
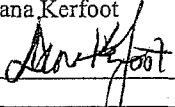


A description of changes made to Mojave to meet the requirements of this Section, including descriptions of plans to make changes to the system in the subsequent year.
USP Section X.A(5)(a)(ii)

Appendix 86

RFQ 13-95-13: USP EBAS Reporting and Monitoring Consulting Services


<p>Quotations Must Be Returned To this Office by:</p> <p>2:00 PM (local time) On Friday, March 15, 2013</p>	 <p>TUCSON UNIFIED SCHOOL DISTRICT #1 PURCHASING SERVICES Building B, Room 272 1010 E. 10th Street, Tucson, Arizona 85719</p>	<p>RFQ NO: 13-95-13 USP EBAS Reporting and Monitoring Consulting Services</p>
		<p>Issued by: Diana Kerfoot X </p>
		<p>Date: 03/12/13</p> <p>Phone: (520) 225-6080 Fax: (520) 225-6082</p>
<p>REQUEST FOR QUOTATION This is NOT a Purchase Order</p>		

The Tucson Unified School District #1 is seeking quotations for the purchase of the services listed herein. Purchase orders may be issued on an as needed basis during the contract period. Prices must be firm for the entire contract period.

INSTRUCTIONS: Please submit your quotations for the following scope of work. Quotations may be submitted via Fax to 520-225-6082, electronically to diana.kerfoot@tusd1.org, or delivered to the address above. Offeror must comply with all terms and conditions of the RFQ and must include the required documentation which allows full and fair evaluation. Failure to comply with these requirements may result in offer rejection. TUSD reserves the right to accept or reject all or part of any quotation submitted. Any resultant agreement, Purchase Orders, or other contracts shall be subject to cancellation pursuant to A.R.S. 38-511, incorporated herein by reference.

The Tucson Unified School District is soliciting quotations for the following goods and/or services:
Unitary Status Plan (USP) Evidence-Based Accountability System (EBAS) Reporting and Monitoring Consulting Services

(See Attached Terms and Conditions and Scope of Work Pages)

Tax Rate (if applicable) _____%	Federal Employer Identification (FEI) Number: 54-2127797
Name of Firm/Individual: Davidson Services, LLC	
Address: PO Box 1211, Hendersonville, TN, 37077-1211	Telephone Number: (615) 822-2617
	Fax Number: (615) 264-5983
Authorized Person (Type or Print) Charles L Odorizzi	
Authorized Signature 	



RFQ Number 13-95-13

Unitary Status Plan (USP) Evidence Based Accountability
System (EBAS)

Reporting and Monitoring Consulting Services

Prepared for



TUCSON UNIFIED SCHOOL DISTRICT #1
Purchasing Services, Building B. Room 272
1010 E. 10th Street
Tucson, AZ 85719

March 15, 2013





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1 Vendor Qualifications

1.1 Davidson Services Overview

Davidson Services, LLC was formed in 2001 to affordably address the technology consulting and service needs of educational institutions across the United States. The founders of the company, Jan and Bob Davidson, Chuck Odorizzi, and Cynthia Curtis are veterans in the education industry and bring together national expertise in applying technology as a tool for systemic change. The Davidsons were the founders of Davidson Software and the inventors of the *Math Blaster* and *Reading Blaster* series of educational software. Chuck Odorizzi and Cynthia Curtis worked together at IBM Global Services where they were Principals in IBM Global Services' K-12 Education practice. Since its founding, Davidson Services has built a customer base of school districts and other education organizations located in ten states and ranging in size up to 100,000 students.

Davidson Services' core expertise is the evaluation, selection and implementation of solutions supporting all areas of K-12 school district operations. Our evaluation and selection approach is requirements driven and extends beyond core system functionality to the interfaces required to make systems interoperate. In addition to implementing Student Information Systems (SIS) and Enterprise Resource Planning (ERP) systems, our experience extends to implementing and/or managing the creation of interfaces with a wide range of systems including assessment management, data warehouse, special education, curriculum management, instructional management, food service, transportation, emergency notification, library management, time clock, substitute tracking, work order management, and facility scheduling systems. This broad base of knowledge enables Davidson Services to look at the full range of district information systems, and ensure that any mission critical solution includes all the elements needed for successful operation.

Our consultants each have 15 or more years of experience evaluating and implementing K-12 solutions and have developed a strong reference base of clients we have worked with. Our business is *only* education organizations and we have some of the best knowledge of solutions within the industry. Characteristics that differentiate Davidson Services include:

- **Depth of Educational Experience.** Davidson Services is a company that works exclusively with education customers. Our staff consists entirely of professionals who have spent the majority of their professional careers working with K-12 school districts and other educational organizations to apply technology as a tool for student achievement and operational efficiency and effectiveness.
- **Freedom from Vendor Bias or Conflict of Interest.** Davidson Services is strictly a services company; we do not sell products, nor do we have partnership arrangements or



compensation agreements with any software or hardware vendor. This independence enables Davidson Services to serve as a neutral third party during needs assessments and software selections, and to effectively manage software vendor relationships and serve as the district's advocate with vendors during the course of a needs assessment or implementation project.

- **Strong Project Management Skills.** Davidson Services personnel are certified Project Managers, with the skills to act as the primary project management focal point for a system implementation in any size school district. In addition to developing and managing to a realistic project plan, we take responsibility to ensure all contractual obligations are met by the software vendor, provide leadership for resolving project specific issues, and establish a project status reporting structure tailored to each customer's size and organization. Our objective is to making sure the implementation is successful, and delivered on time and within budget. While many software vendors will assign a Project Manager to your implementation, that person typically will have numerous accounts to manage and have little time and flexibility to provide the district with a "hands on" approach to ensuring project success.
- **Real World Technology Expertise.** With fifteen or more years of experience apiece, our personnel have implemented, designed interfaces to, or reviewed most of the widely used systems in the education market. We also have strong expertise in assessing the effectiveness of technology operation and support organizations, and technology planning. Having worked with districts of all sizes through many projects enables us to quickly establish the relationships necessary for successful project delivery.
- **Grounded in Best Practices.** Through years of working with districts nationwide, Davidson Services has developed a thorough understanding of best practices and the practical application of technology in the K-12 education environment. The best practices we recommend align with leading organizations including the Project Management Institute (PMI), the International Society for Technology in Education (ISTE), the Consortium for School Networking (CoSN), the CEO Forum, and the Council of Great City Schools.
- **Flexible, Customized Solutions.** Davidson Services has built a customer base of education clients ranging in size from 3,000 students up to 100,000 students. Prior to joining Davidson Services, our personnel have worked with districts as large as 250,000 students. We understand the unique needs and resources of small, medium, and large districts, and tailor our services and recommendations to the specific characteristics of each customer.



1.2 Vendor Profile

Company Headquarters:

Davidson Services, L.L.C.
800 Southwood Blvd, Suite 204,
Incline Village, NV, 89451

Business Office (correspondence, invoices and payment):

Davidson Services, L.L.C.
PO Box 1211,
Hendersonville, TN, 37077-1211
Phone: (615) 822-2617
Fax: (615) 264-5983

Company Web Site: www.davidsonservices.com

1.3 Contact Person

The following is the contact information for this proposal.

Name: Pete McKenzie
Title: Project Director
Email: pmckenzie@davidsonservices.com
Phone: (505) 401-7625



2 Experience

The following sections describe some of the Davidson Services projects recently delivered to K-12 districts of similar size and/or work efforts germane to those required by TUSD.

2.1.1 Client: Lake Erie Education Computer Association (LEECA)

LEECA is one of the 23 Information Technology Centers (ITC's) that comprise the Ohio Education Computer Network (OECN). LEECA provides technological services to 24 member K-12 school districts, comprised of 146 schools with an aggregate student enrollment of over 78,000 students.

Lake Erie Educational Computer Association contracted with Davidson Services to evaluate upgrading their installed eSIS student information system software from The Administrative Assistants Ltd. (AAL), which was licensed through the State of Ohio or replacing it with new software. Based on LEECA's commitment to provide the best solution available to its schools, an RFP created by Davidson Services, was issued to enable LEECA and its member districts to evaluate the tradeoffs between (1) staying the course with AAL and waiting for the release of the new version of eSIS currently under development and (2) implementing a new SIS product.

In preparing the RFP, Davidson Services conducted needs assessment meetings with all member school districts, identifying software functionality needed as well as satisfaction with the current environment. This information was used to generate a comprehensive RFP, functional specifications, and demonstration scripts so LEECA participants could compare the functionality currently available in eSIS with the current functionality of other SIS products. When the decision process was nearly complete, AAL was acquired by Pearson School Systems, which discontinued support for eSIS, and offered incentives for migrating to a different Pearson SIS product. With Davidson Services' assistance, LEECA was able to rapidly adapt to this change, evaluate the SIS product proposed by Pearson using the same methodology and evaluation criteria that had been applied to the other SIS solutions evaluated, and make a final decision with minimal extension of the project timeline, and within the originally proposed budget.

2.1.2 Client: Akron Public Schools

Akron Public Schools selected Davidson Services to assist with their procurement of new SIS and ERP system software and implementation services. After using the legacy Delta Management System for over 15 years, Akron had a highly customized solution that was no longer being supported by the vendor and was costly to maintain and enhance.

Davidson Services began the selection process by conducting a needs assessment. Through a series of group and individual discovery sessions, Davidson Services identified critical



requirements, documented current business processes, and prepared a business case supporting the implementation of new SIS and ERP systems. The needs assessment provided the starting point for preparing a comprehensive SIS and ERP System Request for Proposals.

After the release of the RFP, Davidson Services managed the demonstration and selection process for the district. A core team of district personnel was organized to review thirteen proposals and select the top two student information responses and the top three ERP system responses as finalists. Using the critical requirements identified during the needs assessment, Davidson Services created a demonstration script for the vendors as well as a scoring matrix for district personnel and arranged 3 day reviews of the new software from each vendor. A final quantitative scoring summary was prepared based on the input from district personnel attending the demonstrations which allowed Akron Public Schools to select two new vendors, one for their SIS, and one for their ERP System.

Once the software vendors were selected, Davidson Services coordinated site visits to existing customers of each vendor to gather lessons learned and finalize the decisions. Davidson Services then assisted with contract negotiation, reviewing vendor contracts, recommending changes to protect the district's interests, and participating in negotiations calls with the vendors. Together APS personnel and Davidson Services successfully negotiate a final contract with each vendor; this work was concluded in September 2009.

Working as the districts' Project Manager and advocate with the vendor, Davidson Services successfully implemented both Akron's new student and ERP system in a parallel implementation. Both of these implementation projects were delivered within established timelines and budgets. As scheduled, APS cutover to the new Finance/Procurement modules in July 2010 and the Human Resources/Payroll modules in January 2011. Scheduling in the new Student Information System (SIS) began in March 2010, and the district went live with the full SIS at the start of the 2010-11 school year. Based on the success of the implementation projects, Davidson Services provided post implementation support, and assistance with implementation of extended functionality for both the SIS and ERP systems through July of 2012.

2.1.3 Client: McKinney Independent School District

McKinney Independent School District (MISD) selected Davidson Services to assist the district with the evaluation, selection, and implementation of new Business, Human Resources, and Student Information Systems to replace the District's aging legacy systems. Davidson Services performed the following services:

- Conducted process review focus groups to document the District's current business processes,
- Identified gaps in the current system's ability to meet MISD's needs,
- Defined requirements for the new application software,
- Prepared an RFP for new Business, Human Resources, and Student Information



Systems,

- Prepared a business case for replacing the legacy systems,
- Managed the RFP process including hosting the vendor conference; responding to vendor questions; evaluating proposals; conducting and scoring vendor demonstrations; and negotiating contracts with the successful vendors,
- Provided project management and implementation assistance for the implementation of the new systems, and
- Established interfaces to a wide range of other district systems including their data warehouse, assessment system, transportation system, food service system, library management system, demographer, applicant tracking system, substitute management system, time clock system, and event management system.

