopies of claimed reimbursable expenses, if applicable. The Consultant shall stamp and approve all subconsultant invoices and note on the subconsultant invoice what they are approving as “billable” under the contract. The billing from the prime should clearly roll up labor and reimbursable costs for the prime and subconsultants – matching the subconsultant invoices. The invoice shall be on Consultant’s letterhead, signed and dated by an authorized representative of PRE and addressed to Julius S. Omelchuck, MHCRC c/o City of Portland.

The Commission shall pay all amounts to which no dispute exists within 30 days of receipt of the invoice. Payment of any bill, however, does not preclude the Commission from later determining that an error in payment was made and from withholding the disputed sum from the next progress payment until the dispute is resolved.

The Consultant shall make full payment to its subconsultants within 10 business days following receipt of any payment made by the Commission to Consultant.

ACH Payments

It is the Commission's policy to pay its Consultant invoices via electronic funds transfers through the automated clearing house (ACH) network. To initiate payment of invoices, Consultants shall execute the Commission's standard ACH Vendor Payment Authorization Agreement which is available on the Commission's website at: <http://www.portlandoregon.gov/bfs/article/409834>.

Upon verification of the data provided, the Payment Authorization Agreement will authorize the Commission to deposit payment for services rendered directly into Consultant accounts with financial institutions. All payments shall be in United States currency.

WORKERS' COMPENSATION INSURANCE STATEMENT

IF YOUR FIRM HAS CURRENT WORKERS' COMPENSATION INSURANCE, CONTRACTOR MUST SIGN HERE:

I, undersigned, am authorized to act on behalf of entity designated below, and I hereby certify that this entity has current Workers' Compensation Insurance.

Contractor Signature: _____ Date: _____ Entity: _____

IF YOUR FIRM DOES NOT HAVE CURRENT WORKERS' COMPENSATION INSURANCE, CONTRACTOR MUST COMPLETE THE FOLLOWING INDEPENDENT CONTRACTOR CERTIFICATION STATEMENT:

As an independent contractor, I certify that I meet the following standards:

1. The individual or business entity providing labor or services is registered under ORS Chapter 701, if the individual or business entity provides labor or services for which such registration is required;
2. Federal and state income tax returns in the name of the business or a business Schedule C or form Schedule F as part of the personal income tax return were filed for the previous year if the individual or business entity performed labor or services as an independent contractor in the previous year; and
3. The individual or business entity represents to the public that the labor or services are to be provided by an independently established business. Except when an individual or business entity files a Schedule F as part of the personal income tax returns and the individual or business entity performs farm labor or services that are reportable on Schedule C, an individual or business entity is considered to be engaged in an independently established business when four or more of the following circumstances exist. Contractor: check four or more of the following:

- _____ A. The labor or services are primarily carried out at a location that is separate from the residence of an individual who performs the labor or services, or are primarily carried out in a specific portion of the residence, which portion is set aside as the location of the business;
- _____ B. Commercial advertising or business cards as is customary in operating similar businesses are purchased for the business, or the individual or business entity has a trade association membership;
- _____ C. Telephone listing and service are used for the business that is separate from the personal residence listing and service used by an individual who performs the labor or services;
- _____ D. Labor or services are performed only pursuant to written contracts;
- _____ E. Labor or services are performed for two or more different persons within a period of one year; or
- _____ F. The individual or business entity assumes financial responsibility for defective workmanship or for service not provided as evidenced by the ownership of performance bonds, warranties, errors and omission insurance or liability insurance relating to the labor or services to be provided.

Contractor Signature

Date

FOR COMMISSION USE ONLY

PROJECT MANAGER-COMplete ONLY IF CONTRACTOR DOES NOT HAVE WORKER'S COMPENSATION INSURANCE
ORS 670.600 Independent contractor standards. As used in various provisions of ORS Chapters 316, 656, 657, and 701, an individual or business entity that performs labor or services for remuneration shall be considered to perform the labor or services as an "independent contractor" if the standards of this section are met. The contracted work meets the following standards:

1. The individual or business entity providing the labor or services is free from direction and control over the means and manner of providing the labor or services, subject only to the right of the person for whom the labor or services are provided to specify the desired results;
2. The individual or business entity providing labor or services is responsible for obtaining all assumed business registrations or professional occupation licenses required by state law or local government ordinances for the individual or business entity to conduct the business;
3. The individual or business entity providing labor or services furnishes the tools or equipment necessary for performance of the contracted labor or services;
4. The individual or business entity providing labor or services has the authority to hire and fire employees to perform the labor or services;
5. Payment for the labor or services is made upon completion of the performance of specific portions of the project or is made on the basis of an annual or periodic retainer.

Commission Project Manager Signature

Date

CONSULTANT SIGNATURE:

This contract may be signed in two (2) or more counterparts, each of which shall be deemed an original, and which, when taken together, shall constitute one and the same Agreement.

The parties agree the Commission and Consultant may conduct this transaction, including any contract amendments, by electronic means, including the use of electronic signatures.

I, the undersigned, agree to perform work outlined in this contract in accordance to the STANDARD CONTRACT PROVISIONS, the terms and conditions, made part of this contract by reference, and the STATEMENT OF THE WORK made part of this contract by reference; hereby certify under penalty of perjury that I/my business am not/is not in violation of any Oregon tax laws; hereby certify that my business is certified as an Equal Employment Opportunity Affirmative Action Employer and is in compliance with the Equal Benefits Program as prescribed by Chapter 3.100 of Code of the Commission of Portland; and hereby certify I am an independent contractor as defined in ORS 670.600.

Pacific Research & Evaluation, LLC

BY: _____ Date: _____

Name: _____

Title: _____

CONTRACT NUMBER: _____

CONTRACT TITLE: **Evaluation Services for MHCRC Grants in Public Education**

MT. HOOD CABLE REGULATORY COMMISSION:

By: _____
Chair

Date: _____

Approved as to Form:

By: _____
MHCRC Legal Counsel

Date: _____



PACIFIC
Research & Evaluation, LLC

Mt. Hood Cable Regulatory Commission
Proposal for Evaluation Services for MHCRC Grants in
Public Education

Submitted by
Steven Rider, Ph.D.
President
Pacific Research & Evaluation, LLC



PACIFIC
Research & Evaluation, LLC

3507 SW Corbett Avenue ♦ Portland, OR. 97239 ♦ 503-595-3970 ♦ 503-595-3974 fax ♦ www.pacific-research.org

May 1, 2015

Kimberly Whelan
Mt. Hood Cable Regulatory Commission
IRFP Number MHCRC2015
Evaluation Services for MHCRC Grants in Public Education

Dear Ms. Whelan,

Pacific Research and Evaluation (PRE) is pleased to submit this proposal for the evaluation of the Mt. Hood Cable Regulatory Commission's TechSmart Initiative. Since its inception, PRE has assisted numerous organizations to improve their services and programs by guiding them through systematic processes for making data-driven decisions. Our utilization-focused, participatory approach to evaluation includes high-quality research design, data analysis, and reporting services.

During the past five years, PRE has conducted more than 60 K-12 school-based program evaluations involving thousands of schools. We have a significant amount of experience providing services to local school districts and are passionate about conducting evaluation work locally to help districts understand the impact of their efforts on key student achievement outcomes. Particularly relevant to this proposal are two recent projects evaluating the role of technology in student achievement. We understand the importance of technology in education today and would value the opportunity to work with MHCRC to evaluate the TechSmart Initiative.

If selected as the project evaluator, PRE is committed to providing high-quality, collaborative evaluation services throughout the entire project period. We will ensure that our methods of evaluation include the use of objective performance measures that are directly related to the project outcomes and will provide timely formative and summative feedback to assist MHCRC and partner districts in meeting program goals and objectives.

We accept all terms and conditions of the RFP and no redactions are requested. My contact information is listed below as the person authorized to represent PRE in any negotiations or contracting. If you have any questions regarding our organization or our proposal, please do not hesitate to contact me.

Sincerely,

Steven P. Rider

Steven Rider, Ph.D., President
Pacific Research and Evaluation, LLC
3507 SW Corbett Avenue
Portland, OR 97239
Phone: (503) 595-3970
Email: Steve@pacific-research.org
City of Portland Business Tax number: 688696
EEO expiration date: July 11, 2016
Equal Benefits Application has been approved

Table of Contents

Section 1: Cover Letter

Introduction..... 1

Section 2: Project Team 1

Section 3: Proposer’s Capabilities 5

Section 4: Project Approach 14

Section 5: Corporate Responsibility 20

Section 6: Proposed Cost 21

Section 7. Supporting Information

Section 8: PTE Participation Disclosure Form 1

Introduction

Aligned with the broader community effort of the All Hands Raised Partnership, the Mt. Hood Cable Regulatory Commission launched the TechSmart Initiative for Student Success in the Fall of 2014. Over the next eight years, this initiative will provide grants to six partner school districts in Multnomah County for technology and teacher supports designed to innovate and transform teaching strategies and make progress towards the following six student achievement outcomes: 1) Kindergarten Readiness, 2) English Language Learners' Annual Progress, 3) Third Grade Reading, 4) Eighth Grade math, 5) Ninth Grade Credit Attainment, 6) High School Graduation.

MHCRC plans to award one strategic 3-5 year grant to each of the six partner school districts which include: Portland Public Schools, Reynolds School District, Gresham-Barlow School District, David Douglas School District, Centennial School District, and Parkrose School District. With the assistance of the TechSmart Initiative, districts will gain and leverage critical technology resources in order to identify and implement effective instructional strategies and practices that use technology to foster improvement in academic outcomes for all students.

Pacific Research and Evaluation is intrigued with the TechSmart Initiative, and its potential impact on Multnomah County schools, teachers, and students. We have significant experience partnering with local districts to provide evaluation services and would be eager to work with MHCRC on this evaluation. Our qualifications and proposal for completing the scope of work are detailed below.

Section 2: Project Team

Pacific Research and Evaluation, LLC (PRE) was established in 1998 is located in Portland, OR. Since its inception, PRE has pursued its mission by assisting numerous organizations to improve their services and programs by guiding them through systematic processes for making data-driven decisions. We believe that a strong, focused evaluation can do much more than meet funder requirements. By implementing high-quality evaluations without bias and with the highest standards of validity, we help organizations to assess needs, clarify goals and objectives, optimize program effectiveness, and understand the connections between day-to-day activities and long-term outcomes. At PRE, we obtain meaningful data with methodologically robust studies that withstand critical review. We consistently deliver accurate and usable evaluation results that enable organizations to build and sustain success. Finally, we practice evaluation according to the Joint Commission on Standard for Educational Evaluation and to the Guiding Principles for Evaluators (AEA).

Our staff are members of a variety of professional associations including: the American Psychological Association (APA), American Evaluation Association (AEA), American Educational Research Association (AERA), Society for Industrial Organizational Psychology (SIOP), and Oregon Program Evaluators Network (OPEN). This broad experience and training result in a team that is skilled in a variety of research methods and analysis techniques. Collectively, PRE's staff has the needed expertise to excel in all areas of program evaluation including but not limited to: research design, measurement, data collection, evaluation instrument construction, data analysis, and data reporting. We have used a variety of experimental and quasi-experimental designs and our staff is well trained in and has extensive experience in qualitative methods, such as focus groups and interviews. Dr. Steven Rider and Dr. Kristi Manseth have taught college courses in statistics and research methods, and PRE staff have conducted

many workshops at national conferences regarding the development of evaluation plans, logic models, and systematic data collection efforts.

The team that will be assigned to the proposed project consists of six staff and one subconsultant. Bios for each of these team members are provided below with a detailed explanation of how they will be involved in the proposed project. Resumes for all personnel are provided in Section 7.

Steven Rider, Ph.D., Primary Investigator. Dr. Rider is the President of Pacific Research and Evaluation. He earned his doctorate in Psychology at the University of Arizona, and has been conducting research and program evaluation for more than 20 years. Dr. Rider has directed a wide range of local and state projects, as well as studies funded by a variety of federal agencies, including the National Institutes of Health, the National Science Foundation, the Centers for Disease Control and Prevention, and the Departments of Education, Health and Human Services, and Justice. He has authored journal articles and book chapters, and has presented numerous papers at regional, national, and international scientific conferences. Dr. Rider has taught college courses in statistics and research methods, and has expertise in qualitative and quantitative methods, measure development, survey research, and multivariate statistical analysis.

Dr. Rider will provide high level support and oversight on the proposed project and will be available for meetings regarding the MHCRC project as needed. Dr. Rider has been leading evaluations in K-12 education for over 20 years and has significant experience working with school districts to develop logic models, incorporate data collection into pre-existing district systems, and access student outcome data from district databases. He is currently leading the Multnomah County SUN schools evaluation in which we are analyzing data from the six partner school districts involved in the TechSmart Initiative. Approximately 5% of Dr. Rider's time will be dedicated to the proposed project.

Kristi Manseth, Ph.D. – Project Manager. Dr. Manseth is the Research Director at Pacific Research and Evaluation and she earned her doctorate in Applied Psychology from Portland State University in 2009. Dr. Manseth previously worked as a post-doctoral research associate at Portland State and was heavily involved in the development and evaluation of a large-scale professional development initiative. She was previously the project manager for the North Wasco County Safe Schools/Healthy Students grant, five Nike School Innovation Fund grant evaluations in PPS, Beaverton, and Hillsboro school districts, and the Alternative Education Options Evaluation at Portland Public Schools. She is currently managing the evaluation of the University Place Math Science Partnership grant, an evaluation capacity building project with Catholic Community Services, as well as several workforce development evaluations. She provides oversight for the evaluation of Project ESCOLAR (Extent Supports of Collaborative Online Learning and Academic Reading) and is involved in data analysis for the Multnomah SUN schools project as well. Dr. Manseth has been conducting applied research for 10 years and has extensive experience in evaluating K-12 programs, professional development initiatives, mental health programs, as well as in the development of various data collection instruments including interviews, focus groups, and surveys along with the corresponding analysis and reporting of such qualitative and quantitative data.

Dr. Manseth, as the project manager for the proposed project, will be responsible for the day to day management of the project tasks and would be the primary point of contact with MHCRC. As described above, Dr. Manseth has significant experience evaluating K-12 grant programs for local school districts

and four specific projects stand out as particularly relevant to the MHCRC evaluation. First, is the Multnomah County SUN schools evaluation project which involves the same six partner school districts as the proposed project. Through the SUN schools project, Dr. Manseth has gained detailed knowledge of the district data systems and has experience working with Multnomah ESD to gain access to student outcome data. Dr. Manseth also managed several Nike School Innovation Fund Projects within Portland Public Schools, Beaverton, and Hillsboro School Districts. Dr. Manseth worked with each of these districts to lead evaluation efforts including the development of grant specific logic models, incorporating data collection instruments into pre-existing district instruments, and accessing relevant student outcome data from district research staff. Finally, Dr. Manseth's experience managing the Safe Schools Healthy Students grant in North Wasco County and the Alternative Education Options program in Portland Public Schools provided her with experience working with an interdisciplinary team to evaluate initiatives with multiple stakeholders. Specifically, the SSHS grant team was made up of community stakeholders representing the local police department, juvenile justice, DHS, and the local school district. Community wide efforts were coordinated and results shared across all of these interdisciplinary stakeholders. Similarly, Dr. Manseth's management of the Alternative Education evaluation included stakeholders from 30 different Alternative schools in Portland along with various district stakeholders. Each of these projects are described in more detail in Section three, proposer's capabilities. Approximately 12.5% of Dr. Manseth's time will be dedicated to the proposed project.

Julie Murphy, MSW., Ms. Murphy is a Research Associate at Pacific Research and Evaluation. Ms. Murphy holds a Master's of Social Work from the University of Michigan, with a specialization in administration and evaluation; she has been conducting program evaluations for over 15 years. She is currently serving as Project Manager for a variety of evaluations, including a TAACCCT and Gateway to College project, Portland Metro's Environmental Literacy Framework, as well as several human service initiatives. She has also served as the Evaluation Manager and Director on a number of federally funded demonstration projects, including evaluations of Ohio's Title IV-E Waiver, Differential Response, Kinship Navigator, a Regional Partnership grant in Summit County Ohio, and Colorado's Title IV-E Waiver. While providing project oversight and management on these projects, she is responsible for developing the evaluation design and methodology, providing supervision of all data collection and analysis efforts, writing all project reports and briefs, and communicating evaluation findings to stakeholders at local, state, and federal levels.

Ms. Murphy would provide consultation on the proposed project as needed. She recently joined the PRE team with over 15 years of experience and has been a valuable team member over the past six months. Ms. Murphy would dedicate 2% of her time to project tasks.