2.1.4 Client: Columbus City Schools

Columbus City Schools (CSS) contract with Davidson Services to provide consulting and implementation services in support of their ERP Implementation Project. As part of this effort, Davidson Services conducted a review of the current processes to prepare CCS for their ERP implementation project. The objectives of the review included:

- Understand the critical business processes in place today at CCS and identify potential technical and/or functional gaps,
- Identify procedures and processes that can be simplified and streamlined with the installation of new software to include identification of redundant processes and data sources,
- Collect examples of critical reports required to run the business and identify any reporting gaps not covered by the new ERP solution.
- Provide information to ERP vendor business consultants on requirements for the installation and customization of the ERP software. The process document was used by vendor business consultants to prepare for implementation analysis sessions.
- Determine in a collaborative manner, mutually agreed to "go-live" dates for the major systems to be implemented at CCS.

As part of this effort, CCS also contract with Davidson Services for project management and implementation services.

2.1.5 Client: Salem-Keizer Public Schools

Salem-Keizer Public Schools is the second largest district in the state of Oregon, serving nearly 40,000 students. Approximately 43% of the student population participates in the Free and Reduced Meals program. The district is comprised of 73 different programs in 69 physical



locations (45 elementary, 10 middle school, 6 high school, 8 secondary alternative programs, 2 elementary school charter schools and 2 middle school charter schools).

Salem-Keizer selected Davidson Services to assist the district with the evaluation and selection of a Formative Assessment System. District personnel collected input from nearly 400 teachers regarding requirements for the new system, based on a list of questions provided by Davidson Services. Using the data collected, Davidson Services prepared a functional requirements checklist for the assessment system, and then prepared an RFP using format and general terms and conditions provided by the District's Purchasing Department. Once the RFP was released Davidson Services facilitated the District's vendor conference and produced an Addendum to the RFP documenting the questions and answers from that conference. Davidson Services also prepared proposal evaluation forms and rubrics for use by the District's Evaluation Committee in scoring proposals. Davidson Services facilitated the evaluation and selection process by compiling and presenting proposal scores, and assisted with the preparation of instructions for vendor demonstrations. Davidson Services compiled scores from the vendor demonstrations, assisted the Evaluation Committee with the final vendor selection, documented the evaluation and selection process, and assisted the district with negotiating a contract with the successful vendor.



3 Personnel

3.1 Key Person Responsible for Project

The key person responsible for this project including communicating with TUSD is Pete McKenzie. Additional support will be provided as needed by Ms. Cynthia Curtis and Mr. Chuck Odorizzi.

3.2 Resumes

Resumes for the proposed Davidson Services professional staff are provided below.



Peter P. McKenzie

<p>Total Years Experience 21 years</p> <p>Education Masters Degree in Business Administration - University of Phoenix Bachelors degree in Accounting - New Mexico State University</p> <p>Professional Certifications Certified Project Management Professional (PMP) – Project Management Institute</p> 	<p>Mr. McKenzie is a Senior Consultant and a Project Management Institute (PMI) Certified Project Manager with over 21 years experience as a consulting professional managing complex systems integration projects and assisting clients in using technology for improving operations and administrative processing. Mr. McKenzie specializes in administrative systems implementation, process reengineering, technology planning, and outsourcing.</p> <p>WORK HISTORY</p> <ul style="list-style-type: none"> ▪ Davidson Services, LLC. (2002 – Present) ▪ IBM Corporation – Senior Consultant, Administrative Systems (1996 - 2002) ▪ BDM International – Senior Education Consultant (1993 - 1996) ▪ Titan Education Services – Education Consultant (1990 - 1992) ▪ BDM International – Manager of Administration and Operations (1985 - 1990) <p>SKILLS AND EXPERIENCE</p> <ul style="list-style-type: none"> - Mr. McKenzie recently completed an ERP project at a large Ohio school district. On this project his primary responsibilities included managing the configuration and implementation of the HR and Payroll applications. Additional services provided included data conversion support, interface design, workflow design and development, parallel test planning and implementation and post production support. - Mr. McKenzie has provided consulting services to a number of Texas school districts with an emphasis on project management and implementation services. Consulting services included process and workflow design and development, security design, application configuration, data conversion support, On-line open enrollment implementation
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	<p>and custom report writing.</p> <ul style="list-style-type: none">- As part of a consulting team, Mr. McKenzie provided key ERP consulting support in a large Texas agency project to evaluate benefits of providing a standardized ERP solution for K-12 districts across the state. Efforts included conducting structured interviews with many Texas organizations to understand their current ERP environments and requirements. In addition, Mr. McKenzie provided key input in developing options, estimates and recommendations as part of the final report.- Mr. McKenzie managed the implementation of two different ERP systems for clients in TN and TX. He was responsible for managing the overall implementation project and also provided consulting services in the areas of business process improvement, configuration planning, and interface design and implementation between the core applications and ancillary solutions.- Mr. McKenzie was the Project Manager for a complex system implementation and integration project at a large school public sector customer in the Tampa area. Mr. McKenzie was the primary client contact and provided direct management and responsibility for the configuration and implementation of Lawson Finance, Procurement and HR/Payroll applications and executive oversight for the design, development and implementation of a Data Warehouse solution. In addition, he provided executive oversight and direction in the development and implementation of the client's imaging solution. He was responsible for the overall integration of each of the information technology solutions and coordinating requirements among the project teams.- Mr. McKenzie provided consulting services for the Texas Comptroller's Office. Areas of responsibility included information technology, finance, human resources, payroll, transportation, security and purchasing.- Mr. McKenzie managed a process reengineering project for a Philadelphia area public sector client. The project team reviewed and documented the "As-Is" process environment, identified areas of improvement and recommended actions.
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	<p>Mr. McKenzie developed a series of "To-Be" processes in support of the identified improvement areas.</p> <ul style="list-style-type: none">- Mr. McKenzie served as Project Executive for the implementation of the Walker Interactive Financial System and Cyborg HR/Payroll addressing all administrative functions at large public sector client. This project included review and modification of existing administrative processes, training, and integration with the client's finance and payroll systems.- Mr. McKenzie was the New Systems Implementation Manager on an outsourcing project at a large public sector client in Ohio. He led the transition activities in the administrative systems area to stabilize existing systems and areas for immediate improvement. He was responsible for managing all implementation and integration efforts in support of the JD Edwards Financial and HR/Payroll. Additional responsibilities included reengineering the client's administrative processes for efficiency and cost savings.- Mr. McKenzie was a key contributing team member in developing requirements and RFP for a statewide ERP solution for a State Department of Education. This effort included assessment of existing district and state systems, conducting focus group sessions to collect key functional requirements and developing the RFP structure and document.
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Cynthia C. Curtis

<p>Total Years Experience 27 years</p> <p>Education Master of Science Degree in Operations Research - Stanford University</p> <p>Bachelor of Science in Systems Engineering -University of Virginia</p> <p>Professional Certifications IBM Certified Project Management Professional</p>	<p>Cynthia Curtis specializes in providing technology planning, solution selection, and system implementation services to K-12 education organizations. Ms. Curtis has twenty-six years of business, project, and product management experience, with the past twelve years spent working exclusively with K-12 school districts. Ms. Curtis has performed a multitude of requirements definition, business process review, and solution evaluation and selection projects. She has also successfully managed a wide range of implementation projects. including student and financial system implementations, assessment systems, data warehouse systems, and large scale hardware, software, and network deployments.</p> <p>WORK HISTORY</p> <ul style="list-style-type: none"> ▪ Davidson Services, LLC. (2001 – Present) ▪ IBM Corporation – Principal, Administrative Systems (1996 - 2001) ▪ BDM International Inc.- Manager of Systems Integration (1986 - 1996) ▪ Digital Equipment Corporation – Product Manager (1983 - 1986) ▪ AT&T Bell Laboratories – Member of Technical Staff (1979 - 1983) <p>SKILLS AND EXPERIENCE</p> <ul style="list-style-type: none"> - Currently serving as Project Manager for the implementation of a new Student Information System (SIS) at an 80,000 student K-12 school district. - Project Manager for the selection of a new SIS by a consortium serving 24 districts with an aggregate enrollment of 78,000 students. Conducted needs assessment meetings with all 24 districts, developed an RFP with requirements defined through the needs assessment, and facilitated the evaluation and selection process including proposal evaluation, vendor
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	<p>demonstrations, and implementation cost estimates for each vendor.</p> <ul style="list-style-type: none">- Project Manager for the selection of new ERP and SIS products at a large Ohio school district. Conducted business process review meetings, defined requirements, drafted a Request for Proposals, and facilitated proposal evaluation, vendor demonstrations, and site visits to current customers. Following system selection, provided project management for the implementation of the new SIS and a new Assessment Management System.- Project Manager for evaluation and selection of new Finance and Student Information Systems for a 23,000 student Texas school district. Ms. Curtis participated in the As-Is Process Review, documented requirements, prepared a Request for proposals, oversaw business case development, facilitated proposal evaluation, vendor demonstrations, and final selection, and lead contract negotiations. Following the selection process, provided project oversight for both the ERP and SIS implementation projects.- Project Manager and/or Consultant on technology planning and implementation projects for multiple schools districts in Oklahoma, Nevada, Washington, Virginia, and Ohio. Interviewed district staff and community stakeholders; assessed the state of existing business processes, information systems, technology infrastructure, professional development, and technology support organizations; documented "As-Is" processes and systems; defined "To-Be" processes and target future technology environments; and developed plans and budgets to transition from the current state to the future vision through phased projects driven by the customer's priorities and budget constraints.- Project Manager responsible for the successful start-up of a \$27 million, five-year outsourcing and systems integration contract for one of the largest school districts in Ohio. Ms. Curtis accomplished a smooth transition of information systems operating responsibility from the customer to the
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	<p>outsourcing company, hired a staff of twenty-five, reorganized to improve operating efficiency, and initiated implementation of new student, financial, and human resources systems.</p> <ul style="list-style-type: none">- Project Manager for a \$1.5 million school-based technology implementation project for the tenth largest school district in the United States. Ms. Curtis managed the planning, installation, and support of more than 2,600 computers, network wiring, local and wide area network hardware, and instructional software in approximately one quarter of the district's schools.- Project Manager for a three-year, \$6 million systems integration project for the second largest school district in Nevada. She directed the installation and integration of 4,000 personal computers, 80 local area networks, a new wide area network connecting all district facilities, and a new enterprise server at the district office. Managed the implementation of new student information finance, and human resource systems, and instituted an on-going training and staff development program. Worked with district management to restructure the information systems organization, implement network management tools, and provide technical training to ensure the district's ability to operate and support the new infrastructure.- Over the course of her career, Ms. Curtis has provided project management and consulting services for organizations including major aerospace corporations, Fortune 500 companies, small businesses, the US Air Force, and the US Navy.
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Charles L. (Chuck) Odorizzi