Regina Wheeler, M.A., is a Research Assistant at Pacific Research and Evaluation. She earned her Master of Arts degree in Educational Psychology from the University of Colorado where she had several opportunities to conduct qualitative research in education, including work for her thesis on formative assessments in an online learning environment. Ms. Wheeler's research experience also includes undergraduate work as a research assistant providing support for a quantitative study on pro-social behavior in children, as well as an internship where she studied best practices for developing out-of-school time programs. This background allowed her to perform literature reviews, conduct interviews, observe learning settings and record field notes, code behavior, perform data entry tasks, analyze data and write research reports for clients and academic audiences. She previously worked on the North Wasco

County SS/HS and PPS Alternative Education projects and is currently managing the evaluation of Project ESCOLAR (Extent Supports of Collaborative Online Learning and Academic Reading) and two TAACCCT grants through the department of labor. She has extensive experience analyzing qualitative data and creating compelling, user-friendly reports that paint a clear response to the research questions of interest.

Ms. Wheeler would be responsible for assisting Dr. Manseth with data collection, analysis, and reporting and would dedicate approximately 13% of her time to project tasks. Ms. Wheeler has been heavily involved in several K-12 evaluations in the same capacity as proposed for the current project. During her 3.5 years with PRE, Ms. Wheeler has displayed superb performance and has excelled in her attention to detail, her expertise in qualitative data analysis and reporting, and her dedication to every project she works on.

Lindy Wortman, B.S., is a Research Assistant at Pacific Research and Evaluation. Ms. Wortman earned her Bachelor of Science in Psychology from Portland State University (PSU) and is currently pursuing her Masters of Science in Educational Leadership and Policy at PSU in conjunction with a Graduate Certificate in Applied Statistics through Colorado State University. For the last six years, she has worked in various student services roles at the local community college and university, including Orientation, General, and Health Admissions Advisor as well as Faculty English Tutor an International Education Assistant Advisor. Ms. Wortman has also contributed to numerous research projects for both Portland State University and Portland Community College, assisting with data entry, cleaning, coding, and analysis. As a current graduate research assistant at Portland State, she helps maintain data collection efforts for the Program Prioritization project aimed at evaluating program effectiveness campus wide. Previous research projects include a study on a safety intervention for construction workers, the effectiveness of learning contracts for community college students on academic probation, and an examination of health disparities among minorities working in a health care facility.

For the proposed project, Ms. Wortman would be responsible for assisting Dr. Manseth and Ms. Wheeler with data cleaning and reporting. Ms. Wortman is new to PRE but has shown attention to detail and a passion for evaluation work during her time thus far. Ms. Wortman works half time at PRE and would dedicate approximately 6.5% of her time to tasks for the proposed project.

Sarah Campbell, B.A., is a Research Coordinator at PRE and earned her Bachelor of Arts degree in Psychology and Hispanic Studies from Lewis & Clark College in 2012. During her undergraduate training she worked on the Early Childhood Development Project as a research assistant, on both the Contributions to Infants' Understanding of Intention and the Preschool Social Cognition projects. For the proposed project, Ms. Campbell would assist with data management, including data coding, entry, cleaning, and analysis. She also conducts interviews and assists with data collection and writing evaluation reports and proposals. Ms. Campbell has been heavily involved in local K-12 projects for Portland Metro, has exceeded expectations in her work at PRE, and would dedicate 1% of her time to the proposed project.

Kristina Smock, Ph.D. – Subconsultant, has more than 10 years of experience as a consultant with non-profits and local government. She holds a Ph.D. in Sociology from Northwestern University and also has extensive on-the-ground experience with a wide variety of community-based organizations. Dr. Smock specializes in qualitative research methods including focus groups, interviews, content analysis, and field

work. She applies her academic training and analytical skills to the real-world issues her clients face, to create practical, cost-effective, and strategic solutions. Dr. Smock is a nationally recognized expert on community engagement and community building. Her book *Democracy in Action* (Columbia University Press, 2004) analyzes different models of organizing low-income residents to create urban change. Dr. Smock also works with organizations in the areas of social equity, homelessness, affordable housing, community development, and human services. In addition to her consulting work, Dr. Smock has taught graduate and undergraduate classes in community organizing, urban development, and gentrification as an adjunct instructor and full-time faculty member in urban studies programs in Portland and Chicago.

Dr. Smock will be providing qualitative assistance for the proposed work. Specifically, she will be conducting interviews with selected teachers and district leaders, and completing the corresponding analysis and reporting of this data. Dr. Smock will be dedicating 2% of her time to tasks for the proposed project.

The section below details our capabilities including relevant project experience on similar or related projects. These projects were selected to highlight our experience in K-12 education in the Portland area, district and school based grant evaluations designed as part of a larger grant initiative, experience incorporating evaluation data collection into pre-existing district measures, and our experience accessing and linking student outcome data to grant funded initiatives.

Section 3: Proposer's Capabilities

As indicated previously, Pacific Research and Evaluation, LLC was established in 1998 and is located in Portland, OR. Our current staffing structure includes the company president, two research associates, four research assistants, and a research coordinator. We have been conducting K-12 program evaluation in Portland and across the country for over 15 years and are passionate about partnering with local school districts to evaluate district initiatives and the associated impact on student outcomes. Our company address is listed below followed by additional detail about our experience in program evaluation.

Pacific Research and Evaluation
3507 SW Corbett Avenue
Portland, OR 97239
Phone: (503) 595-3970

PRE will subcontract with Kristina Smock Consulting on this project. This sole proprietorship has been in business for 14 years and has one employee. Kristina Smock Consulting has expertise in the areas of research, policy analysis, qualitative evaluation, project management, and facilitating diverse stakeholder groups.

Pacific Research & Evaluation staff has substantial expertise in experimental design and a wealth of experience in gathering and analyzing quantitative and qualitative data. We have used a variety of experimental and quasi-experimental designs and our staff is well trained in and has extensive experience in qualitative methods, such as focus groups and interviews. Our many years of experience in the area of research methodology is evidenced by our contract from 2004-2010 with the U.S. Department of Justice, in which we were chosen to provide technical assistance to grantees throughout the country regarding evaluation design, measurement, data collection and other issues.

When we design evaluations, we typically conduct thorough literature reviews of related programs, and consult with program staff to determine the best approach to a specific project. Our evaluation designs include the collection of both quantitative and qualitative data, as we believe that incorporating a qualitative research methodology adds a rich component that is vital to any project, and may reveal important findings that might not otherwise be noted.

When possible, we prefer to use standardized data collection tools to measure relevant variables and assess progress toward project objectives. We are skilled in evaluating the psychometric properties (e.g., reliability and validity) of standardized measures. When standardized instruments are not available or appropriate for measuring the outcomes of interest for a particular project, however, we are fully capable of developing data collection tools. All Pacific Research & Evaluation staff members have developed both large and small-scale measurement tools. In our experience, developing tools in collaboration with our clients ensures that data collection will run smoothly and increases evaluation buy-in. Thus, we value our clients' feedback throughout the development process. Finally, we understand the importance of minimizing data collection efforts in organizations and work to integrate our tools into pre-existing systems when possible.

For quantitative analyses, we typically use SPSS and are skilled in conducting descriptive analyses (e.g., frequencies, means), basic group comparisons (e.g., t-tests, analysis of variance), correlational analyses (e.g., correlation, multiple regression, discriminant function analysis), and advanced multivariate analyses (e.g., multivariate analysis of variance, analysis of covariance, structural equation modeling).

Pacific Research & Evaluation staff also has extensive experience collecting and analyzing qualitative data. We engage in research to examine the how or what types of questions, exploring the research questions sometimes through focus groups, interviews, and open-ended survey questions, to develop a detailed view. In our experience, it is often true that only by looking at a combination of quantitative and qualitative data that one can gain a complete understanding of program functioning, client outcomes, and program development issues. Pacific Research & Evaluation staff integrates qualitative data collection and analysis into virtually all our research and evaluation work.

Relevant Project Experience

As mentioned above, the following projects were selected to highlight our experience in K-12 education in the Portland area, technology related evaluation, district and school based grant evaluations designed as part of a larger grant initiative, experience incorporating evaluation data collection into pre-existing district measures, and our experience accessing and linking student outcome data to grant funded initiatives.

Educational Attainment

PRE has extensive experience in K-12 education. During the past five years alone, we have designed and implemented evaluation plans for a variety of local, state, and federal programs, including more than 60 K-12 school and district level programs involving thousands of schools. Projects encompassed in this experience include the Safe Schools Healthy Students grant initiatives described above and also our work with Portland Public Schools Education Options. In addition, PRE was heavily involved in a series of Nike School Innovation Fund grants awarded to Portland Public Schools, Beaverton, and Hillsboro

School districts. Each of these project is described in more detail below along with an individual who can be contacted regarding our performance on each project.

Safe Schools/Healthy Students Initiative

Project Summary: The staff at Pacific Research & Evaluation has designed and implemented long-term evaluation plans for 11 federally funded *Safe Schools/Healthy Students* (SS/HS) projects in six states and the District of Columbia. Nearly ten years of continuous experience with SSHS projects nationwide has given us invaluable knowledge regarding how to perform a thorough and effective evaluation that meets local needs as well as national requirements. Pacific Research & Evaluation also provided evaluation technical assistance and training to more than 200 Safe Schools/Healthy Students (SS/HS) initiative grantees receiving an average of \$2 million annually for 3-4 year projects. PRE conducted national and regional trainings which addressed topics such as evaluation design, logic model development, data analysis, reporting, and program sustainability. Targeted technical assistance was offered for specific site needs regarding evaluation.

Contact: Susan Salkield, MA, MSW: Former Project Director for the SS/HS Initiative
Tigard-Tualatin School District
6960 SW Sandburg St
Tigard, OR 97223
Phone: (503) 431-4133
Email: ssalkield@ttsd.k12.or.us

Portland Public Schools Alternative Education Options

Pacific Research & Evaluation conducted a 5 year evaluation of Portland Public Schools' (PPS) Alternative Education Options. PPS offers a variety of alternative education options which include college preparatory programs, community-based education centers, and schools within schools. PPS also collaborates with Portland Community College providing the opportunity for students to earn a high school diploma while simultaneously accumulating credits through Portland Community College. As part of this work we provided data to over thirty Portland area schools in order to facilitate program growth and development. The evaluation plan outlined three broad categories of outcomes: academics, school connection, and preparedness. In order to gauge program and student level progress in meeting these outcomes, PRE collaborated with PPS staff to design high school student pre and post surveys that were administered to over 1,600 PPS high school students. Survey items included measures of students' level of school engagement and belonging, self-efficacy for employment and academic achievement, level of preparedness for the transition out of secondary education, and postsecondary intentions. In order to ease the data collection burden on schools, the survey was made available in both online and paper and pencil formats. Finally, in order to assist schools with the survey administration process and to standardize data collection protocols across multiple sites, PRE staff developed a survey administration guide that was distributed to all schools administering the survey. PRE staff also responded to site-specific requests for technical assistance in the survey administration process. In addition to student survey administration, PRE worked with PPS research and evaluation to access study outcome data in order to facilitate in program specific goals setting and annual school specific student outcome evaluation. Data analyzed for this project included attendance, graduation, GED, MAP, and other student success indicators.

Contact: Joe Suggs, Ph.D.
Director Research, Evaluation & Assessment
Portland Public Schools
501 N. Dixon Street
Portland, OR 97227
Phone: (503) 916-3209
Email: jsuggs@pps.k12.or.us

Nike School Innovation Fund Grant Evaluations

PRE has conducted multiple evaluations of projects receiving support from the Nike School Innovation Fund (NSIF), a five-year, \$9 million commitment to help Portland, Hillsboro, and Beaverton public schools. The NSIF is designed to support innovation in schools, targeted toward the delivery of quality education and leadership development, and has reached over 100,000 students and hundreds of teachers. Evaluation methods have included formative and summative designs including both quantitative and qualitative components. Surveys, school outcome data, classroom observations, interviews and focus groups. Three specific NSIF evaluations are described below.

Nike Portland Leadership Collaborative (PLC): Pacific Research & Evaluation conducted an evaluation of the Nike School Innovation Fund Portland Leadership Collaborative (PLC) project. In this project, partners from the University of Washington’s Center for Educational Leadership, the Nike School Innovation Fund, and Portland Public Schools (PPS), work together to provide teachers and administrators with skills in the areas of effective instruction, team building, and the cycle of inquiry. PRE partnered with the collaborative to provide evaluation support for five years of grant funding. Each participating school developed a leadership team comprised of administrators and teachers who participate in the PLC program. Leadership teams received training to support program goals, and subsequently work to engage their entire school staff in using student data and new teaching methods to improve student writing. Our evaluation incorporated logic model development, survey and focus group data from teachers and administrators, and data from student writing samples and standardized achievement tests.

Nike School Innovation Fund Beaverton Leadership Innovation Grant: During the 2012-13 academic year, we worked with Beaverton School District to evaluate their NSIF Leadership Innovation Grant, which funded the Secondary Standards-Based Learning System. The Standards-Based Learning System for Grades 6-12 was a continued implementation of standards based/proficiency-based education in Beaverton's middle and high schools. The primary goal of the grant work was support of a 6-12 articulated pathways to college and career readiness for all students. In this program, partners from the Nike School Innovation Fund and the Beaverton School District (BSD) collaborated to provide teachers and administrators with skills in the area of formative assessment practices. Our evaluation for the PLC project was both formative and summative and included both quantitative and qualitative components.

Nike School Innovation Fund Hillsboro Collaborative Lesson Study: During the 2012-13 school year, we lead an evaluation of the Collaborative Lesson Study program funded by Nike School Innovation Fund in Hillsboro School District. The overarching goal of the Collaborative Lesson Study was to offer twelve elementary school teams four cycles of study that will integrate strategies for language development and access to high levels of mathematics content. Through an evaluation plan that included a combination of teacher surveys and comparative analysis of student outcome data, we are partnered with the district to assess the results of this professional development model.

Contact: Julia Brim-Edwards
Nike DF4
One Bowerman Drive

Contact: PPS NSIF
Joe Suggs, Ph.D.
Director Research, Evaluation & Assessment

Beaverton, OR 97005 Phone: (503) 88701308 Email: Julia.Brim-Edwards@nike.com	Portland Public Schools 501 N. Dixon Street Portland, OR 97227 Phone: (503) 916-3209 Email: jsuggs@pps.k12.or.us
--	--

Multnomah County Schools Uniting Neighborhoods (SUN)

SUN Community Schools are school-based delivery sites for a comprehensive set of services including educational, enrichment, recreational, social and health services focusing on school-age children at risk of academic failure, and their families. There are currently 67 SUN Community Schools in 6 school districts across Multnomah County. This includes 27 elementary, 15 middle, 18 K-8, and 7 high schools. PRE is conducting a quasi-experimental outcome evaluation comparing outcomes for elementary and middle school students participating in community school extended-day services with a matched comparison group of students not participating. Propensity scores will be used to match program and comparison participants from a data file containing more than 15,000 records.

Contact: Peggy Samolinski, MSW
Division Manager – Multnomah County SUN Service System
421 SW Oak Street
Portland, OR 97204
Phone: (503) 988-7453
Email: Peggy.l.samolinski@multco.us

Technology

PRE is currently managing two projects that are specifically related to the integration of technology into student learning. The first is focused on K-12 education and the second is focused on technology access for community college students as summarized below.

Project ESCOLAR

Pacific Research & Evaluation is currently supporting evaluation efforts of Project ESCOLAR: Extent Supports of Collaborative Online Learning and Academic Reading. This project is intended to support students with learning disabilities in sixth through eighth grade through the use of Collaborative Online Projects (COP) designed to support academic reading of science content. The project is a joint effort between the Center for Advanced Technology in Education (CATE) at the University of Oregon, Georgia Southern University, and the Biological Sciences Curriculum Study group who will develop, test, evaluate, refine, and disseminate the COPs. PRE is assisting the project coordination team with evaluation efforts by conducting interviews with project coordination team members, implementing surveys assessing teacher involvement with professional development, reviewing relevant project documentation, observing professional development sessions, visiting and documenting COP implementation at pilot school sites, and supporting analysis of data.