<p><i>Total Years Experience</i></p> <p>33 years</p> <p><i>Education</i></p> <p>Bachelor of Science, Accounting and Business Administration with a Minor in Computer Science</p> <p>- University of Wisconsin</p> <p><i>Professional Certifications</i></p> <p>Certified Project Management Professional (PMP) – Project Management Institute</p> 	<p>Mr. Odorizzi is a Project Management Institute (PMI) Certified Project Manager, and has been involved in the Information Technology service field for 33 years. The first ten years of his career, Mr. Odorizzi provided technical and marketing services for clients across multiple industries as well as working in product development positions within IBM. For the past 26 years, he has been involved with technology planning; delivering integrated solutions to K-12 schools and colleges for student, financial, library, transportation, food service, and special educational systems; and leading complex system integration efforts for large scale rollouts of network infrastructure, servers, workstations and software.</p> <p>WORK HISTORY</p> <ul style="list-style-type: none"> ▪ Davidson Services, LLC. (2001 – Present) ▪ IBM Corporation – Principal, Administrative Systems (1996 - 2001) ▪ IBM Corporation – Project Manager (1990 - 1996) ▪ IBM Corporation – Marketing Manager (1986 - 1990) ▪ IBM Corporation – National Support (1986 – 1984) ▪ IBM Corporation – Support Manager (1982 - 1986) ▪ IBM Corporation – National Support (1980 - 1982) ▪ IBM Corporation – System Engineer (1975 - 1980) <p>SKILLS AND EXPERIENCE</p> <p>- Project Manager and/or Consultant on technology planning and implementation projects for multiple public sector clients in Wisconsin, Oklahoma, Nevada, Wisconsin, Illinois, Alaska, and Texas. Interviewed client staff and community stakeholders; assessed the state of existing business processes, information systems, technology infrastructure, professional development, and technology support organizations; documented “As-Is” processes and systems; defined “To-Be” processes and targeted future technology environments; and</p>
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	<p>developed plans and budgets to transition from the current state to the future vision through phased projects driven by the customer's priorities and budget constraints.</p> <ul style="list-style-type: none">- Program Manager for the creation of a consortium of five Wisconsin public sector organizations to evaluate and select new Finance, Human Resources, and Payroll System to replace existing Comprehensive Information Management System III (CIMS) software, and implemented the selected software in a hosted environment. This approach enabled the smaller members in the consortium access to a tier one software product that would otherwise have been unaffordable, and allowed all members to leverage each other's configuration, business process, and implementation expertise, providing both functional improvements and cost efficiencies.- Program Manager for comprehensive implementation of ERP and integrated ancillary solutions for a client located in the Madison area, replacing the legacy Comprehensive Information Management System III (CIMS) software. Directed the evaluation and selection project and implementation of the selected system.- Reviewed the I/T organization of a large public sector client and identified specific recommendations for training, reporting structure, communications and end user support to enhance the value of the support and services delivered.- Created an innovative model for a public sector client in Alaska to analyze multiple networking solutions across the organization's 86 buildings, allowing the customer to negotiate significant discounts for equipment and installation.- Performed a complete business process review for a public sector client located in Oklahoma. Reviewed all major financial systems, documented process flows, identified critical processes where automation would show quick paybacks and recommended process improvements when necessary. Prepared business case and implementation plan and negotiated contracts with multiple software vendors. Worked with the selected software vendor to negotiate enhancements to the software to address major productivity
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	<p>issues discovered within the organization.</p> <ul style="list-style-type: none">- Executive Sponsor for business process reviews and Information Technology Architecture development engagements at public sector clients located in Philadelphia and Illinois. Provided the executive leadership to drive the project to completion, presented recommendations and justification for process changes and presented multiple presentations for board members, department administrators, staff and the public on the results of the findings. Successfully met budget constraints while significantly enhancing overall network connectivity, bandwidth and voice services across each of the organizations.- Long term executive sponsor and consultant to a public sector customer located in Indianapolis, IN. Assisted the client with the re-design of their entire data and voice network. Completed an organization-wide design and rollout of a high function PBX and voicemail solution to bring voice services to all buildings. Created a plan to ease migration to a converged data/voice network.
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4 Proposed Work Plan and Deliverables

4.1 *Our Approach*

Davidson Services' needs assessment and requirements definition approach is based on many consulting and implementation projects successfully delivered to our K-12 clients. The approach is refined and updated after each project to incorporate new ideas, strategies and lessons learned.

Our experience working exclusively with K-12 clients and knowledge of the solutions serving the market often reduces the research effort needed in formulating options for meeting district needs. Many of the source systems necessary to meet EBAS requirements have been implemented by our staff, in districts both larger and smaller than TUSD. Our work plans are designed to generate deliverables that can be used to support future efforts and next steps such as RFP development and implementation, and to ensure the district is properly prepared with the resources and tools for a successful selection and implementation. Examples of these items include the following.

- In addition to the discussion of project specific requirements, the Needs Assessment interviews typically identify existing technical, functional or reporting gaps that can be documented and included in further analysis, validation and planning.
- Preparing a Total Cost of Ownership (TCO) estimate for the acquisition, implementation and support of EBAS related solutions engages the district in early implementation planning, which results in a better ability to communicate how the implementation will take place. The Total Cost of Ownership also supports clear communication with district leadership about the costs of the implementation, and how those costs will be spread across fiscal years.
- In addition to estimating project costs via the TCO, our projects provide an implementation plan and timeline which not only sets proper expectations for TUSD stakeholders and staff, but provides the implementation team with a baseline for project budgeting and planning.

4.2 *Conduct Project Planning and Needs Assessment*

The following is a description of the work plan for the Analysis and Planning phase of the District's overall EBAS initiative.

4.2.1 *Plan and Manage the Project*

Davidson Services will provide project management services in support of this project. The



Project will be managed using the Davidson Services' Project Management Methodology which is based on the framework and best practices established by the Project Management Institute (PMI).

Task 1: Develop the Project Schedule and Track Progress

The objective of this task is to incorporate input from TUSD Project Sponsor and Project Manager to finalize the work approach, prepare a project plan, and establish the framework for status reporting and procedural and contractual activity. The Davidson Services Project Manager will be responsible for the following subtasks:

- Work with the TUSD Project Manager to finalize the project statement of work and Project Plan
- Prepare and submit bi-weekly project status reports to the TUSD Project Manager to include updating the project schedule
- Coordinate with the TUSD Project Manager on scheduling and conducting project related interviews and focus groups.
- Coordinate the review of project work products and deliverables with the Project Sponsor and Project Manager

4.2.2 Conduct Needs Assessment

Davidson Services will define and document requirements by reviewing EBAS related documentation, interviewing key EBAS stakeholder groups and evaluating the district's current data systems targeted for use in meeting EBAS needs. Examples and established topics will be developed and distributed prior to each of the scheduled interviews and group sessions. Topics will include a discussion of EBAS requirements in each of their respective areas, systems used to support current and future EBAS requirements, strengths of the current systems used, and unmet needs. The advantages to this approach are:

- Pre delivered interview/focus group session topics and examples will ensure requirements are efficient captured within the allotted time;
- Discussion of existing systems in each area will provide a basis for determining potential modifications for meeting current technical/functional and or reporting needs;
- Discussion of EBAS requirements against available systems in each of the assessment areas will identify and/or validate gaps resulting from the systems assessment; and
- Provide a springboard for launching the overall project and allowing key district staff with direct input into the needs assessment process.



Task 1: Schedule Needs Assessment Meetings

Working with the TUSD Project Manager, Davidson Services will finalize plans for the number of needs assessment interviews and focus groups and their topics, and schedule the interviews and focus groups. Davidson Services proposes to conduct interviews with key EBAS stakeholders, district leadership, and key functional users.

The following is the initial list of focus groups Davidson Services proposes to conduct. Davidson Services will work with the TUSD Project Sponsor and Manager to determine participants for each session. It is assumed that no more than twenty (20) interview/focus group sessions will be conducted and that each session is conducted within a two (2) hour timeframe.

Interview/Focus Group Areas	
Leadership (Academic)	Leadership (Operations)
Student Assignment and Magnet Schools	Enrollment
Attendance	Professional Development
Transportation	Recruitment/Hiring
Evaluations	Academic Achievement and Assessment
Student Services	Discipline
Family and Community Engagement	Extra Curricular Activities
Facilities	Technology
Accountability and Transparency	

Task 2: Define and Document Initial Requirements

Before the interviews and focus group sessions, Davidson Services will review documentation supporting the EBAS initiative to include the Initial Court Order, the Approved Unitary Status Plan (USP) and any USP updates. Subtasks performed in support of this task include the following.



-
- Extract technical and functional requirements from USP specific documentation.
 - Identify areas/requirements requiring further clarification/definition.
 - Establish discussion topics and examples used for facilitating the interview/focus group sessions.
 - Begin building the technical and functional requirements to be used in future project tasks (e.g. assessment of district data systems and RFI process).

Deliverables Produced:

- Draft EBAS Requirements Report

Task 3: Conduct Needs Assessment Meetings

Davidson Services will work with the TUSD Project Manager to identify the assessment participants and the overall interview/meeting schedule. TUSD will be responsible for communicating with district participants regarding the interview/meeting schedule and verifying their attendance. TUSD will be responsible for securing appropriate facilities for these meetings and providing a resource(s) for capturing meeting minutes (e.g. recording/note taking). Before the interviews and focus group sessions, attendees will be provided with preparatory information including meeting objectives, expected outcomes and EBAS related topics and examples.

Deliverables Produced:

- Interview/Focus Group Schedule
- Interview/Focus Group Meeting Agenda

Task 4: Prepare Needs Assessment Summary Report

Davidson Services will prepare a Needs Assessment Summary Report documenting the information collected during the Needs Assessment Meetings. The Needs Analysis Summary Report will:

- Document information collected about EBAS requirements in each of the areas covered by the Needs Assessment Meetings;
- Present a list of potential technical, functional and/or reporting gaps potentially keeping the district from meeting EBAS requirements; and
- Provide a listing of EBAS technical and functional requirements.

Deliverables Produced:

- Needs Assessment Summary Report



4.3 Conduct Market Research

Davidson Services will conduct a number of research efforts to provide TUSD with insight into initiatives that are similar in size and scope performed by other K-12 districts. In addition, Davidson Services will research the availability of commercial products that may potentially meet the district EBA requirements. Subtasks to be performed include the following.

- Identify districts of similar size that have successfully implemented systems delivering capabilities that are similar to the district's EBSA needs.
- Along with TUSD support, develop a list of topics/areas for to drive discussions with identified districts.
- Facilitate meetings (via conference call or teleconference) with up to five (5) identified districts to discuss their overall process, implementation and experiences.
- Determine availability of potential EBSA solutions through research of primary vendors and their products servicing the current marketplace.

Deliverables Produced:

- District and Contact Listing
- District Contact Discussion Questions
- Vendor and Product Listing

4.4 Develop Request for Information (RFI)

Davidson Services will facilitate an RFI process that will provide TUSD stakeholders exposure to solutions capable of meeting the district EBSA requirements. As part of the RFI process, Davidson Services will prepare a Request for Information inviting vendors to participate, develop a structure for capturing vendor responses to district EBAS requirements and summarizing TUSD participant assessment of each vendor solution. Functional and technical requirements collected during the Needs Analysis will be incorporated into the document.

Task 1: Produce RFI Checklist

Using the data collected during the Needs Assessment, Davidson Services personnel will produce a RFI checklist of EBAS functional needs to be used by vendors in preparing their RFI responses. The objective of this task is to produce a checklist of EBAS requirements for use comparing multiple vendor products' functional capabilities on a consistent set of measures.

Task 2: Prepare RFI

Based on the technical and interface information collected during the Needs Assessment, Davidson Services will develop the rest of the Request for Information document. The RFI will be developed using the standard TUSD template if one exists, or Davidson Services can provide an RFI format. We will coordinate with TUSD's Purchasing staff to understand the process for



release of an RFI, and any format and content TUSD uses for the RFI process.

The RFI will include a required response outline that will ensure vendors provide all the information necessary for effective evaluation of their ability to meet TUSD's needs. RFI sections for consideration include the following.

- Vendor Profile
 - Company overview
 - Product(s) Offered
 - K-12 Installation Base (Clients and District Size)
 - References
- EBAS Functional Requirements Checklist
- Technical Requirements
 - System Architecture
 - Software Requirements (Modules and Third Party Software)
 - Hardware Requirements
 - Performance and Scalability
 - Customization and Reporting Tools
 - Interface Tools/Utilities
 - Security
 - Software Maintenance
 - Technical Support
- Implementation Methodology/Overview
- Cost/Pricing Structure (Product, Maintenance, etc)

After the RFI document has been reviewed and approved by all appropriate parties, the final RFI will be delivered to TUSD's Purchasing Department for release as well as a list of potential vendors identified during the market research effort.

Task 3: Summarize RFI Responses

Working with TUSD staff, Davidson Services will summarize vendor RFI responses and results of the RFI process. The summary will be provided in a PowerPoint presentation and summarize each of the vendors and their solutions. The summary will be incorporated as part of the Final Report.

Deliverables Produced:

- Request for Information (including EBAS Requirements Checklist)



-
- RFI Response Summary

4.5 Define Acquisition/Implementation Strategy and Present Findings

Based on the information collected throughout the needs assessment project, Davidson Services will develop recommended strategy for acquiring and implementing the needed product(s) and resources for EBAS solution. The document will provide a list of required tasks, a timeline and estimated budget.