Contact: Fatima Terrazas Arellanes, Ph.D., Principal Investigator
University of Oregon Center for Advanced Technology in Education
1244 Walnut Street
Eugene, OR 97403
Phone: 541-346-3798
Email: fatima.terrazas@gmail.com

Gateway to College Technology Survey

Gateway to College National Network (GtCNN) Technology Access Survey. Gateway to College (GtC) is a comprehensive alternative education model designed to reengage young people who have not been successful in the traditional high school environment. GtC programs are located on community college campuses and all classes are dual-credit college classes, with flexible class times to fit the life circumstances of non-traditional students. The Network operates partnership programs between K-12 school districts and colleges at 35 sites in 20 states across the country. PRE is conducting a survey to learn how under-served students access technology and to identify implications for technology-supported education and courses relying on online curricula. A literature review was conducted to inform development of surveys for new and continuing students. The surveys were piloted during the summer of 2014 and administered during the 2014-2015 school year. Data analysis is underway, and the final project deliverable will be a white paper summarizing the findings of the literature review and surveys.

Contact: Devora Shamah, Ph.D.
Manager, Research & Reporting
Gateway to College National Network
529 SE Grand Avenue, Suite 300
Portland, OR 97214
Phone: 971-634-1203
Email: dshamah@gatewaytocollege.org

Grant Initiative Evaluations

PRE has experience evaluating grant programs that have been funded as part of a larger grant initiative and working with grantees to ensure alignment with the overarching initiative. This includes logic model and evaluation plan development, creation of evaluation tools that can be integrated into pre-existing systems, and dissemination of project results at the grantee and initiative level. The three projects below highlight this experience as well as the NSIF grant project detailed above.

Kaiser Permanente Community Fund Impact Evaluation

Since 2004, the Kaiser Permanente Community Fund (KPCF) Fund has awarded \$25 million dollars in financial support to more than 180 organizations to improve the health of individuals in communities throughout the Kaiser Permanente Northwest service region. KPCF provides funding to programs that address the “upstream” factors that create or inhibit community health, also known as the social determinants of health. In the effort to impact these upstream factors, they fund programs that help: 1) young children living in fragile environments thrive, 2) undeserved youth graduate from high school and be college ready, and 3) people in poverty earn living wages. Given the scope of the Fund, the Northwest Health Foundation and Kaiser Permanente are interested in understanding the impact that these funds have on the local communities and learning about the successes and challenges faced by organizations who receive KPCF financial support. Pacific Research and Evaluation is working with KPCF to design and implement an evaluative process to assess the impact of the KPCF Fund, communicate successes and challenges, and foster strategic learning to inform decision-making. In conducting this Impact Evaluation, PRE will first work closely with KPCF staff and partners to articulate the intended impact of KPCF funds through the development of a global theory of change and partner logic models. Subsequently, PRE will collect qualitative and quantitative data that allows PRE to document the degree to which funded partners have expanded community conditions for health. PRE will also work with KPCF partners to help assess and develop evaluation capacity among the Funds’ grantees.

Contact: Suk Rhee, Vice President, Strategy and Community Partnership
221 NW Second Ave., Suite 300
Portland, OR 97209
Phone: 503-220-1955
Email: suk@nwhf.org

Portland Metro Environmental Literacy Framework

Portland Metro's Environmental Literacy Framework (ELF) was developed to ensure that Metro Conservation Education programs provide meaningful experiences that help citizens of the region to build knowledge, skills, and capacities that lessen the impact of human action on the environment. PRE is currently partnering with Metro to provide technical assistance in the refinement of the ELF. In this capacity, PRE has facilitated the development of an ELF theory of change, as well as conducted interviews with national experts to elicit feedback on the ELF. PRE is also providing technical assistance to Metro programs in the development of program-level logic models that are aligned with the ELF theory of change. In the upcoming months, PRE will work with the ELF team to build evaluation capacity and develop a long-term evaluation plan to guide program decisions across the organization

Contact: Alison Heimowitz, School and Teacher Liaison
The Oregon Zoo
4001 SW Canyon Road
Portland, OR 97221
Phone: 503-220-5774
Email: Alison.Heimowitz@oregonzoo.org

Kaiser Permanente Northwest School Based Health Center Behavioral Health Projects

Kaiser Permanente Northwest awarded grants in the Portland Metro area to improve the health of the region's youth by increasing capacity of school-based health centers (SBHCs). SBHCs provide comprehensive health services to young people in a trusted and familiar environment - their schools. SBHCs can be a one-stop location for primary care, mental health, oral health, and health prevention services. PRE is providing evaluation services to three grantees focused on providing mental health and behavioral health services to school-age children and youth. Each grantee consists of a school district/non-profit partnership, and the evaluation includes formative and summative components designed to provide grantees with information for program improvement efforts. In addition, PRE is working closely with the three grantees to build their internal evaluation capacity so that at the end of the 3-year grant period they have the capability to collect, analyze, and report on utilization, service, and outcome data for their programs.

Contact: Catherine Potter, MA
Safety Net Partnerships Coordinator
Kaiser Permanente Northwest
500 NE Multnomah St.
Portland, OR 97232
Phone: (503) 813-3519
Email: catherine.r.potter@kp.org

Experience in Evaluation Technology to Support Student Learning

The section below describes PRE's knowledge and experience in analyzing K-12 instructional uses of digital literacy, curriculum, and technology tools to support and improve student learning and achievement. Experience from three recent projects is highlighted.

As described above, PRE is currently supporting a five year evaluation of Project ESCOLAR: Etext Supports of Collaborative Online Learning and Academic Reading. Through our work on this project, we have gained knowledge and experience analyzing the use of technology to support and improve learning for students with learning disabilities in sixth through eighth grade. PRE is assisting the project coordination team with evaluation efforts by conducting interviews with project coordination team members, implementing surveys assessing teacher involvement with professional development, reviewing relevant project documentation, observing professional development sessions, visiting and documenting collaborative online project implementation at pilot school sites, and supporting analysis of data.

In addition to our work with Project ESCOLAR, we are currently conducting a national survey with the Gateway to College National Network to learn how under-served students access technology and to identify implications for technology-supported education and courses relying on online curricula. A literature review was conducted to inform development of surveys for new and continuing students. The surveys were piloted during the summer of 2014 and administered during the 2014-2015 school year.

Finally, our experience working with several Math Science Partnership (MSP) grantees has provided us with experience evaluating the impact of technology tools to support both teacher and student outcomes. The MSP is a grant program funded by the U.S. Department of Education under the No Child Left Behind Act. Specific goals of this program include increasing the physics content and technology-based pedagogical knowledge of physical science and physics teachers through the use of real-world problems, increasing the probability and statistics content and technology-based pedagogical knowledge of mathematics teachers through the use of real-world problems, increasing the use of graphing calculators in mathematics and science teaching, increasing teachers' ability to analyze student thinking and make better instructional decisions by examining student work and using formative assessment practices to guide instruction, and increasing the number of building-level administrators who participate meaningfully in mathematics or science professional learning sessions. PRE has presented both formative and summative evaluation findings based on a pre and post content knowledge test for teachers and an analysis of student achievement.

Knowledge of the All Hands Raised Partnership

PRE is familiar with the All Hands Raised Partnership and has worked on several projects to evaluate the key outcomes of interest to the Cradle to Career Initiative. This initiative is a partnership among six school districts, county and city leaders, businesses, nonprofits, parents, students, and higher education institutions. All Hands Raised brings together these groups to help them understand how they fit together to ensure every child in Multnomah County has sustained success from cradle to career. Specifically, the All Hands Raised Cradle to Career Partnership works to improve the academic and social well-being of children in the community by focusing on 12 indicators spanning birth to 25 years of age. These include indicators such as kindergarten readiness, English language learners' annual progress, third grade reading, eighth grade math, ninth grade on track (credit and attendance), and high school graduation, all of which are consistent with the academic outcomes of the TechSmart Initiative.

These 12 indicators are addressed by five Collaborative Action Teams made up of partners focusing on specific indicators. These partner teams focus in the areas of eliminating disparities in child and youth success, early learning, communities supporting youth, ninth grade counts, and high school to college and career. The Collaborative Action Teams use continuous improvement tools to analyze data in order to focus on what is working and where improvements should be made in order to ensure the success of youth.

PRE has recently been involved in two evaluation projects related to the All Hands Raised Partnership. First, our work with Multnomah County and the SUN Schools Initiative is evaluating the impact of the SUN services on various student achievement outcomes including third grade reading and eighth grade math. In addition, in our work with the Kaiser Permanente Community Fund, we are providing evaluation to programs that are delivering services designed to help: 1) young children living in fragile environments thrive, 2) undeserved youth graduate from high school and be college ready, and 3) people in poverty earn living wages. These focus areas have significant overlap with the All Hands Raised Partnership goals. In general, our extensive experience in K-12 education has provided us with the opportunity to evaluate each of the following student success indicators that will be a focus of the proposed work: Kindergarten Readiness, English Language Learners' Annual Progress, Third Grade Reading, Eighth Grade Math, Ninth Grade Credit Attainment, High School Graduation.

Resources

PRE has the resources available to successfully perform both phases of work for the proposed project. We are financially stable and have the staffing capacity to both manage and assist with the proposed project. The company has been in operation for 15 years, and has never carried any debt. Our internal accounting, financial, and business management systems, controls, and personnel are firmly in place, and existing office space and equipment will suffice for all phases of this project.

Internal Controls

PRE's internal procedures related to work quality and cost control include clear delineation of project tasks to assigned team members, cross team inquiry and review, and continuous communication with our clients. Specifically, the proposed project team will work to ensure all tasks are completed in a timely manner and all deliverables are high quality. For cost control purposes, research assistants are responsible for day to day data analysis and reporting and the project manager provides oversight and direction for these tasks. We will utilize members from other PRE teams to provide consultation as needed and also for review of final deliverables to ensure exceptional quality. Due to the small nature of our organization, our project managers and the company president are both easily accessible to clients when needed.

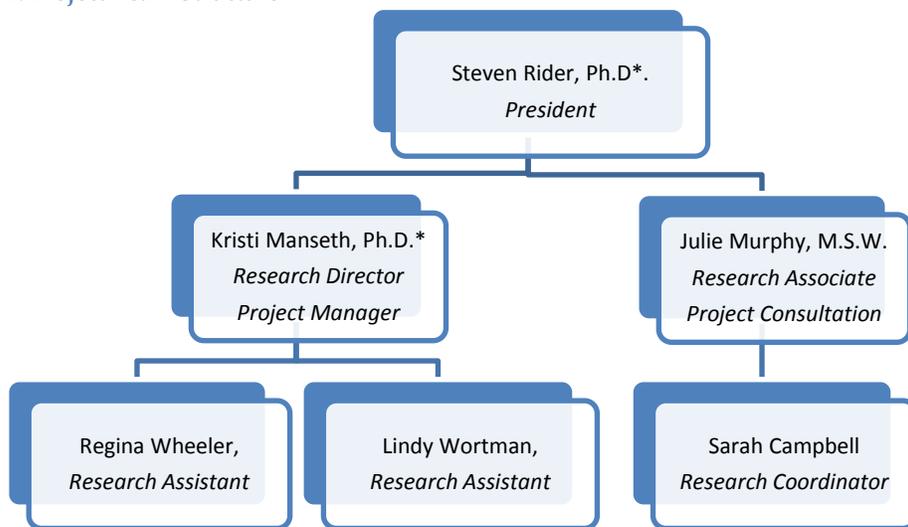
Management and Organizational Capabilities

Pacific Research and Evaluation would value the opportunity to work with MHCRC and the partnering school districts in the evaluation of the TechSmart Initiative for Student Success. Although we provide evaluation expertise in a variety of areas, we are particularly passionate about contributing to efforts in our local school districts. Our overall approach to the management and integration of the activities required by the scope of work are detailed below.

PRE will engage with MHCRC to provide high quality evaluation design expertise related to the TechSmart Initiative in order to better understand the impact of the grant investments within Multnomah County and on K-12 student outcomes. We have reviewed the scope of work presented in this IRFP and

will plan to work with MHCRC and the six Multnomah County school districts to initiate and guide successful grant evaluation. We will work with the key stakeholders to implement the proposed evaluation using best practices in program evaluation. Specifically, we will finalize the overarching TechSmart logic model with MHCRC and work with partner school districts to ensure project evaluations are aligned with this model. We will work with districts to analyze existing data systems in order to make recommendations regarding the integration of TechSmart evaluation tools into pre-existing methods. We will produce presentations that summarize evaluation findings to illustrate the overall impact of the TechSmart Initiative on teacher strategies and student achievement outcomes. The project manager will be actively engaged in all aspects of the proposed work. She will be involved in all meetings with MHCRC and district staff, she will lead the design of all data collection instruments, and hold primary responsibility for analysis and reporting of key outcomes. She will guide her team to provide the most meaningful data to MHCRC and district staff and will be flexible regarding potential changes in the scope of work. At PRE, we value active client involvement in the evaluation process and are always open to making changes that will result in meaningful data that can be utilized to drive change or illustrate program success. Additional details regarding the project approach and understanding are provided in section four below. An organizational chart of Pacific Research & Evaluation staff proposed for this project is included in **Figure 1**.

Figure 1. Project Team Structure



*Indicates individual(s) who will have prime responsibility and final authority for the work.

Section 4: Project Approach

PRE’s approach to evaluation is utilization-focused, participatory, and when appropriate, developmental. In our experience, these approaches work in synergy to generate the most meaningful, useful, and timely evaluation results. Utilization-focused evaluation begins with the premise that evaluations should be judged by their utility and actual use; therefore, evaluators should facilitate the evaluation process and design any evaluation with careful consideration of how everything that is done, from beginning to end, will affect use of the findings. Utilization-focused evaluation is a process for making decisions about these issues in collaboration with an identified group of primary users.

Participatory evaluation is a partnership approach in which stakeholders actively engage in developing the evaluation and all phases of its implementation. They assist in generating research questions, planning the evaluation design, selecting appropriate measures and data collection methods, gathering and analyzing data, reaching consensus about findings, conclusions, and recommendations, disseminating results and preparing action plans to improve performance. Engaging stakeholders in this way builds evaluation capacity, establishes buy-in, and ensures the quality and utility of projects and findings.

Developmental evaluation is an approach in which evaluators work closely with evaluation stakeholders to understand and support developmental or emergent changes. A developmental approach to evaluation is particularly well-suited to programs that are in a state of innovative development and adaptation. Developmental Evaluation informs and supports innovative and adaptive processes by asking evaluative questions, applying evaluation logic, and gathering and reporting evaluative data to support program development with timely feedback. The evaluator's primary functions are to elucidate the innovation and adaptation processes, track their implications and results, and facilitate ongoing, real-time, data-based decision-making in the developmental process.

The plan below provides a description of all proposed work tasks and activities as well as PRE's plan for executive these tasks during each phase of the project. A timeline for implementing each of these included at the end of this section.

Phase 1.

The key tasks proposed for Phase 1 of the TechSmart evaluation initiative include: 1) Logic model finalization for the overall initiative, 2) Development of an overall TechSmart evaluation plan including district evaluations that are in line with the TechSmart logic model, and 3) Analysis of pre-existing data systems within partner school districts as well as the MHCRC Grants Management System. Each of these tasks is described in more detail below.

Logic Model Development

PRE will work in collaboration with MHCRC staff and partner school districts to finalize the TechSmart Initiative logic model. Our project team will meet with each of the partner school districts to guide them through the TechSmart logic model and collect suggestions regarding district-specific goals, activities and outputs that align with the short-term, intermediate, and long-term outcomes of the initiative. The team members involved in logic model development will include Dr. Rider, Dr. Manseth, and Ms. Wheeler. At the conclusion of this task, the initiative will have a finalized evaluation plan and districts will have an understanding of what the model means for their involvement in the initiative. This task will be a collaborative one with PRE, MHCRC staff, and district staff. PRE has extensive experience with logic model development and we are confident in our ability to effectively complete this aspect of the proposed project.

Evaluation Plan Development

PRE will work with MHCRC and the partner school districts to design an evaluation plan that is aligned with the TechSmart logic model and that will be sustainable for multiple years. There are two primary goals of the TechSmart Initiative as detailed below. PRE will work with MHCRC to evaluate each of these goals using the pre-existing logic model and the data collection methods proposed below.

Goal 1: School districts funded by the MHCRC grant investments will understand and implement effective instructional strategies and practices that use technology to foster improvement in academic outcomes for all students.

Goal 2: The MHCRC and school districts will validate and disseminate effective instructional strategies and practices that use technology to foster improvement in academic outcomes for all students.