Task 1: Develop EBAS TCO Estimate

Using information garnered from the RFI process, Davidson Services will estimate the Total Cost of Ownership for the EBAS solution using a model which has been proven and used for other clients. The TCO model reflects all the direct and indirect costs associated with the acquisition, implementation, and operation of the EBAS solution by fiscal year over a five year period. In addition, any modifications to or replacement of existing district systems will be incorporated into the TCO. The TCO model will present a comprehensive view of the costs and provide TUSD stakeholders with an estimated range of investment expectation.

Task 2: Define Implementation Tasks and Timeline

Davidson Services will develop an estimated EBAS implementation plan and timeline. The implementation plan will include all tasks, associated dependencies and estimated durations for implementing the EBAS solution. The implementation plan will be designed by phase to ensure all implementation efforts are properly prioritized and staged.

Task 3: Develop EBAS Final Report

Davidson Services will develop a final report for the TUSD leadership team that outlines project objectives, describes the overall work effort and tasks completed, presents project findings and provides recommended next steps. The EBAS Final Report will be in the form of a PowerPoint Presentation. The final report and other project deliverables will provide TUSD leadership with the information needed for deciding future EBAS related actions and projects.

Deliverables Produced:

- EBAS TCO Estimate
- EBAS Implementation Plan and Timeline
- EBAS Final Report



5 Change Authorization Process

Davidson Services recognizes that, with any technology related projects, changes can and do occur. Following fundamental project management processes, Davidson Services personnel are trained to keep changes to a minimum and projects on schedule. When changes are required however, new and/or additional tasks will be documented; costs estimated (using the negotiated hourly rate) and impact on schedule determined. The results of this work will be presented to the TUSD Project Sponsor and if accepted, TUSD will sign a change order. Work will not begin on any changes until Davidson Services receives authorization from TUSD in the form of a signed Change Order and an amended purchase order.

The following is an estimated schedule for the EBAS Project. The schedule assumes a start date of 3/25/2013. The project schedule will be finalized based on the actual start date and input from the TUSD Project Sponsor and Project Manager.



6 Estimated Schedule

The following is an estimated schedule for the proposed services. The schedule assumes a start date of 3/25/2013. The schedule will be revised based on actual start date and input from the TUSD Project Sponsor and Manager.

ID	Task Name	Dur	Start	Finish	Gantt Chart											
					4/14	4/21	4/28	5/5	5/12	5/19	5/26	6/2	6/9	6/16	6/23	
1	Tucson EBAS Needs Assessment Project	69 days	Mon 3/25/13	Thu 6/27/13	[Gantt bar from 3/25/13 to 6/27/13]											
2	Project Planning and Management	69 days	Mon 3/25/13	Thu 6/27/13	[Gantt bar from 3/25/13 to 6/27/13]											
3	Finalize Project Schedule/Scope/Communication Plan	2 days	Mon 3/25/13	Tue 3/26/13	[Gantt bar from 3/25/13 to 3/26/13]											
4	Track Project Progress	69 days	Mon 3/25/13	Thu 6/27/13	[Gantt bar from 3/25/13 to 6/27/13]											
5	Conduct Needs Assessment	31 days	Wed 3/27/13	Wed 5/8/13	[Gantt bar from 3/27/13 to 5/8/13]											
6	Identify Needs Assessment Participants	3 days	Wed 3/27/13	Fri 3/29/13	[Gantt bar from 3/27/13 to 3/29/13]											
7	Schedule Needs Assessment Meetings	3 days	Mon 4/1/13	Wed 4/3/13	[Gantt bar from 4/1/13 to 4/3/13]											
8	Review USP Documents and Develop Initial EBAS Requirements	5 days	Mon 4/1/13	Fri 4/5/13	[Gantt bar from 4/1/13 to 4/5/13]											
9	Develop Meeting Examples and Topics	3 days	Mon 4/8/13	Wed 4/10/13	[Gantt bar from 4/8/13 to 4/10/13]											
10	Conduct Needs Assessment Meetings	10 days	Mon 4/22/13	Fri 5/3/13	[Gantt bar from 4/22/13 to 5/3/13]											
11	Develop Needs Assessment Summary Report	5 days	Thu 5/2/13	Wed 5/8/13	[Gantt bar from 5/2/13 to 5/8/13]											
12	Conduct Market Research	18 days	Mon 5/6/13	Wed 5/29/13	[Gantt bar from 5/6/13 to 5/29/13]											
13	K-12 Districts	11 days	Mon 5/6/13	Mon 5/20/13	[Gantt bar from 5/6/13 to 5/20/13]											
14	Identify Districts with Similar/Successful Initiatives	3 days	Mon 5/6/13	Wed 5/8/13	[Gantt bar from 5/6/13 to 5/8/13]											
15	Coordinate/Facilitate District Conference Calls	5 days	Thu 5/9/13	Wed 5/15/13	[Gantt bar from 5/9/13 to 5/15/13]											
16	Document Conference Call Information/Findings	3 days	Thu 5/16/13	Mon 5/20/13	[Gantt bar from 5/16/13 to 5/20/13]											
17	EBAS Vendors/Products	15 days	Thu 5/9/13	Wed 5/29/13	[Gantt bar from 5/9/13 to 5/29/13]											
18	Identify Potential Vendors and Solutions	5 days	Thu 5/9/13	Wed 5/15/13	[Gantt bar from 5/9/13 to 5/15/13]											
19	Compile/Summarize Solution Information	10 days	Thu 5/16/13	Wed 5/29/13	[Gantt bar from 5/16/13 to 5/29/13]											
20	Develop Request for Information (RFI)	19 days	Thu 5/9/13	Tue 6/4/13	[Gantt bar from 5/9/13 to 6/4/13]											
21	Develop RFI Outline and Structure	1 day	Thu 5/9/13	Thu 5/9/13	[Gantt bar from 5/9/13 to 5/9/13]											
22	Finalize RFI Requirements Checklist	2 days	Thu 5/9/13	Fri 5/10/13	[Gantt bar from 5/9/13 to 5/10/13]											
23	Develop RFI Document	3 days	Mon 5/13/13	Wed 5/15/13	[Gantt bar from 5/13/13 to 5/15/13]											
24	Summarize RFI Responses	4 days	Thu 5/30/13	Tue 6/4/13	[Gantt bar from 5/30/13 to 6/4/13]											
25	Acquisition/Implementation Strategy	2 days	Thu 5/30/13	Fri 5/31/13	[Gantt bar from 5/30/13 to 5/31/13]											
26	Develop EBAS Total Cost of Ownership (TCO) Estimate	2 days	Thu 5/30/13	Fri 5/31/13	[Gantt bar from 5/30/13 to 5/31/13]											
27	Define Implementation Tasks and Timeline	2 days	Thu 5/30/13	Fri 5/31/13	[Gantt bar from 5/30/13 to 5/31/13]											
28	Final Report	12 days	Wed 6/5/13	Thu 6/20/13	[Gantt bar from 6/5/13 to 6/20/13]											
29	Develop/Deliver Final Report	12 days	Wed 6/5/13	Thu 6/20/13	[Gantt bar from 6/5/13 to 6/20/13]											





7 References

Davidson Services has an unbroken record of successfully performing projects for our clients. In the eleven years since our founding, all of our clients have been happy to serve as references for us. The following references are districts of similar size and/or reflect work efforts germane to TUSD's requirements.

Client Name & Contact Information	Description of Project
<p>Lake Erie Educational Computer Association (LEECA)</p> <p>1885 Lake Avenue Elyria, OH 44035</p> <p>Mr. Lloyd Wright Executive Director (440) 324-3185 x1153</p> <p>lloyd.wright@nccohio.org</p>	<p>Needs Assessment and Selection of a new Student Information System</p> <ul style="list-style-type: none"> • Needs Assessment/Requirements Definition, • RFP Development, • Vendor Demonstrations, • Product Selection
<p>Akron Public Schools</p> <p>70 North Broadway Akron, OH 44308</p> <p>Ms. Debra Foulk Executive Director of Business Affairs (330) 761-2805</p> <p>dfoulk@akron.k12.oh.us</p>	<p>Needs Assessment, Selection and Implementation of new SIS, ERP and Assessment Management systems.</p> <ul style="list-style-type: none"> • Needs Assessment/Requirements Definition, • Process Re-engineering, • RFP Development, • Business Case Development, • Vendor Demonstrations, • Contract Negotiations, • Project Management Services, • Implementation Services, and • Post Production Support



Client Name & Contact Information	Description of Project
<p>Columbus City Schools Ms. Penny Rucker, CFO (614) 365-6400 prucker@columbus.oh.k12.us</p>	<p>Project Management and ERP Implementation Services.</p> <ul style="list-style-type: none"> • Project Management Services • Implementation and Training Services, • Systems Integration Design and Development • Report Writing, and • Post Production Support
<p>McKinney Independent School District #1 Duvall Street McKinney, TX 75069 Mr. Allen McDaniel Senior Director of Technology Services (469) 742-4081 amcdaniel@mckinneyisd.net</p>	<p>Solution Evaluation/ Selection and Implementation Services for ERP and Student Information Systems</p> <ul style="list-style-type: none"> • Requirements Definition • Process Review, • RFP Development, • Technology Evaluation, • Vendor Demonstrations, • Contract Negotiations, and • Project Management • Implementation Consulting



8 Costs

The following provides a breakdown of the costs for the proposed services. In addition, travel expenses are estimated at \$4,000. Total estimated project cost (to include travel) is \$47,520.

Task	Task Description	Hours	Estimated Cost
	Develop Project Schedule and Track Progress	28	\$ 4,760.00
1	Develop the Project Schedule and Documents	4	\$ 680.00
2	Manage Project	24	\$ 4,080.00
	Conduct Needs Assessment	84	\$ 14,280.00
1	Identify Needs Assesment Participants/Schedule Meetings	2	\$ 340.00
2	Review USP Documents and Develop Draft EBAS Requirements	20	\$ 3,400.00
3	Prepare for and Conduct Needs Assessment Meetings	54	\$ 9,180.00
4	Prepare Needs Assessment Summary Report	8	\$ 1,360.00
	Conduct Market Research	34	\$ 5,780.00
1	Conduct Market Research - Districts	10	\$ 1,700.00
2	Conduct Market Research - Vendors/Products	24	\$ 4,080.00
	Develop Request for Information (RFI)	64	\$ 10,880.00
1	Produce RFI Requirements Checklist	10	\$ 1,700.00
2	Prepare RFI Document	26	\$ 4,420.00
3	Summarize RFI Responses	28	\$ 4,760.00
	Define Acquisition and Implemenation Strategy/Final Report	46	\$ 7,820.00
1	Develop EBAS TCO Estimates	16	\$ 2,720.00
2	Develop Implement Plan and Timeline	10	\$ 1,700.00
2	Develop EBAS Final Report	20	\$ 3,400.00
	TOTAL	256	\$ 43,520.00



Statement of Work
for
Unitary Status Plan (USP)
Evidence Based Accountability System (EBAS)
Reporting and Monitoring
Consulting Services

prepared for



TUCSON UNIFIED SCHOOL DISTRICT #1
1010 E. 10th Street
Tucson, AZ 85719

May 1, 2013



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1 Executive Summary

Tucson Unified School District # 1 (TUSD) has contracted with Davidson Services, LLC to provide professional consulting services supporting the implementation of the District's recently approved "Unitary Status Plan" (USP). Consulting services to be offered include product research, discovery and facilitation of contacts with other K-12 school districts with similar needs, TUSD requirements determination, and preparation for acquisition of software and services to meet TUSD's requirements under the USP. The District expects the engagement to begin immediately upon contract award and conclude not later than June 30, 2013.

Among several USP implementation projects is a two-part initiative that focuses heavily on collection and reporting of data (i.e. "evidence") that TUSD is meeting both integration and achievement goals set forth in the USP. More specifically, the two parts are described as follows:

1. TUSD must plan and implement an "Evidence-Based Accountability System" (EBAS) which is an online, district-wide data system providing collection and integration of multi-source data that supports review of the effectiveness of academic and support programs and ensures that program changes and student interventions address racial segregation and improve the academic performance and quality of education for certain ethnic and cultural groups.