In addition to the goals listed above, MHCRC staff have developed a framework identifying certain factors central to systems change and successful technology adoption. PRE will work with MHCRC to integrate questions into our data collection instruments that evaluate district progress on each of these factors. This will allow us to provide meaningful data to MHCRC for purposes of moving specific funding proposals through the grant making process and for collaborating with districts to deepen the partnership over time. These factors include:

- Teacher Effectiveness
- Digital Age Learning Culture
- Engaged Communities and Partners
- Visible Leadership
- Strategic Planning
- Data Driven Improvement
- Funding and Budget

PRE will partner with school districts to ensure that their project evaluations are aligned with the TechSmart logic model and to ensure measurement of the factors listed above. PRE has recent experience working with grantees that have been funded as part of a larger initiative to create project specific evaluations aligned with higher level goals and theories of change; this experience is highlighted below.

PRE is currently using this approach for a project with Portland Metro and several divisions within Metro: the Oregon Zoo, Metro Parks, and Metro Waste Reduction. The goal of the effort is to increase the environmental literacy of citizens in the Portland Metro area. Metro provides funds to a number of programs within their organization, all of which provide environmental literacy education from different perspectives and to different populations. PRE is helping this group develop a global environmental literacy theory of change and, subsequently, programmatic logic models and evaluations that augment the broad theory of change. The hope for this project is that by creating a common framework around practices and outcomes, the combined efforts of these programs will be more effective because all Metro environmental education programs are collectively focused on impacting a common set of environmental literacy outcomes. We are also developing program specific logic models and evaluation plans for an overall theory of change in our current work with the Kaiser Permanente Community Fund.

The table below summarizes draft evaluation questions provided by the MHCRC Tech Smart Initiative along with proposed data collection methods. We have paired the questions with the potential methods for evaluating each but are open to adjusting this plan in collaboration with MHCRC staff and the partner school districts. We suggest creating evaluation questions and corresponding methods aligned with the seven factors included in the theory of change as relevant. PRE will work with the MHCRC staff as well as the partner districts to design a plan that incorporates these methods along with others that may be determined to be beneficial during collaborative meetings between PRE and the project teams. At

minimum, the following questions and methods will be integrated into district level evaluation plans. Additional details of the evaluation plan will be determined during Phase 1 of the scope of work.

Table 1. Evaluation Questions and Data Collection Methods

Evaluation Question	Data Collection Method
Is the practice positively impacting the achievement gap of the student cohort?	Annual Teacher Survey Teacher Interviews Student Cohort Studies
Is the practice improving student achievement in the targeted academic outcome(s)?	Annual Teacher Survey Teacher Interviews
Does the practice correlate with measurable improvement over time for the student cohort in the identified academic outcomes?	Student Cohort Studies PRE Student Outcome Analysis
Are all student subgroups seeing progress in achieving outcomes?	Student Cohort Studies PRE Student Outcome Analysis
Is the practice reducing the achievement gap among student subgroups?	Student Cohort Studies PRE Student Outcome Analysis
Does the practice use differentiated/individualized learning strategies? What are they?	Annual Teacher Survey Teacher Interviews
How does the practice use student assessment data to provide feedback to students and teachers about a student’s progress?	Annual Teacher Survey Teacher Interviews
Does the practice use technology for individual student assessment?	Annual Teacher Survey Teacher Interviews
Do teachers report positive classroom results through implementation of the strategy? What positive results (aside from the student academic progress)?	Annual Teacher Survey Teacher Interviews District Leader Interviews
How does the practice engage students in their learning?	Annual Teacher Survey Teacher Interviews
How are digital citizenship skills and responsibilities integrated into classroom learning and curriculum?	Annual Teacher Survey Teacher Interviews
What educational research or learning theory does the practice draw on?	Annual Teacher Survey Teacher Interviews
In what ways is technology used to support instruction and student learning?	Annual Teacher Survey Teacher Interviews
Has the professional development helped teachers use technology to implement effective differentiated instruction and to use and analyze student data?	Annual Teacher Survey Teacher Interviews District Leader Interviews
Has the practice transferred to other classroom settings?	Annual Teacher Survey Teacher Interviews District Leader Interviews
Can the technology be scaled and sustained within existing school resources?	Annual Teacher Survey Teacher Interviews District Leader Interviews
Has the practice been validated in multiple settings and with additional student cohorts?	Annual Teacher Survey Teacher Interviews District Leader Interviews

Data Collection Methods

The proposed data collection methods for evaluating the TechSmart Initiative within the partner school districts are detailed below. Establishing the data collection methods will take place during Phase 1 of the project and the implementation will take place during Phase 2 of the project.

Annual Teacher Survey

Teacher surveys will be conducted annually to gather data related to the use of technology and the impact of the teacher professional development on abilities to differentiate and individualize learning, engage students, assess students' progress, and improve teaching of the Common Core skills. In addition, teachers will be asked to provide subjective data regarding the impact that the practice is having on student achievement. PRE will work with MHCRC and the districts to create teacher surveys that can be integrated into pre-existing data systems and add any additional topics of interest to the initiative and the districts.

Interviews with Select Teachers

Interviews will be conducted with select teachers to follow up on results of the annual teacher surveys. Content of the interviews can be determined upon analysis of the teacher survey data. Any unanswered questions or topics needing more discussion can be included in the teacher interview protocols. Teachers will also be asked about the transfer of training to the classroom and how the technology may be sustained within existing school resources.

Interviews with District Leaders

Interviews with district leaders will provide information about the extent to which districts are actively exchanging data and information about Promising Practices and Effective Practices so that they may be implemented and validated in new settings. In addition, leaders will be asked to discuss perceptions of teacher success and student achievement outcomes related to the project. Finally, leaders will provide data on sustainability of the technology.

PRE assistance with PSU Cohort Studies of Student Achievement

MHCRC will continue to contract with Portland State University to provide analysis of student level data in order to assist the MHCRC staff and districts in linking initiative investments in teaching models, practices, and strategies to advancements in student achievement. As part of the evaluation contract, PRE will offer assistance to PSU and conduct additional student analyses as relevant to the impact analysis.

Six-Month Grant Reports

PRE will collaborate with each district to create six-month grant reports which will include information and data from each district regarding the results of the grant project implementation and evaluation. These reports may include the following as detailed by MHCRC: 1) District reflective inventory, 2) District developmental stage reports on progress in each year of the grant, 3) District formative classroom assessment tools and data.

PRE will partner with MHCRC and each of the school districts to implement the evaluation design above and will be flexible to make adjustments to the scope of work in order to provide meaningful data to both MHCRC and district staff in terms of the impact of the projects on student achievement.

Analysis of Pre-existing Data Systems

The final piece of work during phase 1 of the project will be to conduct an analysis of current data collection methods and tools used by the school districts to determine and identify usefulness in integrating into the TechSmart evaluation. In addition, PRE will identify evaluation data that can be obtained through the MHCRC Grants Management System. The goal of this work will be to provide a data census for the purpose of learning about the timing of pre-existing data collection and the extent to which the data collection associated with this project can be integrated into pre-existing systems.

Phase 2.

The objective of Phase 2 of the proposed project would be to conduct the TechSmart evaluation as it was proposed in the Phase 1 deliverables. This will include working with partner school districts to ensure their project evaluations align with the TechSmart logic model and implementing the data collection methods as proposed above.

Deliverables in Phase 2 will include reports about activities, analysis, and results of the evaluation for each of the partnering school districts as well as a report for the TechSmart Initiative as a whole. This will include six-month grant reports as described above. Pacific Research & Evaluation has a solid history of presenting clients with high quality data in a timely manner, and we are committed to achieving these reporting goals for the TechSmart Initiative. All higher level staff at PRE have prepared numerous reports and presented them at regional, national, and international conferences. The reports will be presented in a narrative that is easy to read and understand. Graphs and charts will be used to illustrate and display the quantitative findings. The reports will include a description of the methodology used in the evaluation, detailed analysis, key findings, recommendations for program improvement, and areas for further exploration. In addition, we are committed to responding to “as needed” stakeholder requests for information and data.

A proposed timeline for conducting each phase of the project is presented below. It is important to note that this is a suggested timeline and PRE is flexible to work with the MHCRC staff and the partnering school districts to adjust as needed.

Table 2. Timeline

Task	Date
Phase 1	
Kick-off meeting with the TechSmart Initiative team and partnering school districts as applicable.	June, 2015
Finalize the logic model in collaboration with MHCRC staff and partner school districts.	July, 2015
Design a TechSmart evaluation plan aligned with the TechSmart logic model	July/August 2015
Conduct analysis of partner districts’ data collection methods	July/August 2015
Consult with partner districts to ensure grant project evaluation plans align with the TechSmart logic model.	August/September 2015
Identify evaluation data that can be obtained through the MHCRC Grants Management System.	August/September 2015
Phase 2	
Develop data collection instruments including teacher survey and teacher and leader interviews.	Fall, 2015

Task	Date
Work with partner districts on plans for integrating data collection methods into existing instruments.	Fall, 2015
Conduct interviews with partner districts engaged in the grant projects.	Winter, 2016 Winter, 2017
Collect survey data from those partner districts engaged in grant projects. The timing of this data collection will be dependent on district data collection but we anticipate Spring of each year.	Spring, 2016 Spring, 2017
Assist PSU with cohort analyses	Ongoing
Provide evaluation reports to MHCRC and partnering districts including 6-month grant reports.	Ongoing

Section 5: Corporate Responsibility

Oregon State Certification

Pacific Research and Evaluation was certified as an ESB until early in 2014, but we no longer qualify.

MWESB Contracting

PRE will contract with Dr. Kristina Smock. Please see PTE Participation Disclosure Form 1 in Section 8.

Workforce Diversity and Community Involvement

The current workforce at PRE is comprised of more than 80% women, and 13% minorities. Pacific Research & Evaluation is an equal opportunity employer, and in order to ensure a diverse internal workforce typically posts open positions in a range of venues.

The company has a strong history of placing women and minorities in executive level positions. In the past five years, there have been two executive level placements at PRE; both were filled by women, with one being African American and one Caucasian. Further, PRE has a solid record of assisting its junior staff members to achieve their ultimate career goals through pursuing advanced degrees. While there has historically been very low turnover among PRE staff, when employees do leave PRE, they have typically left to pursue additional educational opportunities. Over the past five years, six female employees have gone on to pursue advanced degrees: three to Ph.D. programs, one to medical school, and two to master's programs. In every case, these women were encouraged to pursue their goals, received mentoring to help them do so, and were given a strong letter of recommendation from the President of Pacific Research and Evaluation. Additionally, all employees interested in attending professional development opportunities are encouraged to attend with fees often covered by PRE. Employees, including women and minorities, also receive mentoring while working at PRE; the organization is organized with Research Assistants working directly with specific Research Associates, which has fostered mentor-mentee relationships.

All staff are offered fully-paid health insurance premiums, generous paid time off, a retirement plan with a matching company contribution, flexible scheduling, and the opportunity to telecommute two days per week. In addition, all staff receive living wages, which are usually raised on an annual basis to meet cost of living increases plus performance increases. Employees also have an opportunity to earn bonuses as a reward for securing new projects and clients.

PRE staff are encouraged to volunteer with local organizations, and are allowed scheduling flexibility in their volunteer efforts. PRE staff have volunteered with a number of local non-profits, including the Oregon Food Bank, the Junior League of Portland, the American Red Cross, the Rebuilding Center, the Oregon Humane Society, and the Oregon Program Evaluators Network.

Finally, in 2014, PRE completed a pro bono evaluation project for CareOregon, helping them to pilot test the effectiveness of their Give2Get program, which serves Medicaid (OHP) and Medicare enrollees. The program connects low-income and disabled members with one another so they can assist each other with various needs, such as chores, meal preparation, or in-person social networking. The success of this project, and the value which we could see that it brought to our community, has prompted us to begin a more proactive effort to provide pro bono evaluation services to local non-profits. We have a standing invitation on our website describing this, and are actively working with a local organizational development consultant to identify opportunities to provide pro bono services to select organizations.

Sustainable Business Practices

Pacific Research and Evaluation is committed to sustainability practices, as these minimize environmental impact and are cost-effective. Our top five actions or ongoing practices are listed below.

1. All staff are encouraged to avoid printing documents except when necessary, and to print documents double-sided unless there is a compelling reason to do otherwise.
2. PRE also avoids waste by sending invoices electronically when this is acceptable to clients and by offering non-disposable dishes for meals eaten at the office. In addition, every work station is equipped with a recycling bin for paper products, and a recycling bin for glass, plastic, cans, and cardboard is centrally located.
3. Our office is equipped with video-conferencing and teleconferencing equipment to reduce the need for fuel-emitting travel. Furthermore, the office is located near both bus and streetcar lines allowing employees to take public transit.
4. Employees are also encouraged to carpool to and from meetings in order to reduce the need for fuel-emitting travel.
5. Finally, office space has been allocated for bike storage and several staff have taken advantage of this over the years by commuting by bicycle. All of these ongoing practices have been in effect for more than 12 years, which is the entire duration that PRE has occupied office space.

PRE has experience in Environmental Evaluation which has involved evaluating programs focused on forestry and natural resource education as well as waste prevention and resource conservation education. We are part of the Environmental Evaluators Network (EEN) whose purpose is to advance the practice, policy, and theory of evaluating environmental programs, policies, and other interventions through more systematic and collective learning.

Section 6: Proposed Cost

The budget below covers the scope of work outlined in the proposal, and contains fully loaded hourly rates for all proposed staff. The budget includes costs for personnel and supplies. We do not anticipate additional costs for equipment, contractual, or any other expenses. We are committed to conducting an effective, efficient evaluation within the allotted budget, and take pride in our history of completing high quality work prior to project deadlines.

	Rider	Manseth	Murphy	Wheeler	Wortman	Smock	Campbell	Subtotal
<i>Phase 1</i>	PI	PM	RAssoc.	RAst.	Rasst.	Sub.	OM	
Ongoing Project Consultation	40		20					60
Kick-off meeting with the MHCRC staff and partnering school districts.	5	5		5				15
Finalize the logic model in collaboration with MHCRC staff and partner school districts.	10	20						30
Design an evaluation plan aligned with the TechSmart logic model.	10	60		40				110
Conduct analysis of partner districts data collection methods.		20		30				50
Consult with partner districts to ensure grant project evaluation plans align with the TechSmart logic model.	10	40		40				90
Identify evaluation data that can be obtained through the MHCRC Grants Management System.		10		10				20
Personnel Hours	75	155	20	125	0	0	0	375
Hourly Rate	\$124	\$70	\$68	\$40	\$32	\$120	\$40	
Personnel Cost Subtotal Year 1	\$9,300.00	\$10,850.00	\$1,360.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$26,510.00
Supplies Cost for Year 1								\$480.00
Total Cost for Year 1								\$26,990.00
<i>Phase 2</i>								
Ongoing Project Consultation	40		40				40	120
Administrative Support							40	40
Develop data collection instruments including teacher survey and teacher and leader interviews.		30		20	20			70
Work with partner districts on plans for integrating data collection methods into existing instruments.		60		120				180
Conduct interviews with districts engaged in the grant projects.						40		40
Interview Data Analysis and Reporting						40		40
Collect survey data from those partner districts engaged in grant projects.				20	20			40
Assist PSU with cohort analyses and other student outcome analysis.		60		20				80
Provide evaluation reports to MHCRC and partnering districts	50	160		170	200			580
Personnel Hours	90	310	40	350	240	80	40	1150
Hourly Rate	\$124	\$70	\$68	\$40	\$32	\$120	\$40	
Personnel Cost Subtotal Phase 2	\$11,160.00	\$21,700.00	\$2,720.00	\$14,000.00	\$7,680.00	\$9,600.00	\$1,600.00	\$68,460.00
Supplies Cost for Phase 2								\$480.00
Total Cost for Phase 2								\$68,940.00
Total Hours for Phase 1-2	165	465	60	475	240	80	40	
Total Cost for Phase 1-2								\$95,930.00

Section 7. Supporting Information

Resumes for Key Personnel

- Steven Rider, Ph.D.**
 - Kristi Manseth, Ph.D.**
 - Julie Murphy, M.S.W.**
 - Regina Wheeler, M.A.**
 - Lindy Wortman, B.S.**
 - Sarah Campbell, B.A.**
 - Kristina Smock, Ph.D.**
-



Steven Rider, Ph.D.