The overall intent for EBAS is to provide transparency and accountability for academic achievement and related interventions and support services for students throughout the district. To that end, EBAS must enable the setting of achievement and behavior expectations at an individual student level and provide the ability to track progress of students toward meeting those expectations.

EBAS must also provide direct support for the identification of students "at risk" and the tracking of interventions taken to address those students' needs.

2. TUSD must implement Monitoring and Reporting capabilities in support of the many programs and practices specified for implementation within the USP. While these monitoring and reporting capabilities are not, strictly speaking, part of EBAS there is at least a strong connection among them and potentially some overlap in requirements that the District must rationally address as part of the EBAS project.



2 Davidson Services Responsibilities

The following sections describe the tasks Davidson Services personnel will perform to provide professional consulting services supporting the implementation of the District's recently approved "Unitary Status Plan" (USP).

2.1 Plan and Manage the Project

2.1.1 Develop the Project Schedule and Track Progress

Description:

The objective of this task is to incorporate input from TUSD Project Sponsor and Project Manager to finalize the work approach, prepare a project plan, and establish the framework for status reporting and procedural and contractual activity. The Davidson Services Project Manager will be responsible for the following subtasks:

1. Work with the TUSD Project Manager to finalize the project statement of work and Project Plan
2. Prepare and submit bi-weekly project status reports to the TUSD Project Manager to include updating the project schedule
3. Coordinate with the TUSD Project Manager on scheduling and conducting project related interviews and focus groups.
4. Coordinate the review of project work products and deliverables with the Project Sponsor and Project Manager

Deliverables:

- Project Plan
- Project Status Reports

Completion Criteria:

This task will be complete when the Project Plan and final bi-weekly project status report has been delivered to the TUSD Project Manager.

2.2 Conduct Needs Assessment

2.2.1 Schedule Needs Assessment Meetings

Description:

Working with the TUSD Project Manager, Davidson Services will finalize plans for the number of needs assessment interviews and focus groups and their topics, and schedule the interviews and focus groups. Davidson Services proposes to conduct interviews with key EBAS stakeholders, district leadership, and key functional users.



It is assumed that no more than twenty (20) interview/focus group sessions will be conducted and that each session is conducted within a two (2) hour timeframe.

Deliverables:

- Proposed Interview Schedule

Completion Criteria:

This task will be complete when the Proposed Interview Schedule has been delivered to the TUSD Project Manager.

2.2.2 Define and Document Initial Requirements

Description:

Before the interviews and focus group sessions, Davidson Services will review documentation supporting the EBAS initiative to include the Initial Court Order, the Approved Unitary Status Plan (USP) and any USP updates. Subtasks performed in support of this task include the following.

1. Extract technical and functional requirements from USP specific documentation.
2. Identify areas/requirements requiring further clarification/definition.
3. Establish discussion topics and examples used for facilitating the interview/focus group sessions.
4. Begin building the technical and functional requirements to be used in future project tasks.

Deliverables:

- Draft EBAS Requirements Report

Completion Criteria:

This task will be complete when the Draft EBAS Requirements Report has been delivered to the TUSD Project Manager.

2.2.3 Conduct Needs Assessment Meetings

Description:

The purpose of this task is to conduct the needs assessment meetings as scheduled in Task 2.2.1 *Schedule Needs Assessment Meetings*. Up to twenty (20) interviews / focus group sessions will be conducted and each session will last no more than two (2) hours.

Deliverables:

- None



Completion Criteria:

This task will be complete when the Interviews / Focus Groups have been conducted.

2.2.4 Prepare Needs Assessment Summary Report

Description:

The purpose of this task is to summarize findings from Task 2.2.3 *Conduct Needs Assessment Meetings* within the Needs Assessment Summary Report. The Needs Analysis Summary Report will:

- Document information collected about EBAS requirements in each of the areas covered by the Needs Assessment Meetings;
- Present a list of potential technical, functional and/or reporting gaps potentially keeping the district from meeting EBAS requirements; and
- Provide a list of EBAS expectations

Deliverables:

- Needs Assessment Summary Report

Completion Criteria:

This task will be complete when the Needs Assessment Summary Report has been completed and delivered to the TUSD Project Manager.

2.3 Prepare a Request for Information Document

2.3.1 Conduct Market Research

Description:

The purpose of this task is to conduct a number of research efforts to provide TUSD with a list of potential vendors, possible solutions and identification of districts, similar in size to TUSD that have implemented a similar EBSA solution. Subtasks to be performed include:

1. Identify districts of similar size that have successfully implemented systems delivering capabilities that are similar to the district's EBSA needs.
2. Identify potential vendors including Data Warehouse, Decision and Support, and Student Information System vendors that may have solutions that could address expectations of a TUSD EBSA
3. Determine availability of potential EBSA solutions through research of primary vendors and their products servicing the current marketplace.
4. Document the findings within the Education Data Warehouse Market Research paper.

Deliverables:



- Education Data Warehouse Market Research

Completion Criteria:

This task will be complete when the Education Data Warehouse Market Research paper has been completed and delivered to the TUSD Project Manager.

2.3.2 Develop Request for Information (RFI)

Description:

The purpose of this task is to create a RFI based on the technical and interface information collected during the Needs Assessment and market research collected within the Education Data Warehouse Market Research paper. Recommended sections for the RFI would include:

- TUSD EBAS Expectations
- Vendor Profile
 - Company overview
 - Product(s) Offered
 - K-12 Installation Base (Clients and District Size)
 - References
- Technical Requirements
 - System Architecture
 - Software Requirements (Modules and Third Party Software)
 - Hardware Requirements
 - Performance and Scalability
 - Customization and Reporting Tools
 - Interface Tools/Utilities
 - Security
 - Software Maintenance
 - Technical Support
- Implementation Methodology/Overview
- Pricing Model

The following subtasks will be completed:

1. Coordinate with TUSD's Purchasing staff to understand the process for release of an RFI, and any format and content TUSD uses for the RFI process.
2. Prepare a list of expectations for the EBAS RFI that contains information from the Needs Assessment Summary Report and the Education Data Warehouse Market Research paper.



3. Review the proposed RFI with appropriate TUSD parties and deliver the final RFI to the Purchasing Department
4. Provide a list of Vendor's to TUSD's Purchasing Department

Deliverables:

- EBAS RFI
- Potential EBAS Vendor List

Completion Criteria:

This task will be complete when the EBAS RFI has been accepted by the TUSD Project Manager and the RFI and Potential Vendor List have been provided to the TUSD Purchasing Department.

2.4 RFI Support and Evaluation

2.4.1 Assist with Responses to Vendor Questions

Description:

The purpose of this task is to provide assistance to answer any questions during the RFI process asked by potential vendor responders. TUSD Project Manager will summarize any questions where additional information is required and provide those to Davidson Services.

Deliverables:

- Responses to Vendor Questions

Completion Criteria:

This task will be complete when answers to questions provided by the TUSD Project Manager have been provided and the EBAS RFI due date has been reached.

2.4.2 Prepare Final Presentation

The purpose of this task is to summarize vendor RFI responses, results of the RFI process, and recommend next steps to meet the requirements of the Unitary Status Plan. The summary will be provided in a PowerPoint presentation and summarize each of the vendors and their solutions.

Deliverables:

- EBAS Summary Presentation

Completion Criteria:

This task will be complete when The EBAS Summary Presentation has been provided to the TUSD Project Manager.



3 Tucson Unified School District Responsibilities

The responsibilities listed in this section are to be provided at no charge to Davidson Services. Davidson Services' performance is predicated upon the following responsibilities being fully and timely fulfilled by TUSD personnel:

3.1 TUSD Project Manager

The TUSD Project Manager will have the authority to act for TUSD in all aspects of the contract. Davidson Services will address all communications requiring action including:

- Assisting in locating and approving the assignment of an office space and services as described in *Section 3.2 Office Space and Other Facilities*
- Authorizing change(s) to this Statement or Work per the process described in *Section 5 Change Authorization Process*, if the need arises
- Communicating the progress and results of the project to other TUSD executive staff as required
- Arranging schedules and meeting space for interviews and focus groups with TUSD personnel
- Providing information and decisions to Davidson Services personnel within three (3) business days unless both parties agree to a shorter or an extended response date
- Reviewing and approving or rejecting all deliverables within five (5) business days after receipt. Approval will be deemed to occur if notification of rejection is not received by the end of five (5) business days
- Resolving project issues and escalating issues within the TUSD organization as necessary

3.2 Office Space and Other Facilities

TUSD will provide office space, and all supplies, telephone, LAN, printer access and laptop projector required for a Davidson Services Consultant when working on-site. Davidson Services personnel will provide their own laptop computers.

3.3 Overtime Pay

TUSD will be responsible for any overtime pay that may be required for its personnel to oversee Davidson Services activities related to this project when agreed-to work is performed outside the standard business day or otherwise at times that require overtime.

3.4 Scheduling and Availability of TUSD Resources

TUSD will be responsible for scheduling personnel and providing and scheduling appropriate spaces for meetings as required to fulfill the requirements of this Statement of Work.



4 Estimated Schedule

Services to be performed under this Statement of Work are estimated to begin in April, 2013 and span a period of three (3) months, ending on or before July 31, 2013.

These dates are predicated on Davidson Services receiving a Purchase Order by April 15, 2013.

5 Change Authorization Process

Davidson Services recognizes that, with any technology related projects, changes can and do occur. Following fundamental project management processes, Davidson Services personnel are trained to keep changes to a minimum and projects on schedule. When changes are required however, new and/or additional tasks will be documented, costs estimated and impact on schedule determined. The results of this work will be presented to the TUSD Project Manager and if accepted, TUSD will sign a change order. Work will not begin on any changes until Davidson Services receives authorization from TUSD in the form of a signed Change Order and an amended purchase order.

5.1 Completion Criteria

Davidson Services shall have fulfilled its obligations under this Statement of Work when any one of the following first occurs:

- Davidson Services completes the work described in the "Davidson Services Responsibilities" section;

or

- Fiscal funding is not approved and TUSD terminates the project before completion. TUSD will notify Davidson Services immediately and request a bill for all hours and expenses expended.



6 Charges

The following provides a breakdown of the costs for the proposed services. In addition, travel expenses are estimated at \$4,000. Total estimated project cost (to include travel) is \$47,520.

Task	Task Description	Hours	Estimated Cost
2.1	Plan and Manage the Project	28	4,760.00
2.1.1	Develop the Project Schedule and Track Progress	28	4,760.00
2.2	Conduct Needs Assessment	84	14,280.00
2.2.1	Schedule Needs Assessment Meetings	2	340.00
2.2.2	Define and Document Initial Requirements	20	3,400.00
2.2.3	Conduct Needs Assessment Meetings	54	9,180.00
2.2.4	Prepare Needs Assessment Summary Report	8	1,360.00
2.3	Prepare a Request for Information Document	70	11,900.00
2.3.1	Conduct Market Research	34	5,780.00
2.3.2	Develop Request for Information (RFI)	36	6,120.00
2.4	RFI Support and Evaluation	74	12,580.00
2.4.1	Assist with Responses to Vendor Questions	40	6,800.00
2.4.2	Prepare Final Presentation	34	5,780.00
	TOTAL	256	\$43,520.00

Needs Assessment Summary Report

Prepared for



TUCSON UNIFIED SCHOOL DISTRICT #1
1010 E. 10th Street
Tucson, AZ 85719

May 28, 2013





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1 Introduction

1.1 Background

Tucson Unified School District #1 (TUSD) is currently under Court-ordered Desegregation. Pursuant to that order, the Court appointed an independent party (the “Special Master”) to work with TUSD and other parties to the case to develop the Unitary Status Plan (USP). The USP is a document that directs TUSD to plan and implement a specified collection of programs, practices, and systems designed to ensure that TUSD attains and sustains an environment free of the vestiges of ethnic and race-based discrimination.

Among 13 USP implementation projects is a two-part initiative that focuses heavily on collection and reporting of data (i.e. “evidence”) that TUSD is meeting both integration and achievement goals set forth in the USP. More specifically, the two parts are described as follows:

- TUSD must plan and implement an “Evidence-Based Accountability System” (EBAS) which is an online, district-wide data system providing collection and integration of multi-source data that supports review of the effectiveness of academic and support programs and ensures that program changes and student interventions address racial segregation and improve the academic performance and quality of education for certain ethnic and cultural groups.