Pacific Research and Evaluation, LLC
3507 SW Corbett Avenue
Portland, Oregon 97239
Phone: (503) 595-3970
Fax: (503) 595-3974
Email: Steve@Pacific-Research.org

Education

- 1997 Ph.D.: Clinical Psychology
University of Arizona, Tucson, Arizona
- 1993 Master of Arts: Psychology
San Jose State University, San Jose, California
- 1989 Bachelor of Arts – Psychology
Westmont College, Santa Barbara, California

Professional Experience

- 9/98 – Present **President:** Pacific Research & Evaluation, LLC, Portland, Oregon
- Pacific Research and Evaluation specializes in organizational assessment and program evaluation and has offices in Portland, Atlanta, and Washington, DC. Since 1998, we've offered services to organizations of all kinds and at locations across the nation to help them broaden their capacity and improve their results by offering impartial, expert advice driven by the data we gather regarding their programs, services, and outcomes.
 - Current staff of 10 includes executive staff, Research Associates, Research Assistants, Interviewers, Data Entry Specialists, and administrative staff.
 - Staff has assisted clients in writing successful grant proposals from \$2,000 to \$9 million.
 - Dr. Rider has served as the Principal Investigator for a wide range of local and state research and evaluation projects, as well as studies funded by a variety of federal agencies, including:
 - U.S. Department of Labor
 - U.S. Department of Education
 - U.S. Department of Health and Human Services
 - U.S. Department of Justice
 - U.S. Department of Defense
 - The National Institutes of Health
 - The National Science Foundation
 - The Centers for Disease Control and Prevention

7/97 – 8/00

Principal Evaluation Specialist: Contracts and Evaluation Unit, Department of Community and Family Services, Multnomah County, Portland, Oregon

- Supervised a 12-member Evaluation Team that was responsible for monitoring and evaluating a variety of human service programs (e.g., alcohol and drug abuse, parenting and child development, mental health, teen pregnancy, homeless youth, developmental disability, etc.) within Multnomah County
- Lead evaluator on three to five projects. Oversaw the evaluation projects of three other principal investigators and program evaluators on the team.
- Responsible for providing technical assistance to team members, balancing their workloads, ensuring that the team was producing quality work in a timely fashion, and completing annual employee performance evaluations
- Consulted with Division Managers, program staff, and service providers regarding a wide variety of outcome measurement and evaluation issues, designed and planned evaluations, managed large databases, conducted statistical analyses, and wrote evaluation reports
- Wrote the evaluation plan and was the principal evaluator on a three-year, \$2.2 million grant from SAMHSA (Substance Abuse and Mental Health Services Administration) designed to enhance services to dually diagnosed adolescents
- Lead evaluator for the Downtown Portland Homeless Youth Service System, a collaborative effort among several agencies which provide a continuum of services with annual funding of \$2.5 million.
- Taught a Statistics and Research Methods seminar series within the County, and participated on several relevant committees, including the Fully Integrated Data System Team, which oversaw the development of a data warehouse within the Department of Community and Family Services, the Outcomes Committee of the Multnomah County Commission on Children, Families, and Community, the Leaders Roundtable Committee on Confidentiality and Records Sharing, and the Key Results Strategic Planning Team within the Department of Community and Family Services.

7/96 – 9/96

Research Assistant: Portland Veterans Administration Medical Center, Portland, Oregon

- Worked on a literature review regarding the content and process of medical visits, with a focus on physician-patient communication and the use of time during the visit
- Participated in studies investigating the impact of a multidisciplinary primary care treatment team on the health care utilization of cardiac patients, and of the efficacy of a chronic pain management program in reducing symptoms, pain behaviors, and health care utilization in a sample of veterans
- Responsibilities in the latter two studies above consisted of developing the research methodology, extracting health care utilization data, and conducting analyses

8/95 – 6/96

Research Assistant: Community Partnership of Southern Arizona, Tucson, Arizona (Community Partnership of Southern Arizona is responsible for the administration and oversight of all public mental health services provided in five counties in southern Arizona.)

- Involved in several lines of research in this position, including evaluations focused on changes within the mental health system (from fee-for-service to a managed care model) and the impact of these changes on clinical outcomes, financial outcomes, and the satisfaction of various stakeholders; an evaluation of a school-based counseling program for primary and intermediate school students; an evaluation of the impact of mental health and case management services on quality of life in a sample of chronically mentally ill clients; and an evaluation assessing the potential benefits and feasibility of integrating medical and behavioral healthcare for chronically mentally ill clients
- Responsibilities included conducting literature searches and reviews, facilitating focus groups for needs assessment, leading evaluation planning meetings,

developing research methodology, selecting and designing data collection instruments, developing and coordinating data entry systems, supervising data entry personnel, conducting statistical analyses, writing research protocols and evaluation reports, and writing grant proposals

9/92 – 8/96

Research Assistant: Sleep Research Laboratory, Psychology Department
University of Arizona, Tucson, Arizona

- Participated in various clinical research studies, including investigations of the effects of dairy products and personality on sleep in the elderly, and of the differential efficacy of progressive muscle relaxation and paradoxical interventions for insomnia
- Responsibilities included conducting polysomnographic recordings, conducting interviews and administering questionnaires, scoring sleep records, consolidating and managing large databases, conducting statistical analysis of data, and supervising undergraduate research assistants

1/92 – 9/92

Research Assistant: Palo Alto Veterans Administration Medical Center
Sleep Research Laboratory, Palo Alto, California

- Research included studies of schizophrenic, depressive, and personality disordered patients, as well as normal control subjects
- Responsibilities included collection of psychological and physiological data, conduction of all-night polysomnographic recordings, conduction of multiple sleep latency tests, structuring activities and engaging patients in these activities during sleep deprivation studies, computer processing of EEG data, scoring of sleep records, and database management

9/90 – 1/92

Research Assistant: Palo Alto Veterans Administration Medical Center, Palo Alto, California
Study: “Predictors of Adverse Outcomes in Hospitalized Elderly Veterans”

- In this study of hospitalized veterans aged 65 and over, responsibilities included patient recruitment, administering measures of psychological and physical functioning, abstracting data from patient medical charts, scheduling and conducting follow-up interviews, managing a large database, conducting literature reviews, and writing sections of the final grant report and article manuscripts

12/89 - 9/90

Research Assistant: Stanford University Medical Center, Stanford, California
Study: “Efficacy of Physical Therapy in Hospitalized Geriatric Patients”

- During the pilot phase of this large, multi-center study, primary responsibilities included determining eligibility criteria for patient recruitment, collaborating on the development of a measure of physical functioning for hospitalized elderly patients, collaborating with hospital administration to assure that all necessary reports were delivered each day, and writing large sections of the operations manual
- When primary data collection began, responsibilities included recruiting patients, abstracting chart information, conducting interviews and administering questionnaires, assessing physical functioning, and scheduling and conducting follow-up interviews

8/89 - 4/90

Research Assistant: Department of Psychology, University of California at Berkeley, Berkeley, California

- Worked for a doctoral candidate in clinical psychology
- Maintained large data sets, and developed SPSS programs which generated subscale scores for a variety of different questionnaires

9/88 - 12/88

Research Assistant: Anacapa Sciences, Santa Barbara, California
(Anacapa Sciences is a behavioral science research firm specializing in human factors research.)

- Responsibilities included assisting in the development of the research design, conducting literature reviews, administering questionnaires, conducting interviews, and writing sections of the final report for Chrysler Corporation

6/88 - 8/88

Research Assistant, Stanford University, Department of Psychology, Stanford, CA

- Worked for a doctoral candidate in personality psychology
- Primary responsibility was coding a large amount of thought-sampling data

Paper Presentations, Seminars & Workshops, & Technical Reports

Paper

Presentations: Shapiro, Cheri, Sege, Robert, Rider, Steven, Teel, Kay. Implementing and Evaluating Innovative Approaches to Supporting Families of Young Children: Lessons from the Quality Improvement Center on Early Childhood. Presented at the 19th Annual National Conference on Child Abuse and Neglect, New Orleans, LA, April, 2014.

Parsons, Beverly, Brodowski, Melissa, Moore, Marah, Harper Brown, Charlyn, Rider, Steven, Winters, Katie. Evaluating the Use of Evidence-Based Principles across the Social Ecology. Panel Presentation at the 27th Annual Conference of the American Evaluation Association, Washington, DC, October 2013.

Rider, Steven, Winters, Katie. Wheeler, Regina. ASNS Student Focus Group Report. A report produced for Kapi'olani Community College. January, 2013.

Seymour, Jim, Rider, Steven, Graves, Joshua, Casey, Maureen. Fostering Hope: Reducing Child Maltreatment Through Collective Impact. Presented at the 2013 Catholic Charities USA Annual Meeting, San Francisco, CA, September, 2013.

Rider, Steven, Winters, Katie. Fostering Hope: An Innovative Approach to Child Maltreatment Prevention. Presented at the 10th Triennial International Child and Youth Care Conference, Canmore, Alberta, Canada, October, 2012.

Rider, Steven, Winters, Katie. Lyle, Kelsey. STEM Enterprise Key Informant Summary. A report produced for Kapi'olani Community College. November, 2012.

Rider, Steven, Winters, Katie, Prescott, Victoria. Participatory Evaluation and Planning: Engaging Collaborative Partners through Issue-Focused Data Sharing in a Place-based, Federally-funded Research and Demonstration Project. Presented at the 18th Annual National Conference on Child Abuse and Neglect, Washington, DC, April, 2012.

Sege, Robert, Shapiro, Cheri, Rider, Steven, Teel, M. Kay. The QIC-EC Projects: Building Protective Factors, Promoting Optimal Development, Reducing Risk for Maltreatment. Presented at the 18th Annual National Conference on Child Abuse and Neglect, Washington, DC, April, 2012.

Rider, Steven. Fostering Hope: Research Design and Early Findings. Presented at the Strengthening Families 2011 Leadership Summit, Arlington, VA, June, 2011.

Song, Jin, Pickett, Dianna, Rider, Steven, Atwater, Rachel, Wilcox, Cate, and Bradley, Katherine. Improving the health and safety of children in Oregon's child care: An evaluation of the Oregon Child Care Health Consultation demonstration program. Presented at the 65th annual meeting of the Oregon Public Health Association, October, 2009.

Rider, Steven. Supporting Family, Friend and Neighbor Caregivers: Literacy Kits. Presented at the 15th Annual Oregon Child Care Researchers Roundtable, Troutdale, OR, October 2009.

Mueller, Erin, Becker, Kristen, and Rider, Steven P. Challenges and Benefits of Using a Highly Collaborative Approach to Evaluate an Innovative Child Care Health Consultation Program. Presented in Multipaper Session 246, at the Annual Conference of the American Evaluation Association, Portland, OR, October, 2006.

Rider, Steven, P., Leffingwell, Thad, R., & Williams, Jean, M. The transtheoretical model and sport psychology consultation: Rationale and preliminary findings. Presented at the Annual Meeting of the Association for the Advancement of Applied Sport Psychology, Williamsburg, VA, October, 1996.

Manber, R., Schley, S., Kiel, S., Pardee, R., Rider, S., Marion, S., Shaheed, C., Kuo, T., & Bootzin, R. Progesterone and sleep: A pilot study. Presented at the Annual Meeting of the 2nd International Congress of the World Federation of Sleep Research Societies. Nassau, The Bahamas, September, 1995.

Rider, Steven, P., Bootzin, Richard, R., & Leffingwell, Thad, R. Sleep, mood, and performance in intercollegiate swimmers. Presented at the Annual Meeting of the Sleep Research Society, Nashville, TN, June, 1995.

Bootzin, Richard, R., Bell, Iris, R., Halbisch, R., Kuo, Tracy, F., Wyatt, James, K., Rider, Steven, P., & Manber, Rachel. Night-to-night variability in measures of sleep and sleep disorders: A six-night PSG study. Presented at the Annual Meeting of the Sleep Research Society, Nashville, TN, June, 1995.

Manber, Rachel, Pardee, Roy, E., Bootzin, Richard, R., Kuo, Tracy, F., Rider, Allison, M., Rider, Steven, P., & Bergstrom, L. Changing sleep patterns in adolescence. Presented at the Annual Meeting of the Sleep Research Society, Nashville, TN, June, 1995.

Manber, Rachel, Pardee, Roy, E., Bootzin, Richard, R., Kuo, Tracy, F., Rider, Allison, M., Rider, Steven, P., & Bergstrom, L. The relationship between sleepiness and sleep-patterns in three cohorts of students. Presented at the Annual Meeting of the Sleep Research Society, Nashville, TN, June, 1995.

Wyatt, James, K., Bootzin, Richard, R., Bell, Iris, R., Kuo, Tracy, F., Anthony, Jennifer, L., & Rider, Steven, P. First night effects across multiple two-night recordings in older adults. Presented at the Annual Meeting of the Sleep Research Society, Nashville, TN, June, 1995.

Kuo, Tracy, F., Bootzin, Richard, R., Bell, Iris, R., Wyatt, James, K., Rider, Steven, P., & Anthony, Jennifer, L. Normative sleep characteristics in the elderly: A six-night PSG study. Presented at the Annual Meeting of the Sleep Research Society, Nashville, TN, June, 1995.

Rider, Steven, P. Effects of a repressive coping style on self-reported mood benefits following acute exercise. Presented at the Southwest Regional Student Conference on Sport Psychology, Tucson, AZ, January, 1995.

Ludwig, C., Valdiserri, M., Baldwin, D., Rider, S., Wyatt, & J. Bootzin, R. Individual difference correlates of the extent of agreement between wrist actigraphy and sleep diaries for insomniacs. Presented at the Annual Meeting of the Sleep Research Society, Boston, MA, June, 1994.

Bootzin, Richard, R., Wyatt, James, K., Bell, Iris, R., Rider, Steven, P., & Schou, D. The effect of milk on cognitive processing in shy and outgoing older adults. Presented at the Annual Meeting for the Society of Behavioral Medicine, Boston, MA, April, 1994.

Rider, Steven, P., & Williams, Jean, M. Effects of acute exercise on positive and negative states of mind. Presented at the Annual Meeting of the Association for the Advancement of Applied Sport Psychology, Montreal, Quebec, Canada., October, 1993.

Rider, Steven, P., & Williams, Jean, M. Effects of repression on the psychological benefits of exercise. Presented at the Annual Meeting of the Association for the Advancement of Applied Sport Psychology, Montreal, Quebec, Canada., October, 1993.

Rider, Steven, P. Stress, coping, and injuries in high school basketball players. Presented at the Annual Meeting of the Western Psychological Association, Phoenix, AZ, April, 1993.

Rider, Steven, P., Lexcen, Fran., Sarnikowski, Scott., & Hicks, Robert. Sleep quality in active, passive, former, and non-smokers. Presented at the Annual Meeting of the Western Psychological Association, Portland, OR, April, 1992.

Rider, Steven, P., Lexcen, Fran, Sarnikowski, Scott, & Hicks, Robert. Effects of active and passive exposure to smoke on symptoms and attitudes. Presented at the Annual Meeting of the Western Psychological Association, Portland, OR, April, 1992.

Lexcen, Fran, Rider, Steven, P., Sarnikowski, Scott, & Hicks, Robert. Effects of cigarette smoking on sleep quality. Presented at the Annual Meeting of the Western Psychological Association, Portland, OR, April, 1992.

Rider, Steven, P. Music as a distracter in problem solving. Presented at the Annual Meeting of the Western Psychological Association, Portland, OR, April, 1992.

Rider, Steven, P. Causal attributions in sport situations. Presented at the Annual Meeting of the Western Psychological Association, Reno, NV., April, 1989.

Seminars,
Workshops, &
Webinars:

Rider, Steven, Seymour, Jim. Key Findings and Next Steps Based on a 3-Year Study of the Fostering Hope Initiative. National Quality Improvement Center on Early Childhood Learning Network Webinar, February, 2014.

Rider, Steven, Junge, Heiko. Fostering Hope: Concentrating Services in High-Poverty Neighborhoods to Reduce Child Maltreatment. National Quality Improvement Center on Early Childhood Learning Network Webinar, June, 2010.

Rider, Steven, and Kelly, Nancy. Using Data for Program Management. Presented at the Safe Schools/Healthy Students National Conference, Washington, DC, January, 2009.

Rider, Steven, Shain, Mike, Dietsch, Barbara, Macias-Smith, Nancy, Wells, Kelly, and Zandlo-Hutchinson, Barb. Expectations and Roles of Project Directors and Evaluators. Presented at the Safe Schools/Healthy Students National Conference, Washington, DC, January, 2009.

Rider, Steven, Diehl, Dan, Shain, Mike, and Dietsch, Barbara. Best Practices and Challenges for Evaluators. Presented at the Safe Schools/Healthy Students National Conference, Washington, DC, January, 2009.

Rider, Steven, and Formica, Scott. Sustainable Approaches to Local Evaluation. Presented at the Safe Schools/Healthy Students Project Directors Consortia Meeting, Orlando, FL, January, 2009.