The overall intent for EBAS is to provide transparency and accountability for academic achievement and related interventions and support services for students throughout the district. To that end, EBAS must enable the setting of achievement and behavior expectations at an individual student level and provide the ability to track progress of students toward meeting those expectations.

EBAS must also provide direct support for the identification of students “at risk” and the tracking of interventions taken to address those students’ needs.

- TUSD must implement Monitoring and Reporting capabilities in support of the many programs and practices specified for implementation within the USP. While these monitoring and reporting capabilities are not, strictly speaking, part of EBAS there is at least a strong connection among them and potentially some overlap in requirements that the District must rationally address as part of the EBAS project.

TUSD hired Davidson Services to conduct an assessment of the District’s needs regarding implementation of EBAS. To accomplish that needs assessment, Davidson Services scheduled 2 hour sessions with 13 groups of TUSD personnel to review the specific data reporting and monitoring requirements for each of the proposed USP projects initiated within the district (see figure 1.1-A). During these open sessions, information was collected to document:



-
- ✓ Data elements required to be collected and reported for USP
 - ✓ Availability (or non-availability) of the data required for reporting within existing TUSD information systems
 - ✓ Proposed processes to collect and report on the data
 - ✓ Ownership of the data within the group
 - ✓ Any edits, re-work, or other manual efforts needed to manipulate the data to generate reports in the format required by the USP



Interview Schedule					
Date	Monday, May 20, 2013	Tuesday, May 21, 2013	Wednesday, May 22, 2013	Thursday, May 23, 2013	Friday, May 24, 2013
Time		Blue Room 8 am - 10 am	TS Conference 8 am - 10	Blue Room 8 am - 10	TS Conference 8 am - 10
Contact		Brian Lambert	Rick Haan	Adele Edwards	Pat Cisneros
Project		P7 - Discipline and ECA	P13 - Monitoring and Reporting	P13 EBAS and M&R	P6 - Environments and Culture
Time		TS Conference 10 am - noon	Grey Room 10 am - noon	Blue Room 10 am - noon	TS Conference 10 am - 11
Contact		Brian Lambert	Nonie Faras	Nonie Faras	
Project		P5 - Student Engagement	P11 - USP Operations and Budget	P3 - Magnets	
Time	Blue Room 1 pm - 3 pm	Grey Room 1 pm - 3 pm	Blue Room 1 pm - 3 pm	Grey Room 1 pm - 3 pm	
Contact	Teresa Guerrero	Christina Vasquez-Case	Marcus Jones	Kevin Startt and Diana Kerfoot	
Project	P8 - Family Engagement	P1 - Personnel, Hiring and Recruitment	P9 - Facilities Access	Purchasing Department	
Time	Blue Room 3 pm - 5 pm	Grey Room 3 pm - 5 pm	Blue Room 3 pm - 5 pm	Grey Room 3 pm - 5 pm	
Contact	Richard Foster	Noreen Wiedenfeld	Rick Haan	Adele Edwards	
Project	P12 - Professional Development	P2 - Transportation and Boundary	P4 - Advanced Learning Experiences	P10 - Tech Access	

Figure 1.1-A

1.2 Report Organization

This Needs Assessment Summary Report has been organized to present the findings for each of the 13 projects reviews which were performed. The report has a section for each project, and each section has the following subsections:

- ✓ List of TUSD personnel who participated in the fact finding interviews
- ✓ Summary of the data elements required by the USP
- ✓ Ownership of the data and date when first report will be available
- ✓ Availability of Tools or Data Systems that can provide some or all of the required data
- ✓ Amount of preparation work that must be done to manipulate the data or add missing elements to meet the USP requirements
- ✓ Overall assessment of the readiness of each group to meet the USP reporting due dates



2 Executive Summary

Over a 5 day period, approximately 70 Tucson Unified School District (TUSD) personnel associated with 13 projects defined within the Unitary Status Plan (USP) were interviewed regarding the status of their required reports and the data needed to produce these reports. Before the interviews, each Project team was provided with the reporting requirements specified in the USP as well as a series of questions to evaluate their ability to meet USP deadlines and identify data which would be needed.

2.1 Project Readiness Indicator

Based on 2 hour long interviews with project members, the teams' responses to written questions, and discussions during the interviews, a "readiness indicator" was developed. This indicator was developed as a summary evaluation of the teams' ability to meet deadlines specified in the USP, and to report on data required by the USP. Each project was rated as:

- **Good** – Has the vision, plan, and has activities underway (completed some or all of the requirements in their section) to meet the USP responsibilities
- **Fair** – Has a vision but the plan may be lacking some details and/or data has been identified but demands a large amount of manual manipulation to meet reporting requirements.
- **At Risk** – Vision is incomplete. Data is very limited and may not exist. Due dates for actions have passed or are approaching quickly with little or no apparent progress.

The following table summarizes the evaluation of each project's ability to meet established USP deadlines and reporting requirements:

Project	Project Description	Readiness Assessment		
1	Personnel, Hiring, & Recruitment		Fair	
2	Boundary	Good		
2	Transportation		Fair	
3	Magnets	Good		
4	Advanced Learning Experiences (ALE)	Good		
5	Student Engagement and Support		Good	Fair
6	Environments and Culture	Good		
7	Discipline		Fair	
8	Family Engagement			At Risk
9	Facilities Access	Good		



Project	Project Description	Readiness Assessment		
10	Tech Access			At Risk
11	USP Operations and Budget		Fair	
12	Professional Development		Fair	
13	Monitoring and Reporting		Fair	

The common problem facing all the Fair and At Risk rated projects was the lack of a data reporting and tracking system whose results could be reviewed, analyzed, and produced in a systematic way. Data is generally available (see next section for exceptions) but producing the required reports in the specified formats demands an increasing amount of manpower, especially if data is to be analyzed more often than dictated by the USP. The lack of an effective tracking and reporting system requires staff effort to be spent on producing reports instead of on analyzing data and using the knowledge gained to make a difference for students.

2.2 District Data Collection and Tracking System Requirements

As part of the Unitary Status Plan, TUSD has the responsibility to identify needed changes and additions to existing systems so that reporting and monitoring can be done (Section X Accountability and Transparency, A – Evidence-Based Accountability, Item 2):

BY APRIL 1, 2013, THE DISTRICT SHALL HIRE OR DESIGNATE A DISTRICT OFFICE EMPLOYEE TO CONDUCT A REVIEW AND ANALYSIS OF THE CURRENT CAPACITY OF MOJAVE AND ANY OTHER DISTRICT DATA COLLECTION AND TRACKING SYSTEM. SUCH REVIEW AND ANALYSIS SHALL DETERMINE THESE DATA SYSTEM(S)' ABILITY TO: (A) TRACK INDIVIDUAL STUDENT DEMOGRAPHIC, ACADEMIC, AND BEHAVIORAL DATA PURSUANT TO THE REQUIREMENTS SET FORTH IN APPENDIX A; (B) BE COMPATIBLE WITH AND RUN REPORTS CONCURRENTLY WITH THE DISTRICT'S DATA SYSTEM(S) FOR TRACKING PERSONNEL DATA AND INFORMATION; AND (C) AUTOMATICALLY PRODUCE ALERTS, FLAGS, AND OTHER PROGRAMMED SIGNALS TO INDICATE WHEN STUDENTS DO NOT MEET PRE-DETERMINED GOALS OR EXPECTATIONS FOR ACADEMIC PERFORMANCE OR BEHAVIORAL CONCERNS. BY JULY 1, 2013, THE DISTRICT SHALL COMPLETE SUCH REVIEW AND ANALYSIS, WHICH SHALL INCLUDE AN ESTIMATED TIMELINE AND COST FOR MAKING NECESSARY ADJUSTMENTS TO THE DISTRICT'S DATA SYSTEMS. BY OCTOBER 1, 2013, THE DISTRICT SHALL HIRE OR CONTRACT FOR APPROPRIATE EXPERTS TO ADD TO OR AMEND THE DISTRICT'S DATA SYSTEM(S) TO ALLOW IT TO PERFORM THE FUNCTIONS DESCRIBED IN SECTION (X)(A)(1)-(5). BY JANUARY 1, 2014, OR AS SOON THEREAFTER AS IS REASONABLY POSSIBLE BASED ON PROJECTIONS BY THE DISTRICT AND ITS EXPERTS, THE DISTRICT



SHALL MAKE SUCH CHANGES TO ITS DATA SYSTEMS TO ALLOW IT TO PERFORM THESE FUNCTIONS. THE COMPLETED AMENDED SYSTEM SHALL BE KNOWN AS THE EVIDENCE-BASED ACCOUNTABILITY SYSTEM ("EBAS").

The results of the interviews and analysis of reporting needs have identified the following needs or gaps in TUSD's information systems, grouped by the information system that is (or should be) the source for the required data:



2.2.1 Mojave Needs

Item	Need Description	Projects Requiring Data	Estimated Effort to Resolve
1	Parent engagement information – Requires the ability to track by student contact with parents and/or guardians across multiple areas. Should have the ability to select parent/guardian (or add additional parent/guardian information); allow definable codes to describe the type of contact; time spent with parents; type of service provided; and free form notes. This area could also be combined with requirement to track complaints and resolution of those complaints.	P2, P3, P4, P5, P8	High
2	Discipline data needs to have Ethnicity normalized to match the requirements of the USP.	P7	Medium
3	Discipline reports need to be available for District-wide, Location, and “Reported by” reports. Currently these options are grayed out on the report writer. It is currently taking 2 person weeks to generate discipline reports each quarter.	P7	Low
4	Discipline reports sorted by the user who reported each incident need to be created. This data can currently only be generated by printing incidents for one “REPORTED BY” employee at a time.	P7	Medium
5	Discipline has an Intervention Block on the incident record but it is free-form and needs to be replaced by a pull-down list with user selectable codes to describe reportable intervention strategies. Grant Tracker has this capability but it is not the solution since it does not interface with the SIS or the TUSD	P7	Medium



Item	Need Description	Projects Requiring Data	Estimated Effort to Resolve
	Stats system.		
6	Discipline screen needs to have additional disposition codes added to handle appeals and the recording of the disposition on an appeal.	P7	Low
7	Open Enrollment/Gate/etc. application ID needs to be linked to placement ID.	P2, P5	Medium
8	There needs to be additional business rules/edits on application date and received date built into the system to avoid data anomalies and invalid date combinations.	P2, P5	Low
9	Need additional status codes on renewal and neighborhood school.	P2	Low
10	There are many "stalled status" records due to multiple enrollment records. If a student is enrolled, all other records should be inactivated.	P2	Medium
11	Itinerant GATE, Middle/High School pullout, and non-self-contained students should be flagged automatically in Mojave with a GATE flag if a student took the GATE test.	P4	Medium
12	The system lacks the ability to set thresholds for Attendance, Grading, and Absences and to automatically notify a teacher/administrator/councilor when that threshold is reached	P5	Medium
13	A new Grade Book application should be considered since there is no link between "Making the Grade" and Mojave, and the current Grade Book is at risk of being unsupportable.	P5	Medium



2.2.2 PeopleSoft (HR) Needs

Item	Need Description	Projects Requiring Data	Estimated Effort to Resolve
1	Years of experience (inside and outside district) needs to be collected and tracked (No program modifications are needed. The system functionality is not currently being used.)	P1	Low
2	Required professional development tracks for employees should be set, and professional development classes attended should be tracked in truenorthlogic. That data also needs to be uploaded to PeopleSoft for reporting and analysis.	P1	Low
3	Teacher evaluations should be tracked in Teacherscape and uploaded to PeopleSoft for reporting and analysis.	P1	Medium
4	The Sigma Applicant Tracking system should be interfaced to PeopleSoft to upload hiring information for inclusion in an employee's record.	P1	Low
5	Position movement of teachers (transfers within a building/program; voluntary re-assignments within a building, etc.) are not being tracked by Human Resources except for some information entered into an Excel worksheet. This should be tracked in PeopleSoft.	P1	High
6	"Reductions in Force" has no indicator to show that an employee was hired under a USP project and therefore has rights to be excluded from potential RIF(s) for up to 3 years.	P1	Low
7	Resources are not easily tracked back to a location/program when completing reports for ALE. Need some non-manual method to identify resources assigned	P4	High



Item	Need Description	Projects Requiring Data	Estimated Effort to Resolve
	to a program/location.		
8	Need exception reporting for specific criteria, i.e. provide a list of Highly Qualified Teachers that have certifications in Language Arts or Social Studies. (also #1 in TUSD Stats)	P6	Medium

2.2.3 Lawson (Financial) Needs

Item	Need Description	Projects Requiring Data	Estimated Effort to Resolve
1	Payroll actual employee data is no longer tracked in detail within the General Ledger since Lawson Financials has replaced PeopleSoft Financials. Employees must go back to PeopleSoft for this and then have to combine it with the original project budget to produce budget-to-actual financial reports.	P10	High

2.2.4 Sigma Applicant Tracking Needs

Item	Need Description	Projects Requiring Data	Estimated Effort to Resolve
1	Applicant Tracking system has no way to track interview committees,	P1	High



Item	Need Description	Projects Requiring Data	Estimated Effort to Resolve
	interviewer demographic information, questions, scoring, and other data required by the USP.		