Dorsey, Karen, and Rider, Steven. Planning for the No Cost Extension Year. Presented at the Safe Schools/Healthy Students Project Directors Consortia Meeting, Orlando, FL, January, 2009.

Formica, Scott, and Rider, Steven. Local Evaluators: Collaborators or Observers? Presented at the Safe Schools/Healthy Students Project Directors Consortia Meeting, Orlando, FL, January, 2009.

Formica, Scott, and Rider, Steven. Working with Your Evaluator for Sustainability. Presented at the Safe Schools/Healthy Students Project Directors Consortia Meeting, Orlando, FL, January, 2009.

Rider, Steven. Pitfalls and Challenges in Evaluating Safe Schools/Healthy Students Projects. Presented at the Safe Schools/Healthy Students National Conference, Washington, DC, February, 2008.

Rider, Steven. Using Evaluation Data to Make Mid-Course Corrections. Presented at the Safe Schools/Healthy Students National Conference, Washington, DC, February, 2008.

Rider, Steven, Formica, Scott, and Wells, Michael. Working with Project Directors during No-Cost Extension. Presented at the Safe Schools/Healthy Students Project Directors National Conference, Albuquerque, NM, January, 2008.

Formica, Scott, and Rider, Steven. Process and Outcome Measures. Presented at the Safe Schools/Healthy Students Project Directors National Conference, Albuquerque, NM, January, 2008.

Rider, Steven, Formica, Scott, and Woy, Richard. Sustainable Data Collection and Data Management Systems. Presented at the Safe Schools/Healthy Students Project Directors National Conference, Albuquerque, NM, January, 2008.

Formica, Scott, and Rider, Steven. Problem Solving Regarding Data Collection. Presented at the Safe Schools/Healthy Students Project Directors National Conference, Albuquerque, NM, January, 2008.

Rider, Steven, Wang, Anne, and Small, Meg. Now That You Know Where You Are Going, How Will You Know If You Got There?: Developing Your Evaluation Plan. Presented at the Safe Schools/Healthy Students National Conference, Washington, DC., March, 2006.

Small, Meg, Rider, Steven, and Wang, Anne. Refining And Developing Evaluation Plans: A Critical Tool For Navigating The SS/HS Journey. Presented at the Safe Schools/Healthy Students National Conference, Washington, DC., March, 2006.

Formica, Scott, and Rider, Steven. Evaluation and Sustainability. Workshop conducted at the National Center for Mental Health Promotion and Youth Violence Prevention, June, 2005.

Rider, Steven, P. Evaluation Training and Technical Assistance. Presented at the Safe Schools/Healthy Students National Conference, Washington, DC, February, 2005.

Rider, Steven, P. Integrating Evaluation Data into the Semi-Annual Report. Presented at the Safe Schools/Healthy Students National Conference, Washington, DC, February, 2005.

Rider, Steven, P. and Williams, Kelly S. Evaluating Programs Designed for Targeted Populations. Presented at the Safe Schools/Healthy Students National Conference, Washington, DC, February, 2005.

Rider, Steven, P. Burlington School District Climate Survey Results. A presentation made to the Burlington (VT) School District Superintendent, district administrators, and school Principals, February, 2005.

Rider, Steven, P., & Mueller, Reed, M. Some Key Ingredients in Conducting Useful Evaluations. Training delivered at the National Safe Schools/Healthy Students Initiative conference. Dallas, TX, February, 2003.

Rider, Steven, P. & Jackson, Tammy. Measuring What Matters: Using Evaluation Results & Using Qualitative and Quantitative Data. Presented at the Safe Schools/Healthy Students National Conference, Tyson's Corner, VA., May, 2002.

Rider, Steven, P., & Jackson, Tammy. Integrating Project Management and Program Evaluation. Training delivered at the National Safe Schools/Healthy Students Initiative conference. Washington, DC, April, 2002.

Mueller, Reed, M., & Rider, Steven, P. Program Evaluation: Planning and Implementing an Evaluation. Training co-sponsored by the Clark County Department of Community Services and the Clark County Public Health and Safety Network. Vancouver, WA, June, 2001.

Rider, Steven, P., & Mueller, Reed, M. Thinking Clearly About Making a Difference: An Introduction to Logic Models. Training co-sponsored by the Clark County Department of Community Services and the Clark County Public Health and Safety Network. Vancouver, WA, April, 2001.

Mueller, Reed, M., & Rider, Steven, P. The Basics of Program Evaluation. Training co-sponsored by the Clark County Department of Community Services and the Clark County Public Health and Safety Network. Vancouver, WA, June, 2000.

Rider, Steven, P. Referral Patterns and Service Duplication in the Downtown Portland Homeless Youth System. Presentation to the Homeless Youth Oversight Committee, Portland, OR, March, 2000.

Rider, Steven, P. Evaluation of the Downtown Portland Homeless Youth Service System: Preliminary Findings. Presentation to the Homeless Youth Oversight Committee, Portland, OR, January, 2000.

Rider, Steven, P. Evaluation of the Downtown Portland Homeless Youth Service System. Multnomah County "Evalfest", Portland, OR, June, 1999.

Rider, Steven, P. Program Evaluation: An Overview. Oregon Health Sciences University, Medical Psychology Seminar Series, Portland, OR, April, 1999.

Rider, Steven, P. Career Paths in Program Evaluation. Portland Veterans Administration Medical Center, Psychology Intern Seminar Series, Portland, OR, March, 1998.

Rider, Steven, P. Research Methods and Statistical Analysis Seminar Series. Multnomah County, Portland, OR, November, 1997 – July, 1998.

Technical
Reports:

Rider, Steven, Winters, Katie, and Neilson, Terra. Gateway to College Evaluation of Post-Secondary Attainment – Graduates. A report produced for the Gateway to College National Network. June, 2012.

Rider, Steven, Winters, Katie, and Neilson, Terra. Gateway to College Evaluation of Post-Secondary Attainment – Non-Completers. A report produced for the Gateway to College National Network. June, 2012.

Thurman, Carol, and Rider, Steven. Additional Learning Opportunities – Year 1 Evaluation. A report produced for the Chicago Public Schools. July, 2011.

Rider, Steven, Becker, Kristen, and Stevens, Kimberly. Teacher Institute for the Experience of Science – Year 1 Program Evaluation Results. A report produced for the Oregon Health & Sciences University. January, 2008.

Atwater, Rachel, Stevens, Kimberly, and Rider, Steven. ACCESS Alternative Program Evaluation Report. A report produced for the Portland Public School District. September, 2007.

Rider, Steven, Neely, Tia, and Atwater, Rachel. Benton Franklin Educational Service District #123 Final Evaluation Report. A report produced for the Benton Franklin ESD 123 Safe Schools/Healthy Students Initiative, November, 2006.

Rider, Steven, P. and Jackson, Tammy. Portland Public School District Safe Schools/Healthy Students Initiative. A monograph produced for the United States Departments of Health and Human Services, Education, and Justice, March, 2005.

Damaré, Michelle, and Rider, Steven. District of Columbia Public Schools Safe Schools/Healthy Students Initiative - Final Evaluation Report. A report produced for the United States Departments of Health and Human Services, Education, and Justice, January, 2005.

Rider, Steven, Mueller, Reed, Mueller, Erin, Lynch, Meghan, Neely, Tia, and Atwater, Rachel. Portland Public School District Safe Schools/Healthy Students Initiative - Final Evaluation Report. A report produced for the United States Departments of Health and Human Services, Education, and Justice, December, 2004.

Mueller, Erin, A. and Rider, Steven, P. Child Care Health Consultation Demonstration Program Phase 1 Final Report. A report produced for the Oregon State Department of Human Services, July, 2004.

Rider, Steven, P. and Jackson, Tammy. Portland Public School District Safe Schools/Healthy Students Initiative: Evaluation Symposium Abstract. A report produced for the United States Departments of Health and Human Services, Education, and Justice, June, 2004.

Mueller, Erin, A. and Rider, Steven, P. Partners for Character: Mid-Year Evaluation Report. A report prepared for the Department of Education's Office of Safe and Drug-Free Schools, May, 2004.

Atwater, Rachel, Neely, Tia, and Rider, Steven, P. Evaluation of the Oregon Department of Education's Public Charter School Incentive Grant Program: Oregon Operational Charter Schools. A report produced for the Oregon State Department of Education, April, 2004.

Rider, Steven, P., and Damaré, Michelle, M. The Aggression Replacement Training Program and Special Education Referrals in the Washington DC Public Schools: Preliminary Data Analysis and Recommended Evaluation Strategies. A report produced for the Washington DC Public Schools District's Safe Schools/Healthy Students Initiative, January, 2004.

Mueller, Erin, A., and Rider, Steven, P. Child Care Health Consultation Demonstration Program Interim Report. A report produced for the Oregon State Department of Human Services, December, 2003.

Rider, Steven, P. Portland Public Schools Discipline Materials Redesign Project Focus Group Summary. A report produced for the Portland Public School District's Safe Schools/Healthy Students Initiative, November, 2003.

Rider, Steven, P., and Damaré, Michelle, M. Initial Outcomes for the Aggression Replacement Training Program in the Washington DC Public Schools. A report produced for the Washington DC Public Schools District's Safe Schools/Healthy Students Initiative, October, 2003.

Rider, Steven, P. Quality of the Partnership in the Safe Schools/Healthy Students Initiative. A report produced for the Portland Public School District's Safe Schools/Healthy Students Initiative, June, 2002.

Rider, Steven, P. A comparison of the FAST and Family Engagement Program at Tualatin Valley Centers. A report produced for the Portland Public School District's Safe Schools/Healthy Students Initiative, June 2002.

Rider, Steven, P. & Lynch, Meghan. Safe Schools/Healthy Students: Middle School Parent Project - Second Year Outcomes. A report produced for the Portland Public School District's Safe Schools/Healthy Students Initiative, June, 2002.

Rider, Steven, P., McAdam, Meghan. Student Attendance Initiative – 2000-01 Final Report. A report produced for the Portland Public School District's Safe Schools/Healthy Students Initiative, October, 2001.

Rider, Steven, P. Student Mental Health Services in 2000-01: Risk Factors and Academic Outcomes. A report produced for the Portland Public School District's Safe Schools/Healthy Students Initiative, October, 2001.

Rider, Steven, P., McAdam, Meghan. Service Integration Report for the 2000-01 Academic Year. A report produced for the Portland Public School District's Safe Schools/Healthy Students Initiative, October, 2001.

McAdam, Meghan, & Rider, Steven, P. District Disciplinary Practices. A report produced for the Portland Public School District's Safe Schools/Healthy Students Initiative, October, 2001.

Rider, Steven, P. Middle School Parent Involvement Project. A report produced for the Portland Public School District's Safe Schools/Healthy Students Initiative, October, 2001.

McAdam, Meghan, & Rider, Steven, P. Campus Crime Stoppers: 2000-01. A report produced for the Portland Public School District's Safe Schools/Healthy Students Initiative, October, 2001.

Mueller, Reed, M., & Rider, Steven, P. Portland Public School District's Student Discipline System. A report produced for the Portland Public School District's Safe Schools/Healthy Students Initiative, October, 2001.

Rider, Steven, P., McAdam, Meghan. Student Attendance Initiative Interim Data Report. A report produced for the Portland Public School District's Safe Schools/Healthy Students Initiative, June, 2001.

Rider, Steven, P. Issues in Data Interpretation. A report produced for the Multnomah County Early Childhood Mental Health Unit, May, 2001.

Rider, Steven, P. Survey Methods Overview. A report produced for the Multnomah County Early Childhood Mental Health Unit, May, 2001.

Rider, Steven, P., McAdam, Meghan. Student Assistance Team Report. A report produced for the Portland Public School District's Safe Schools/Healthy Students Initiative, April, 2001.

Rider, Steven, P. Evaluation of the Downtown Portland Homeless Youth Services Continuum. A report produced for the Multnomah County Department of Community and Family Services, January, 2001.

Mueller, Reed, M., Rider, Steven, P. ParentCare: Outcome and Client Satisfaction Results. A report produced for ParentCare, Inc., May, 2000.

Rider, Steven, P., and Watts, Bruce. African American Contractor Survey. A report produced in collaboration with the Coalition of Black Men and the City of Portland, April, 2000.

Rider, Steven P., Landry, Arlene. Satisfaction with Contracted Mental Health and Alcohol and Drug Services: A Survey of DCFCS and DCJ Staff. Multnomah County, Portland, OR, February, 2000.

Rider, Steven, P., Mueller, Reed, M. An Evaluation of "The Night Harry Stopped Smoking". A report produced for the American Cancer Society and the Portland Opera, September, 1999.

Mueller, Erin, M., Mueller, Reed, M., Rider, Steven, P. An Evaluation of the Alternative Pathways School-to-Work project. A report produced for Worksystems, Inc., September, 1999.

Rider, Steven, P. InAct, Inc. Employee Satisfaction Survey Results. Report produced for InAct, Inc., June, 1999.

Rider, Steven, P. Evaluation Plan for the Downtown Portland Homeless Youth Service System. Multnomah County, Portland, OR, May, 1999.

Mueller, Reed, M., and Rider, Steven, P. ParentCare: Early Outcomes and Client Satisfaction. A report produced for ParentCare, Inc., February, 1999.

Rider, Steven, P., Smith, Brian, Samolinski, Peggy. An Evaluation of the Portland Impact Integrated Service Model. Multnomah County, Portland, OR, December, 1998.

Rider, Steven, P. Multnomah County Youth Investment Services System Evaluation Report. Multnomah County, Portland, OR, January, 1998.

Rider, Steven, P., Samolinski, Peggy. Parent Child Development Services: Parent Survey Preliminary Report. Multnomah County, Portland, OR, October, 1997.

Journal Articles & Book Chapter

Journal

Articles:

Rider, S., Winters, K., Dean, J., & Seymour, J. (in press). Fostering Hope: A neighborhood-based, Collective Impact Initiative. Exploring New Paradigms for Evaluation and Service Delivery: The National Quality Improvement Center on Early Childhood. *Zero to Three*.

Shugerman, S.R., Moss, G.B., Marriott, L.K., Ault Jr., C.R., Bailey, P., Rider, S., Zimmerman, K., and Cameron, W.E. Teacher Institute for the Experience of Science (TIES) Improves Teacher Understanding of Biomedical Research. Submitted for review at The Journal of Research in Science Teaching.

Leffingwell, Thad, R., Rider, Steven, P., & Williams, Jean, M. (2001). Application of the Transtheoretical Model to psychological skills training. *The Sport Psychologist*, 15, 168-187.

Bell, Iris, R., Bootzin, Richard, R., Ritenbaugh, C., Wyatt, James, K., DeGiovanni, G., Kulinovich, T., Anthony, J. L., Kuo, Tracy, F., Rider, Steven, P., Peterson, Julie, M., Schwartz, Gary, E., & Johnson, K. A. (1996). A polysomnographic study of sleep disturbance in community elderly with self-reported environmental chemical odor intolerance. *Biological Psychiatry*, 40, 123-133.

Rider, Steven, P., & Hicks, Robert. (1995). Stress, coping, and injuries in high school basketball players. *Perceptual and Motor Skills*, 81, 499-503.

Book

Chapter:

Bootzin, Richard, R., & Rider, Steven, P. (1997). Behavioral techniques and biofeedback for insomnia. In M. R. Pressman & W. C. Orr (Eds.), *Understanding sleep: The evaluation and treatment of sleep disorders* (pp. 315-338). Washington, D. C.: American Psychological Association.