2.2.5 Truenorthlogic (Professional Development Tracking) Needs

Item	Need Description	Projects Requiring Data	Estimated Effort to Resolve
1	Need the ability to create professional development requirements for an employee and then track what courses were taken to satisfy the professional development requirements.	P11	High
2	Need the ability to associate demographic information on a teacher/instructor record. Also need the ability to specify if an instructor is internal or external. Credentials on an instructor are not tracked within truenorthlogic.	P11	Medium

2.2.6 TUSD Stats Needs

Item	Need Description	Projects Requiring Data	Estimated Effort to Resolve
1	Need exception reporting for specific criteria, i.e. provide a list of Highly	P6	?



Item	Need Description	Projects Requiring Data	Estimated Effort to Resolve
	Qualified Teachers that have certifications in Language Arts or Social Studies. (also #7 within PeopleSoft)		
2	Need ability to define and schedule standard, repeatable reports, i.e. ethnic breakdown % by district compared to ethnic breakdown at a school location compared to ethnic breakdown within a specific program or course	P6	

2.2.7 Other Systems Needs

Item	Need Description	Projects Requiring Data	Estimated Effort to Resolve
1	Educational Suitability Score (ESS) and Technology Index indicator should be created and maintained on a district-wide system, preferably using SQL or some system purchased to track this.	P9, P10	Medium
2	Grade Book must be replaced since the current "Making the Grade" program is no longer supported and has become nearly unsupportable by district resources.	P5	High



3 P1 – Personnel, Hiring, and Recruitment

The USP requires TUSD to enhance the racial and ethnic diversity of its administrators and certificated staff through its recruitment, hiring, assignment, promotion, pay, demotion and dismissal practices and procedures.

3.1 TUSD Participants

Participants interviewed for the P7 – Extracurricular project included:

- ✓ Pam Pelmo
- ✓ Martha Peyton
- ✓ Christina Vasquez-Case
- ✓ Nonie Faras
- ✓ Nicole Lowry
- ✓ Karen Gutierrez

3.2 Data Reporting and Monitoring Requirements

The following data reporting is required in this area and falls under the responsibility of Pam Pelmo:

Item	Data Reporting Requirements	USP Section	Due Date
1	Hire or designate a director-level employee to coordinate personnel recruitment efforts	IV B 2	04/01/13
2	Hire or designate a director-level employee to coordinate professional development and support efforts.	IV B 3	04/01/13
3	Develop and implement a plan to recruit qualified African American and Latino candidates for open administrator and certificated staff positions.	IV D 1	
4	Ensure interview committees for the hiring of administrators and certificated staff include African American and/or Latino members. For school site-level hiring, the principal shall submit to Human Resources the names and race/ethnicity of the members of each interview panel.	IV C 1	
5	Each interview committee shall utilize a standard interview instrument with core uniform questions to be asked of each candidate that applied for that position and a scoring rubric.	IV C 3	



Item	Data Reporting Requirements	USP Section	Due Date
6	Identify why individuals who are offered positions do not accept them, to the extent such applicants respond to such post-offer inquires	IV C 4	
7	Identify significant disparities (i.e. more than a 15% variance) between the percentage of African American or Latino certificated staff or administrators at an individual school and district-wide percentages for schools at the comparable grade level.	IV E 2	
8	Develop a pilot plan to support first year teachers serving in schools where student achievement is below the District average.	IV E 6	07/01/13
9	Evaluate whether there are disparities in the attrition rates of African American and Latino administrators or certificated staff compared to other racial and ethnic groups. Assess the reason(s) for these disparities and develop a plan to take appropriate corrective action.	IV F a	01/01/13
10	Surveying teachers each year on overall job satisfaction and their interest in continuing to work for the District disaggregating results by race, ethnicity, and school site.	IV F b	Annually
11	Conduct biannual focus groups of representative samples of certificated staff to gather perspectives on the particular concerns of these staff in hard-to-fill positions.	IV F c	Bi-Annually
12	Develop a Reductions in Force (RIF) plan which takes into account the desegregation obligations for any RIF requiring the dismissal of administrators and/or certificated staff who have been hired to fulfill a need specifically identified within the USP.	IV G 1	02/01/13
13	Administrators and certificated staff who have been hired to fulfill a need specifically identified in the USP and are meeting performance and conduct standards will not be subject to a RIF for at least 3 full school years after date hired.	IV G 2	
14	Review, amend and adopt teacher and principal evaluation instruments.	IV H 1	07/01/13



Item	Data Reporting Requirements	USP Section	Due Date
15	Amend New Teacher Induction Program (NTIP) to provide new teachers (teachers in their first 2 years of teaching) with the foundation to become effective educators.	IV I 1	07/01/13
16	Develop a plan for and implement strategies to support underperforming or struggling teachers	IV I 2	07/01/13
17	Develop and implement a plan for the identification and development of prospective administrative leaders, specifically designed to increase the number of African American and Latino principals, assistant principals, and District Office administrators.	IV I 3	07/01/13
18	Provide appropriate training for all school site principals to build and foster professional learning communities among teachers.	IV I 4	10/1/13
19	For all administrator and certificated staff vacancies, identify the school where the vacancy occurred; date of vacancy; position to be filled; number of applicants; number of applicants interviewed; disaggregated by race; date position was filled; person selected; and for any vacancy that was not filled, the reason(s) the position was not filled.	IV K 1 d i	Annual Report
20	Lists of interview committee participants for each open position by position title and school site disaggregated by race and ethnicity	IV K 1 d ii	Annual Report
21	List of all administrators and certificated staff delineated by position, school, grade level, date hired, total years of experience, all active certifications by school with comparisons to district-wide figures	IV K 1 d iii	Annual Report
22	List of administrators or certificated staff who chose voluntary reassignment by old and new position	IV K 1 d iv	Annual Report
23	List of administrators and certificated staff subject to a reduction in force, by prior position and outcome (new position or dismissal)	IV K 1 D v	Annual Report
24	Information regarding why individuals offered positions chose not to accept them	IV K 1 f	Annual Report



Based on these data reporting and monitoring requirements, the following data elements specific to Personnel, Hiring, and Recruitment must be tracked:

Data Element	Source	Date Available	Comments	Readiness Indicator
Interview Committees for positions		Not Available	Data currently not being tracked	
Scoring rubrics for hiring		Not Available	Data currently not being tracked	
Years of Experience (inside/outside district)		Not Available	Data currently not being tracked	
Voluntary Reassignments		Not Available	Data currently not being tracked	
Job Protection for 3 years for USP Positions		Not Available	Impacts RIF and not currently being tracked	

	Data readily available. No/little data manipulation needed.
	Data available but manual effort needed to merge data from multiple systems
	No data tracked or agreement on data points has not been finalized.

Human Resources has a variety of systems where data can be reported from:

- ✓ PeopleSoft – Contains basic personnel demographic information, certifications, hire date, job assignment. District owns other modules such as Recruitment which have not been implemented. Most personnel systems have exports available for basic employee demographic information.
- ✓ Access Data Base for Position Control – manually tracked. Data remains within the HR department.
- ✓ Sigma – Applicant Tracking System where applicants, new hire information, etc. is being stored. This system does not have the functionality to track interviews, ratings, and



- rubrics for hiring. No export of data to PeopleSoft is available. Sigma is a stand-alone system.
- ✓ Teachescape – New Administrator and Certificated staff performance evaluation system that meets State requirements and has resources and interventions correlated with ratings. This is a new system which was recently procured and has not yet been installed. HR anticipates that it will support interfaces with PeopleSoft.
 - ✓ truenorthlogic – Tracks professional development activities. Supports an employee download from PeopleSoft but not export back to PeopleSoft.

3.3 Overall Readiness Assessment



Human Resources has many tools and systems available to them to track data. The challenge in this area is the lack of integration between these systems which means there is no one system where required data can be consolidated and reported upon. As a result significant manual effort is required to prepare reports.

In the Hiring area, the Sigma Applicant Tracking System does not support the creation and management of interviews, tracking of applicant scoring, and development of common metrics for hiring. This has a major impact on the ability of HR to meet the USP reporting requirements for applicants.

Reporting on positions, RIF, new hires, etc. is in conflict with the Right of Assignment provisions found in the Principals contracts. Right of Assignment allows the principal to move personnel from any job to a new position at any time, as long as the employee has certifications that meet the requirements of the position. There are not requirements to report these job changes so a new hire for a teacher position specifically focused on USP areas could be reassigned to a non-USP position at any time by the principal. It is recommended that this provision be documented and evaluated for any impact on reporting and consistency on generated reports.

The Professional Development and Evaluation systems seem to be able to track the information required by the USP. However, ease of reporting is impacted by the lack of integration between these systems and the base HR system, PeopleSoft.

4 P2 – Boundary

The USP requires that students of all racial and ethnic backgrounds have the opportunity to attend an integrated school. The District is required to use 4 strategies for assigning students to schools:

- ✓ Attendance boundaries
- ✓ Pairing and clustering of schools



- ✓ Magnet schools and programs
- ✓ Open Enrollment

4.1 TUSD Participants

Participants interviewed for the P2 – Boundary project included:

- ✓ Gail Farren
- ✓ Martha Zamora
- ✓ Pat Zisneros
- ✓ David Scott
- ✓ Noreen Wiedenfeld
- ✓ Briant Nodine

4.2 Data Reporting and Monitoring Requirements

The following data reporting is required in this area and falls under the responsibility of David Scott:

Item	Data Reporting Requirements	USP Section	Due Date
1	Hire or designate a director-level employee who shall supervise the implementation of all student assignment strategies	II C 1	01/15/13
2	Develop and implement a Magnet school and program strategy to enhance the integrative and educational quality of magnet schools and programs	II C 2 II E 3	04/01/13
3	Review current attendance boundaries and feeder patterns and amend such boundaries and patterns and/or provide for the pairing and/or clustering of schools to promote integration of the affected schools	II C 3	04/01/13
4	If a non-magnet school is oversubscribed for two or more consecutive years, the District shall review the attendance Boundary	II C 4	Annually
5	A single application shall be developed for enrollment in the District. Parents shall submit this application to enroll their child(ren) by the deadline established by the district. This application will allow for both Open Enrollment and magnet school requests.	II G 1	2013-14 School Year
6	Track transfers of any District students to and from District	II H 1	2012-13



Item	Data Reporting Requirements	USP Section	Due Date
	schools, charters, private schools, home schooling and public school districts outside the district		School Year
7	Review and revise its strategies for the marketing to and recruitment of African American and Latino students to District schools	II I 1	
8	Develop a web-based interface for families to learn about schools and submit application(s) online	II I f	
9	Disaggregated list with number and percentage of students at each school and district-wide	K 1 a	
10	Disaggregated list of students attending schools other than their attendance boundary schools, by grade, sending school, receiving school and whether such enrollment is pursuant to open enrollment or to magnet programs or schools.	K 1 b	

Based on these data reporting and monitoring requirements, the following data elements specific to Boundary must be tracked:

Data Element	Source	Date Available	Comments	Readiness Indicator
Business rules on Applications	Mojave	Additional edits	Nearly all data is available for Student Assignment. However, quality of data could be improved and additional edits would help.	
Student Application ID and Placement ID should be linked	Mojave	Not Available	Today, A&R has developed elaborate scripts to attempt to connect these two data records. They should have an ability to do this automatically.	
Additional Status Codes		Need to be added	Status codes indicating a neighborhood school and/or renewal. This data is not currently tracked directly today.	