Teaching Experience

- 1/96 - 5/96 Teaching Assistant: Psychology Department, University of Arizona. Tucson, Arizona
Psychology 230: Psychological Measurement and Statistics
- Responsible for grading homework, grading exams, and holding office hours
- 1/96 - 5/96 Teaching Assistant: Psychology Department, University of Arizona. Tucson, Arizona
Psychology 360: Abnormal Psychology
- Responsible for grading exams and essays
- 10/95 Guest Lecturer: Psychology Department, University of Arizona, Tucson, Arizona
Psychology 622: Principles of Behavior Therapy
- Lectured on and demonstrated relaxation techniques used in the treatment of various psychology and physical disorders
 - Also covered behavioral techniques used in athletic performance enhancement
 - Psychology 622 is a graduate course for clinical psychology students
- 8/95 - 12/95 Teaching Assistant: Psychology Department, University of Arizona. Tucson, Arizona
Psychology 230: Psychological Measurement and Statistics
- Responsible for grading homework, developing tests, holding office hours, and conducting comprehensive review sessions before each exam
- 6/95 - 7/95 Instructor: Psychology Department, University of Arizona. Tucson, Arizona
Psychology 230: Psychological Measurement and Statistics
- Taught introductory statistics class of 53 students
 - Chose textbook, developed syllabus and exams, lectured 12 hours per week
 - Covered theoretical and applied aspects of descriptive and inferential statistics including central tendency, variability, probability, hypothesis testing, correlation and regression, t-test, analysis of variance, and chi-square
- 1/95 - 5/95 Teaching Assistant: Psychology Department, University of Arizona. Tucson, Arizona
Psychology 290: Research Methods
- Responsible for providing periodic lectures, overseeing and advising students' research projects, conducting comprehensive review sessions before each exam, grading written reports of research projects, and grading exams
- 6/94 - 7/94 Instructor: Psychology Department, University of Arizona. Tucson, Arizona
Psychology 230: Psychological Measurement and Statistics
- Taught introductory statistics class of 48 students
 - Chose textbook, developed syllabus and exams, lectured 12 hours per week
 - Covered theoretical and applied aspects of descriptive and inferential statistics including central tendency, variability, probability, hypothesis testing, correlation and regression, t-test, analysis of variance, and chi-square
- 1/94 - 5/94 Teaching Assistant: Psychology Department, University of Arizona. Tucson, Arizona
Psychology 230: Psychological Measurement and Statistics
- Responsible for grading homework, developing tests, and holding office hours

6/93 - 7/93 Teaching Assistant: Psychology Department, University of Arizona. Tucson, Arizona
Psychology 290: Research Methods

- Responsible for lecturing four hours per week in the laboratory section of the class, overseeing and advising students' research projects, grading written reports of research projects, and grading homework and exams

9/92 - 5/93 Instructor: Psychology Department, University of Arizona. Tucson, Arizona
Psychology 102: Topics in Psychology

- Responsible for developing syllabus, establishing grading system, developing and giving all lectures, grading homework assignments, and assigning final grades

Professional Affiliations

American Evaluation Association
Oregon Program Evaluators Network



Kristi Manseth (Zimmerman), Ph.D.

Pacific Research and Evaluation, LLC
3507 SW Corbett Avenue
Portland, Oregon 97239
Phone: (503) 595-3970
Fax: (503) 595-3974
Email: Kristi@Pacific-Research.org

Education

- 2009 Ph.D.: Industrial Organizational Psychology
Portland State University, Portland, Oregon
- 2008 Master of Science: Industrial Organizational Psychology
Portland State University, Portland, Oregon
- 2005 Bachelor of Arts: Psychology
Purdue University, West Lafayette, Indiana

Professional Experience

- 4/10 – Present Research Associate: Pacific Research & Evaluation, LLC, Portland, Oregon
- Developing and monitoring data collection tools and procedures
 - Conducting computer and library literature searches
 - Locating and contacting recipients of services, providers of services, and other stakeholders to facilitate data collection, including scheduling and conducting interviews, focus groups, and written surveys
 - Developing and managing various databases for PRE evaluation projects
 - Entering, cleaning, and coding data
 - Conducting statistical analysis of data using Access, Excel, and SPSS
 - Writing evaluation reports
 - Writing evaluation plans and proposals
 - Attending local, state, and federal conferences
 - Coordinating and directing work as necessary with PRE staff, PRE clients, and relevant stakeholders
 - Other duties as assigned, including word processing, copying, filing, mailing, scheduling, and other administrative duties
- 6/09 – 3/10 Research Associate/Intervention Specialist: Center for Work-Family Stress, Safety and Health, Portland, Oregon

- Worked on a team of researchers at PSU and within OHSU's Center for Research on Occupational and Environmental Toxicology, specifically focusing on two key components of the intervention: Computer Based Training and an electronic behavior tracking application. Was responsible for aiding in the development, implementation and evaluation of these training components.

- 9/05 – 6/09 Research Assistant: Center for Work-Family Stress, Safety and Health, Portland, Oregon
 - Developed surveys and collected data
 - Cleaned data and analyzed organizational and health related outcome
 - Developed Work-Life Supervisor Support Training Intervention
 - Evaluated Work-Life Supervisor Support Training Intervention
 - Co-authored various publications and presentations stemming from this research grant

- 3/08 – 4/09 Learning and Development Coordinator: Port of Portland, Portland, Oregon
 - Provided support for the development and implementation of employee and managerial training courses
 - Provided consultation and support for various OD initiatives including an organizational-wide change management initiative, performance management systems, and varying levels of survey development and analysis

- 9/07 – 4/08 Survey Consultant: Pyramid Breweries Inc, Portland, OR
 - Met with Pyramid HR to develop an employment engagement survey for all Pyramid employees
 - Created a data collection instrument
 - Cleaned and analyzed data
 - Developed a professional feedback report including recommendations for increasing levels of employee engagement

- 9/07 – 12/07 Research Support: Momentum Market Intelligence, Portland, OR
 - Designed and tested surveys
 - Assisted in the data analysis, design, and checking of final client research reports

Publications & Presentations

Publications: Shugerman, S.R., Moss, G.B., Marriott, L.K., Ault Jr., C.R., Bailey, P., Rider, S., Zimmerman, K., and Cameron, W.E. Teacher Institute for the Experience of Science (TIES) Improves Teacher Understanding of Biomedical Research. Submitted for review in 2012 at The Journal of Research in Science Teaching.

Zimmerman, K.L., Hammer, L.B. (2010). Positive Spillover: Where have we been and where are we going? In Houdmont, J. & Leka, S. (Eds). *Contemporary occupational health psychology: Global perspectives on research, education, and practice* (Vol. I). Chichester, England: Wiley-Blackwell.

Hammer, L.B., Zimmerman, K. (2009). Quality of work life. In Zedeck, S. (Ed). *Handbook of Industrial Organizational Psychology*.

Hammer L.B., Kossek, E.E., Anger, W.K., Bodner, T., Zimmerman, K. (Forthcoming). A Quasi-Experimental Field Study Evaluation of a Work-Family Intervention to Increase Family Supportive Supervisor Behaviors (FSSB), *Journal of Applied Psychology*.

Hammer, L. B., Kossek, E. E., Zimmerman, K., & Daniels, R. (2007). Clarifying the construct of family supportive supervisory behaviors (FSSB): A multilevel perspective. In P. L. Perrewe and D. C. Ganster (Eds.). *Research in occupational stress and well-being* (Vol. 6, pp. 171-211). Amsterdam: Elsevier Ltd.

Zimmerman, K., Hanson, G., Yragui, N. & Hammer, L. (2006). Report on Portland State Employee's Work-Life Balance. Unpublished technical report. Portland State University.

Presentations: Zimmerman, K., Hammer, L.B., Kossek, E.E. (2009). *Operationalizing the Antecedents of Work-Family Positive Spillover: A longitudinal Study*. To be presented at the biennial International Conference on Stress and Health, San Juan, PR, November.

Wated, G., Bunk, J., Bulger, C., Zimmerman, K.L. (2009). *Academics and Practitioners' Perspectives on Transferring OHP-Related Knowledge*. Roundtable discussion at the biennial International Conference on Stress and Health, San Juan, PR, November.

Zimmerman, K., Hammer, L.B. (2007). *The Effects of a Family Supportive Culture on the Relationship between Work-Family Conflict and Burnout in Teachers*. Presented at the biennial International Conference on Stress and Health, Washington D.C, March.

Hammer, L. B., Kossek, E.E., Anger, K.W., Zimmerman, K. (2007). *Evaluation of a Work-Life Supervisor Support Training Intervention to Affect Worker Health*. Presented at the Worklife National Symposium: Protecting and Promoting Worker Health, June.

Zimmerman, K.L., Foster, J.B. (2005) *College Recruitment and Perceptions of Work-Family Conflict*. Poster presented at the Midwestern Psychological Association, May.

Teaching Experience

9/08 – 12/09 Instructor: Portland State University, Portland, Oregon

- Organizational Psychology Course: '08-'09 academic year (1 class for 3 quarters)
- Organizational Behavior: Fall '09 (1 class for 1 quarter)

Professional Affiliations

Society for Industrial Organizational Psychology (SIOP)
Society for Human Resource Management (SHRM)
Society for Occupational Health Psychology (SOHP)
Portland Industrial Organizational Psychology Association (PIOPA)

Julie Murphy, MSW

Pacific Research and Evaluation, LLC
3507 SW Corbett Avenue
Portland, Oregon 97239
Phone: (503) 595-3970
Fax: (503) 595-3974
Email: Julie@Pacific-Research.org

Education

- 1997 Master of Social Work- Administration Major and Evaluation Minor
University of Michigan, Ann Arbor, Michigan
- 1991 Bachelor of Arts – Sociology Major
Washington University in St. Louis, St. Louis, Missouri

Professional Research Experience

12/14 – Present Research Associate: Pacific Research & Evaluation, LLC, Portland, Oregon

- Providing oversight and guidance for all aspects of these evaluations, including developing and assuring successful completion of evaluation plan.
- Partnering with clients to clarify programmatic goals and develop logic models.
- Designing data collection instrumentation such as surveys, focus group protocols and key informant interview guides.
- Working with clients and program staff to obtain secondary data.
- Guiding the analysis process and disseminating study findings in both written and presentation formats .
- Providing ongoing communication and relationship with program managers and other key stakeholders.

4/98 – 11/14 Research Associate: Human Services Research Institute (HSRI), Portland, Oregon

- Served as the Evaluation Manager and Director on a number of federally funded child welfare demonstration projects, including evaluations of Ohio’s Title IV-E Waiver, Differential Response, Kinship Navigator, a Regional Partnership grant in Summit County Ohio, and Colorado’s Title IV-E Waiver.
- Designed evaluation methodologies using both qualitative and quantitative methods to conduct process, outcomes, and cost studies.
- Designed and implemented two random control trials and contributed to several federal cross-site evaluations.
- Designed data collection tools including web-based surveys and interview/focus group protocols.
- Developing and implementing data analysis plans and overseeing administrative and primary data collection efforts.

- Developed processes to track data reliability and completeness.
- Conducted site visits including interviews with state-level staff, county-level directors, managers, supervisors, and line staff, and focus groups with caregivers, youth, and community partners.
- Utilized a variety of evaluation methods to measure implementation, fidelity, and changes in collaborative relationships to understand practice changes at the case- and system-level.
- Developed multiple dissemination approaches including comprehensive interim and final reports, summary documents, and presentations for numerous conferences and other forums at the local, state, and federal level.
- Provided project management including project coordination, budgeting, contracting, and relationship development with program staff to respond to specialized needs.
- Supervised HSRI evaluation staff and subcontractors.

1/97-12/97 Social Work Practicum: University of Michigan Health Systems: Department of Social Work

- Evaluated a statewide Maternal Support Services program.
- Conducted Quality Assurance projects concerning the student program and compliance with mandatory trainings.
- Participated in a national research study to assess changes in the structure of hospital social work departments. Duties included survey design, coding, and data analysis.

9/96-12/97 Research Assistant: Poverty Research & Training Center, Ann Arbor, MI

- Conducted interviews with county welfare directors throughout Michigan.
- Coded and analyzed data from individual interviews and focus groups.
- Conducted literature review and assisted in research related to welfare reform.

Direct Service Experience

11/91-11/92 Volunteer Coordinator: Retired Senior Volunteer Program (RSVP): Cardinal Ritter Institute, St. Louis, MO

6/91-8/91 Home Visitor: Missouri Energycare, Inc., St. Louis, MO

6/96-8/96 Special Project Assistant: Oregon Health Division, Portland, OR

6/90-8/90 Intern: United South End Settlements, Boston, MA

6/90-8/90 Intern: North Shore Community Action Program, Peabody, MA

Publications and Presentations

- Reports: Murphy, Julie and Newton-Curtis, Linda. STARS Site Visit, March 2014 Summary Report. HSRI Contract Report, April, 2014.
- Murphy, Julie, Newton-Curtis, Linda, and Kimmich, Madeleine. Ohio Differential Response SOAR Project: Final Report; HSRI Contract Report, November, 2013.
- Murphy, Julie and Firth, Kimberly. Ohio's Fostering Connection Grant: Enhanced Kinship Navigator Project: Final Report; HSRI Contract Report, 2012.
- Murphy, Julie, Newton-Curtis, Linda Ohio SOAR Project: Year 1 Site Visit Report", HSRI Contract Report, 2011.
- Murphy, Julie. Oregon Independent Living Programs Program Review Findings: 2007-2008; HSRI Contract Report, 2008.
- Kimmich, Madeleine, Murphy, Julie and Zell, Adrienne. Analysis of Oregon's Drug and Alcohol Treatment & Preventions System; HSRI Contract Report, 2008.
- Kimmich, Madeleine, et. al. Final Comprehensive Report: Evaluation of Ohio's Title IV-E Waiver Demonstration Project "Protect Ohio"; HSRI Contract Report, 2008.
- Presentations: Evaluating Implementation in a Multi-Faceted Child Welfare Initiative. American Evaluation Association National Conference, Denver, CO, 2014.
- Measuring Family Engagement in Child Protective Services: Is Differential Response Really Different from Traditional Practice. American Evaluation Association National Conference, Denver, CO, 2014.
- Examining Outcomes of Differential Response: Results from Three Randomized Controlled Trials in Colorado, Illinois, and Ohio, National Child Abuse and Neglect Conference, New Orleans, LA (April, 2014)
- Results from the Evaluation of Ohio's Six County Alternative Response (SOAR) Project, 8th annual QIC-DR Conference, Plenary Session, Vail, CO, October, 2013.
- Family Engagement: Exploring Common Understanding and Methods to Assess Family Engagement, 8th annual QIC-DR Conference, Vail, CO, October, 2013.
- Symposium on DR and DR evaluation: Serving Ohio Families with Behavioral Health Issues Using a Differential Response Approach, 26th Annual Children's Mental Health Research & Policy Conference, Tampa, FL, March, 2013.
- The Family Voice in the Evaluation of Differential Response: Ohio's Preliminary Family Survey Findings, 7th annual QIC-DR Conference, Las Vegas, NV, November 2012.

Professional Affiliations

American Evaluation Association
Oregon Program Evaluators Network

Regina Wheeler, M.A.

Pacific Research and Evaluation, LLC
3507 SW Corbett Avenue
Portland, Oregon 97239
Phone: (503) 595-3970
Fax: (503) 595-3974
Email: Regina@Pacific-Research.org

Education

M.A. – Educational Psychology
University of Colorado, Boulder, Colorado

Post Baccalaureate – Psychology
Portland State University, Portland, Oregon

B. A. – Journalism; Concentration: News/Editorial and Public Relations
University of Oregon, Eugene, Oregon

Professional Experience

- 1/12 – Present Research Assistant: Pacific Research and Evaluation, LLC, Portland, Oregon
- Writing evaluation reports
 - Developing data collection tools
 - Conducting computer and library literature searches
 - Entering, cleaning, coding data using Excel and SPSS
 - Conducting statistical analysis of data using SPSS
 - Analyzing qualitative data
- 6/11-7/11 Research Intern: JVA Consulting, Denver, Colorado
- Researched best practices for out-of-school time activities for adolescents and presented a written report about the findings.
- 8/10 – 5/11 Board Member: Youth Opportunities Advisory Board (YOAB), Boulder, Colorado
- Mentored a diverse group of high school students on a leadership board.
 - Observed youth performing various activities and wrote a report related to adolescent cognitive development, which was presented to the group's adult liaison.
- 9/11 – 5/11 Seminar Facilitator: University of Colorado Education Department, Boulder, Colorado
- Organized and facilitated biweekly seminars for graduate students and faculty in the Educational Psychology department at the university.
- 12/09 – 4/11 Volunteer Reader and Volunteer Office Assistant: Reading to End Racism, Boulder, Colorado
- Read books concerning racism to students and initiated discussions with the youth regarding how they can help combat racial discrimination.

- 3/08-3/09 Research Assistant: Portland State University, Portland, Oregon
- Watched videos of children and assigned behavioral codes for a psychology research team studying prosocial and self-regulatory behavior in infants and toddlers.
 - Presented coding issues and contributed to discussions that led to new code definitions.
- 4/07-12/07 Public Relations Manager: Summerfield Homes, Forest Grove, Oregon
- Wrote press releases, content for the website, and print and television advertisements.
- 9/6-4/07 Public Relations Coordinator: Events Northwest, Lake Oswego, Oregon
- Worked with media to improve exposure for six clients.
- 12/04-1/06 Event Coordinator & Funds Development Assistant: Habitat for Humanity, Stanislaus, Modesto, California
- Organized and implemented four fundraising events, two of which generated 40% more revenue than in the previous year.
 - Supported the Executive Director in grant writing and wrote a grant that received funding.

Professional Affiliations

Oregon Program Evaluators Network (OPEN)
American Evaluation Association (AEA)



Lindy Wortman, B.S.

Pacific Research and Evaluation, LLC
3507 SW Corbett Avenue
Portland, Oregon 97239
Phone: (503) 595-3970
Fax: (503) 595-3974
Email: Lindy@Pacific-Research.org

Education

- | | |
|-------------------|--|
| Expected Dec 2015 | M.S. – Educational Leadership & Policy
Portland State University, Portland, Oregon |
| 2011 | B.S. – Psychology
Portland State University, Portland, Oregon |
| 2008 | Undergraduate coursework
California Polytechnic State University, San Luis Obispo, California |

Professional Experience: Research

- | | |
|-----------------|---|
| 04/15 – Present | <u>Research Assistant</u> : Pacific Research and Evaluation, LLC, Portland, Oregon <ul style="list-style-type: none">▪ Code, enter, and clean data using MS Word, MS Excel, and SPSS▪ Conduct statistical analysis of data using SPSS▪ Analyze qualitative data▪ Write evaluation reports▪ Manage data collection tools▪ Conduct and transcribe interviews |
| 08/14 – Present | <u>Research Assistant</u> : Graduate School of Education, Portland State University, Portland, Oregon <ul style="list-style-type: none">▪ Manage surveys using Qualtrics▪ Code and analyze data using axial coding to identify salient themes▪ Write up results for final article |
| 10/14 – Present | <u>Graduate Research Assistant</u> : Office of Institutional Research & Planning, Portland State University, Portland, Oregon <ul style="list-style-type: none">▪ Pull data from University server▪ Format data in Excel |
| 05/14 – 06/14 | <u>Data Entry Specialist</u> : Academic Advising, Portland Community College, Portland, Oregon <ul style="list-style-type: none">▪ Entered confidential student data into Excel▪ Engaged in discussion around data collection methods |

- 02/13 – 04/13 Research Assistant: Psychology Department, Portland State University, Portland, Oregon
- Supported data collection and entry
 - Collected baseline health data (heartrate, weight, blood pressure)
 - Attended weekly research meetings with graduate assistants & faculty
 - Entered data into SPSS
- 02/13 – 04/13 Research Assistant: Psychology Department, Portland State University, Portland, Oregon
- Transcribed audio files of interviews
 - Attended weekly research meetings with graduate assistants & faculty

Professional Experience: Education

- 05/09 – Present English Skills Tutor: (faculty since 2012), Student Learning Center, Portland Community College, Portland, Oregon
- Assist students with essay editing, structuring, and idea development
 - Present grammar and writing workshops each term
 - Train and mentor new tutors
- 10/14 – 03/15 General Adviser: Office of International Education, Portland Community College, Portland, Oregon
- Assisted students in creating an academic plan based on educational goals
 - Walked students through registration, late add, transfer, and payment policies
 - Helped students navigate immigration regulations
 - Connected students with on-campus resources
- 07/11 – 09/14 General & New Student Adviser: Portland Community College, Portland, Oregon
- Assisted students in creating academic plans
 - Gave overrides and placement based on previous coursework or AP/IB scores
 - Helped students navigate higher education policies and procedures
 - Supported student financial planning, including completion of FAFSA applications
 - Used the student information management system to track student progress
 - Gave campus tours detailing student resources and departments
- 06/13 – 06/14 Health Admissions Specialist: Portland Community College, Portland, Oregon
- Evaluated applications based on admissions criteria for closed entry health programs (Nursing, Radiography, Dental Sciences)
 - Assessed student coursework and helped students strategize to be competitive applicants
 - Supported students in creating financial aid timeframe extensions & academic plans
 - Conducted information sessions at PCC campuses and health fairs to recruit students
 - Looked up coursework transferability in school database
 - Gave overrides and placement based on previous coursework
 - Used student information management system to track student progress
 - Co-created learning contracts with students on academic probation
- 09/13 – 12/13 Derivative Calculus Class Lab Assistant: Portland Community College, Portland, Oregon
- Guided students through differential calculus material during lab
 - Clarified lab manual instructions and concepts
 - Organized and led study groups for the midterm and final

Certifications

2012 100 hour TESOL Certificate: Teaching English to Speakers of Other Languages

2011 100 hour CRLA Master Tutoring Certificate: College Reading and Learning Association

Presentation Experience

9/11 – Present Student Learning Center Workshops, Portland Community College, Portland, Oregon

- Essay Genres—Structures & Transitions
- Clear & To The Point—Parallelism & Repetition In Your Writing

6/13 – 6/14 Health Admissions Information Sessions, Portland Community College, Portland, Oregon

- Nursing
- Radiography
- Dental Assisting, Dental Lab Tech, Dental Hygiene



Sarah Campbell, B.A.

Pacific Research and Evaluation, LLC
3507 SW Corbett Avenue
Portland, Oregon 97239
Phone: (503) 595-3970
Fax: (503) 595-3974
Email: Sarah@Pacific-Research.org

Education

- 2012 B.A. – Psychology and Hispanic Studies
Lewis & Clark College, Portland, Oregon
- 2012 Council on International Educational Exchange Study Abroad Program
Santo Domingo, Dominican Republic
- 2011 Lewis & Clark College Overseas Program
East Africa

Professional Experience

- 6/12 – Present Research Coordinator: Pacific Research and Evaluation, LLC, Portland, Oregon
- Code, enter, and clean data using Remark OMR, MS Excel, and SPSS
 - Conduct statistical analysis of data using SPSS
 - Analyze qualitative data
 - Write evaluation reports
 - Conduct literature searches
 - Train and supervise data entry assistants
 - Format surveys and other data collection tools
 - Prepare data entry files
 - Complete other support tasks as needed, including making travel arrangements, ordering and purchasing supplies, and maintaining filing systems
- 1/11 – 5/12 Research Assistant, Early Childhood Development Project, Lewis & Clark College, Portland, Oregon
- Conducted research with participants, infants through age 7, in order to gain insight into emotion development, social cognition and understanding of intention
 - Coded, entered, cleaned, and analyzed data using SPSS
 - Created and delivered a poster presentation of data results
 - Assisted with writing final manuscript for Contributions to Preschool Social Cognition project

- 1/12 – 5/12 Office Assistant, Lewis & Clark College, Portland, Oregon
- Assisted with administrative tasks in the Biology-Psychology Department
- 2/11 – 6/11 Case Aid Intern, Child Protective Services, D.H.S., Portland, Oregon
- Supervised visitations, completed home visits, and attended court hearings
 - Wrote Child Adoption Summaries and completed other paperwork
- 5/10 – 8/10 Receptionist, Balanced Practice Yoga and Bodywork Studio, Sitka, Alaska
- Scheduled appointments, checked clients into classes, managed boutique retail, entered data, and organized and filed paperwork
 - Created an instruction manual for the position and trained a new receptionist
- 12/09 – 03/10 Alternative Spring Break Trip Leader, Lewis & Clark College, Portland, Oregon
- Organized school-sponsored Alternative Spring Break trip to San Francisco by contacting non-profit organizations, compiling a week-long itinerary, and designing curriculum to facilitate HIV/AIDS social work learning
 - Facilitated travel and supervised nine participants on week-long trip
- 11/08 – 5/09 Phonathon Caller, Lewis & Clark College, Portland, Oregon
- Contacted alumni, parents, and friends of the college to update records, improve relations, and request donations for the school

Teaching Experience

- 08/11 – 12/11 Escojo Mi Vida Instructor, Centro de Orientación e Investigación Integral, Santo Domingo, Dominican Republic
- Instructed a 12-week course in Spanish designed by the Peace Corps to train youth peer-educators in HIV and STI prevention, sexual education, and family planning
- 10/07 – 5/08 English Teacher, Netzahualcoyotl Bilingual School, Zihuatanejo, Mexico
- Created and instructed conversational English curriculum for indigenous children in a non-profit Mexican school

KRISTINA SMOCK

www.kristinasmockconsulting.com

kris@kristinasmockconsulting.com

PROFESSIONAL EXPERIENCE

Kristina Smock Consulting. *Portland OR.* Research and policy analysis for non-profit organizations, foundations, and government in the fields of poverty, social equity, and public policy. 7/96 - present.

Examples of work:

- **Meyer Memorial Trust** (Portland, OR): Conducted an evaluation of the first five years of MMT's Affordable Housing Initiative (AHI), coordinated development of a framework for a second five-year AHI, and supported implementation of the framework. 12/12 - present.
- **Coalition for a Livable Future** (Portland, OR): Project Manager for the Regional Equity Atlas, a research and education project using maps and data to illuminate the region's geography of opportunity and address disparities. 11/10 - present.
- **Portland Housing Bureau** (Portland, OR): Conducted 2010 evaluation of Dignity Village; coordinated 2009, 2011, 2013, and 2015 Homeless Street Counts and wrote comprehensive Point-in-Time Count reports; coordinated 2008 and 2009 HUD McKinney Continuum of Care grant applications and assisted with 2011 application. 10/08 - present.
- **Multnomah County** (Portland, OR): Conducted annual Fidelity Scale Assessment of Homeless Youth Continuum redesign. Provided consultation to Continuum partners regarding outcome measures and system refinements. 3/10 - present.
- **Multnomah County Department of County Human Services** (Portland, OR): Researched and wrote a comprehensive report on poverty in Multnomah County. 3/14 - 6/14.
- **10-Year Plan Reset Committee** (Portland, OR): Provided research and data analysis support to the Reset Committee for Multnomah County's 10-Year Plan to End Homelessness. 3/12 - 11/12.
- **Home Forward (Housing Authority of Portland)** (Portland, OR): Member of consulting team that facilitated five-year strategic planning process -- responsible for idea management, analysis of quantitative and qualitative data, best practices research, and writing. Coordinated research and analysis for Resident Communications Strategic Initiative. Analyzed and wrote summary reports for 2010 and 2012 employee surveys. 11/09 - 5/10, 4/11 - 11/11, 8/12 - 9/12.
- **211info** (Portland, OR): Worked with the region's human services hotline to assess how its data could be used to help inform planning and public policy. 10/10 - 4/11.
- **Oregon Opportunity Network** (Portland, OR): Worked with statewide network of affordable housing organizations to analyze the state of the industry for resident services; responsible for research, facilitation, synthesizing information, and producing a final written report. 2/10 - 10/10.
- **New Avenues for Youth** (Portland, OR): Conducted cost-benefit analysis of the social return on investment of agency's programs. Conducted environmental scan of gaps in services for homeless youth to help inform agency's strategic planning process. Researched and wrote report on younger homeless youth. 9/05 - 6/06, 11/09 - 4/10, 3/12 - 3/13.
- **Housing Development Center** (Portland, OR): Wrote a briefing paper on the sustainability of Seattle's affordable housing portfolio for the City of Seattle's Office of Housing. 5/08 - 8/08.
- **Meyer Memorial Trust** (Portland, OR): Conducted a multi-year evaluation of Multnomah County's Homeless Youth Continuum. 7/07 - 5/08.
- **Community Development Network** (Portland, OR): Coordinated strategic planning process involving multiple stakeholders and conducted research to address the technical and resource barriers to developing Permanent Supportive Housing. 9/05 - 6/07.

Portland Schools Alliance. *Portland OR. Interim Executive Director.* Led small non-profit through year-long transition period. Facilitated strategic planning process with leaders and stakeholders; evaluated and strengthened community organizing and training models. Responsible for board development, fundraising, staff training and supervision, and office management. 8/04 - 8/05.

Oregon Campaign for Economic Justice. *Portland, OR. Coordinator.* Coordinated a statewide coalition of community organizing and advocacy organizations working to impact state level public policy through grassroots organizing and education. Responsibilities included strategic planning; coordinating legislative work; developing action education workshops and materials. 2/02 - 3/04.

Housing Our Families. *Portland, OR. Community Organizer.* Designed and implemented a community organizing and leadership development initiative for a non-profit affordable housing developer. Facilitated multi-step community planning process, developed partnerships with stakeholder groups, and coordinated implementation of neighborhood-based projects. 6/93 - 8/95.

PUBLICATIONS

Democracy in Action: Community Organizing and Urban Change. Columbia University Press. January 2004.

"Building Effective Partnerships: The Structure and Process of Collaboration." *Shelterforce: The Journal of Affordable Housing and Community Building.* May/June 1999.

"Comprehensive Community Initiatives: A New Generation of Urban Revitalization Strategies." *Working Paper Series.* Comm-Org: The On-line Conference on Community Organizing and Development. 1997.

TEACHING EXPERIENCE

Portland State University. *Portland, OR. Adjunct Instructor, Department of Urban Studies and Planning.* Taught Capstone on The Future of Old Town, and graduate and undergraduate courses on models of community organizing. 6/02 - 6/09.

Urban Studies Program of the Associated Colleges of the Midwest. *Chicago, IL. Program Faculty.* Full-time faculty in an experiential learning program for college students. Designed and taught courses relating to urban development, community organizing, and public policy. 7/00 - 7/01.

Northwestern University. *Evanston, IL. Teaching Assistant and Lecturer.* Courses: Problems of Cities, The City: Urbanization and Urbanism, Social Problems, Sociological Theory, Complex Organizations, Revolutions and Social Change, Social Basis of Environmental Change. 3/96 - 6/00.

EDUCATION

Northwestern University. *Evanston, IL.* Ph.D. Sociology, 2000. Dissertation: "Strategies of Urban Change: A Comparative Study of Contemporary Models of Neighborhood-Based Community Organizing."

Northwestern University. *Evanston, IL.* M.A. Sociology, 1997. Master's paper: "Neighborhood Revitalization and Community Control: Building Community in a Capitalist Society."

Swarthmore College. *Swarthmore, PA.* B.A., 1992. Phi Beta Kappa, with Distinction.

Section 8: PTE Participation Disclosure Form 1

PTE PARTICIPATION DISCLOSURE FORM 1

This Request for Proposal requires submission by the Proposer of this PTE Participation Disclosure Form 1. Proposers must disclose the following information:

Please print all information clearly.

Proposer Name: Pacific Research & Evaluation Proposer's Total Cost: \$ 95,930.00

Project Name: Evaluation Services for MHCRC Grants in Public Schools IRFP Number: MHCRC2015

Contact Name: Steven Rider Phone: 503-595-3970 Email: steve@pacific-research.org

Percentage of total contract amount allocated to Oregon certified M/W/ESB participation	(Proposer & subconsultants added together)	10 %
---	--	------

PROPOSER INFORMATION (Please Print)	M/W/ESB	SCOPE / TYPE OF WORK	SELF-PERFORMING AMOUNT
Firm Legal Name: <u>Pacific Research & Evaluation, LLC.</u> Email: <u>steve@pacific-research.org</u> Phone #: <u>503-595-3970</u> Fax#: <u>503-595-3974</u> FED ID OR EIN # (No SS#): <u>93-1260932</u>		<u>Logic Model Dev.</u> <u>Eval. Plan Dev.</u> <u>Analysis of pre-existing data.</u> <u>Evaluation Implementation</u>	\$ <u>86,330.00</u>
SUBCONSULTANT INFORMATION (Please Print)	M/W/ESB	SCOPE / TYPE OF WORK	SUBCONTRACT AMOUNT
Firm Legal Name: <u>Kristina Smock Consulting</u> Email: <u>kris@kristinasmockconsulting.com</u> Phone #: <u>503-235-2492</u> Fax#: <u>N/A</u> FED ID OR EIN # (No SS#):	<u>w/ESB</u> <u>#4855</u>	<u>Conduct, analyze,</u> <u>report on</u> <u>teacher,</u> <u>leader</u> <u>interviews</u>	\$ <u>9,600.00</u>
Firm Legal Name: Email: Phone #: Fax#: FED ID OR EIN # (No SS#):			\$
Firm Legal Name: Email: Phone #: Fax#: FED ID OR EIN # (No SS#):			\$

NOTE:

- 1) Report all amounts in US Dollars (USD); using 'TBD', 'N/A', or similar symbols is not acceptable.
- 2) The Proposer and all subconsultants must be listed on this form. Leave M/W/ESB column blank if firm is not confirmed as currently certified through the State of Oregon Office of Minority, Women, and Emerging Small Business: <http://egov.oregon.gov/DCBS/OMWESB/index.shtml>.
- 3) If the Proposer will not be using any subconsultants, the Proposer is required to indicate "NONE" in the Subconsultant Information section of this form and submit this form with its proposal.
- 4) Do not enter Social Security numbers on this form.

Failure to submit this form with the proposal may result in the proposal being found non-responsive and rejected.