Data Element	Source	Date Available	Comments	Readiness Indicator
Clean up routines		Need to be added	Enrollment request cleanup routines are needed. For example, If a student is enrolled in a Magnet School, routines should exist to remove all other enrollment requests for the student for this year.	

	Data readily available. No/little data manipulation needed.
	Data available but manual effort needed to merge data from multiple systems
	No data tracked or agreement on data points has not been finalized.

TUSD has been working on improvements in this area for about 8 years and they have made very good progress in developing systems to support their needs. Reporting has also been developed to support the requirements of the USP plan. Nearly all reports can be produced from the data collected today.

However, data quality is still a continuing concern. Although it has improved greatly, additional edits within Mojave would definitely help remove exceptions that have to be manually addressed today.

4.3 Overall Readiness Assessment



Due to the sophistication and the skills available to produce nearly all reports within the existing systems, this area has been rated Good.

5 P2 – Transportation

The USP requires the District to utilize transportation services as a critical component of the integration of its schools.

5.1 TUSD Participants

Participants interviewed for the P2 – Transportation project included:

- ✓ Brian Lambert



✓ Herman House

5.2 Data Reporting and Monitoring Requirements

The following data reports are required in this area and fall under the responsibility of Herman House:

Item	Data Reporting Requirements	USP Section	Due Date
1	Identify and implement any changes necessary to enable TUSD to include the transportation each student receives in each student's data dashboard entry	III B 1	07/01/13
2	Include data on student use of transportation, disaggregated by school attended and grade level	III C	Annual Report

Based on these data reporting and monitoring requirements, the following data elements specific to Transportation must be tracked:

Data Element	Source	Date Available	Comments	Readiness Indicator
Transportation Eligibility	Mojave	Not Available	Transportation is available only at the request of the school and is not tracked for extracurricular activities, except for Sports and off school premises events.	
Transportation Use	Not Available	Not Available	The use of transportation has never been tracked in the district and there is no current method that could be implemented without severe impact on time. Eligibility and assignment to buses can and is tracked.	

	Data readily available. No/little data manipulation needed.
	Data available but manual effort needed to merge data from multiple systems



	No data tracked or agreement on data points has not been finalized.
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Transportation eligibility is determined by data within Mojave and scheduling is done through the MapNet transportation system. Eligibility can be easily tracked but usage is problematic. There is no physical way to track when students use transportation services short of having them sign or badge in when they board a bus to record their presence.

Recording transportation for extracurricular activities has not yet been defined. Free bus service is currently available for all high schools at the request of the schools. However, this is not tracked down to a student basis.

5.3 Overall Readiness Assessment

	Fair
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Nearly all reporting requirements can be met by the current system in tracking transportation eligibility and assignments. Work must continue on extracurricular activities. The District should discuss exactly what “use” can and should be tracked.

6 P3 – Magnets

TUSD will continue to implement magnet schools and programs as a strategy for assigning students to schools and to provide students with the opportunity to attend an integrated school. A magnet school or program is one that: focuses on a magnet theme, such as a specific academic area, a particular career or a specialized learning environment; attracts students of diverse racial and ethnic backgrounds; and encourages students to choose a school other than their attendance boundary school to participate in the magnet theme offered at that program or school.

6.1 TUSD Participants

Participants interviewed for the P3 – Magnets project included:

- ✓ Vicky Callison
- ✓ Nonie Faras

6.2 Data Reporting and Monitoring Requirements

The following data reporting is required in this area and falls under the responsibility of David Scott:

Item	Data Reporting Requirements	USP Section	Due Date
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Item	Data Reporting Requirements	USP Section	Due Date
1	Hire or designate a director-level employee who shall be responsible for developing and implementing a comprehensive magnet school and program strategy for the District to enhance the integrative and educational quality of magnet schools and programs	II C 2	02/01/13
2	Access Magnet schools and programs	II C 2	Annually
3	Hire or designate an individual or individuals to assist in the effective implementation and operation of the magnet schools and programs, including working with school-based personnel and developing and administering and admissions process to ensure integration of magnet schools and programs	II C 2	
4	Meet the definition of an integrated school for all magnet schools and programs by recruiting a racially and ethnically diverse student body to ensure its magnet schools are integrated to the greatest extent practicable.	II E 2	
5	Develop a Magnet School Plan, taking into account the findings of the 2011 Magnet School Study, and ensuring that this Plan aligns with its other student assignment strategies and recruitment efforts. Address (i) how, whether, and where to add new sites to replicate successful programs and/or new magnet themes and additional dual language programs; (ii) improve existing magnet schools and programs that are not promoting integration and/or educational quality; (iii) consider changes to magnet schools or programs that are not promoting integration and/or educational quality, including withdrawal of magnet status; (iv) determine if each magnet school or school with a magnet program shall have an attendance boundary; (v) determine admissions priorities / criteria for each magnet school or program and a process for review of those criteria; and (vi) ensure that administrators and certificated staff in magnet schools and programs have the expertise and training necessary to ensure successful implementation of the magnet.	II E 3	04/01/13
6	Implement elements of the Plan in the 2013-14 school year, and fully implement the Plan in the 2014-15 school year.	II E 4	2013-14 2014-15



Based on these data reporting and monitoring requirements, the following data elements will be used to track progress on Magnet Schools and will be owned by Vicky Callison:

Data Element	Source	Date Available	Comments	Readiness Indicator
Integration Status	A&R / Mojave	Now	This information is available from A&R and Mojave based on enrollment statistics	
Attracting target demographics to achieve integration	A&R / Mojave	Now	Baseline done in 2012-13 and will measure growth in targeted demographics for each magnet school. Did this measurement on Pilot schools in 2012-13	
Theme	School Profile and tracked manually	In process	Total of 22 Magnet Schools in place with 6 being true Magnets. Developing others within 3 years.	
Congruent and continuous curriculum	Manually tracked	Yes	Done through site visits; Lesson Plan reviews. Training coordinators within the school.	
Professional Development Requirements	True North Logic	Yes	45 hours required for all teachers and administrators in the theme area. 30 hours required on pedagogy, cultural diversity and methods of instructional delivery.	
Students immersed in theme for 3 hours a day	Review of Lesson Plans and class enrollments from Mojave	Yes		
Theme integration into all aspects of the curriculum	Reviewing lesson plans and collecting 2 sample plans monthly now for 3 pilot schools.	Yes	Training school coordinators in process to review and report. Created observation instruments which allow an evaluation of classroom integration, lessons, student	



Data Element	Source	Date Available	Comments	Readiness Indicator
			engagement and interaction.	
Recruiting and Marketing	Manually tracking and measuring enrollment gains	Yes	<ol style="list-style-type: none"> 1. Contracted with KVOA and the search engine to report emails, phone, and address of the population that access the web site. 2. Advertise on multiple types of advertising and found NPR works best. Least effective: bill boards, print 3. Recruiting through school parents hosting other potential parents/children 4. 23 speaking engagement / events in 2012-13 5. Using Child Care for siblings of Magnet schools as an enticement to attend center city schools. 	
Parent Engagement	Not available	N/A	Attempted to use Grant Tracker and did not meet needs. Tried manual and too cumbersome. Would like to consider adding a module in Mojave that had a parent screen with different contact categories which could be easily completed by teachers/others.	
Course mapping for Magnets	Began in 2012-13	Yes	Refining process in FY 14	

	Data readily available. No/little data manipulation needed.
	Data available but manual effort needed to merge data from multiple systems



No data tracked or agreement on data points has not been finalized.

Vicky presented a very creative plan focused on increasing enrollment within the Magnet schools. She has not seen the impact yet on meeting integration targets but enrollment has increased significantly in her pilot schools for 2012-13. She has more work to do to attempt to attract additional groups to the schools and has focused on parents, advertising, continual growth of the staff through rigorous professional development requirements, and monitoring. Six of the existing 22 name magnet schools have met their targets but 16 have not. Within the next two years, and with increasingly stronger and stronger corrective actions, if schools have not met their targets, the magnet status will be dropped.

6.3 Overall Readiness Assessment

 Good

This project has some very creative ideas to meet goals and is not focused just on reporting but on actions that have shown success. Vicky has tried different methods, measured their success, and dropped those that showed limited success.

7 P4 – Advanced Learning Experiences

The P4 – Advanced Learning Experiences project has a goal to improve the academic achievement of African American and Latino students in the District and to ensure that African American and Latino students have equal access to the District’s Advanced Learning Experiences.

ALEs include Gifted and Talented Education (GATE) programs; Advanced Academic Courses; and University High School (UHS). AACs include Pre-Advanced Placement, formally referred to as “Honors,” “Accelerated,” or “Advanced,” and any middle school course offered for high school credit; Advanced Placement courses; Dual-Credit courses; and International Baccalaureate courses.

7.1 TUSD Participants

Participants interviewed for the P4 – Advanced Learning Experiences project included:

- ✓ Rick Haan
- ✓ Diana Brena
- ✓ Chris Geolstein
- ✓ Juliet King
- ✓ Bob Rossi
- ✓ Kathy Jensen



- ✓ Natasha Conti
- ✓ David Niecikowski

7.2 Data Reporting and Monitoring Requirements

The following data reporting is required in this area and falls under the responsibility of Rick Haan:

Item	Data Reporting Requirements	USP Section	Due Date
1	Hire or designate a District Office employee to be the Coordinator of Advanced Learning Experiences (ALEs).	V A 2	04/01/13
2	Complete an assessment of existing ALE programs, resources, and practices in the District and at school site(s) which includes (i) a review of the ALEs offered at each school; the number of students enrolled in each ALE program at each school disaggregated by grade level, race, ethnicity, ELL status, resources available in each school for ALEs, annual budget and (ii) a determination of what, if any, gaps in ALE access exist and what, if any, barriers there are for students at each school site to enroll in and successfully complete ALEs offered at each school site.	V A 2 b	07/01/13
3	Develop the ALE Access and Recruitment Plan which include strategies to identify and encourage African American and Latino students, including ELL students, to enroll in ALEs; to increase the number of African American and Latino students, including ELL students enrolling in ALEs; and to support African American and Latino students, including ELL students, in successfully completing ALEs.	V A 2 c	10/01/13
4	Develop accessible materials describe the District's ALE offerings by content, structure, requirements, and location	V A 2 d i	
5	Hold community meetings and informational sessions regarding ALEs in geographically diverse District locations	V A 2 d iii	
6	Provide professional development to administrators and certificated staff to identify and encourage African American and Latino students, including ELL students, to enroll in ALEs	V A 2 d iv	
7	Assess the feasibility of testing all students at appropriate	V A 2 d v	



Item	Data Reporting Requirements	USP Section	Due Date
	grade levels and using multiple measures for selection to GATE and UHS		
8	Increase access to academic preparation programs such as AVID	V A 2 d v	
9	Provide weighted grades for pre-AP and AP students, offering free or reduced AP exam fees for low income students, offering to waive other participation fees for any ALEs, integrating AAC sessions into summer academies, and creating structures for peer mentoring and pairing, and the provision of resources for ALEs	V A 2 d v	
10	Design a complaint process to allow students and/or parent(s) to file complaints regarding practices that have the intent or effect of excluding students from enrollment, identification, admission, placement, or success in ALEs.	V A 2 e	
11	Implement the ALE Access and Recruitment Plan	V A 2 f	01/01/14
12	Increase the number and percentage of African American and Latino students, including ELL students, receiving GATE services by improving screening procedures for GATE services and placement in GATE services to ensure that students are identified, tested, and provided with GATE services in a fair and nondiscriminatory manner that does not have an adverse impact on any student based on his/her race, ethnicity or English language proficiency.	V A 3 a i	
13	Increase the number and quality of Gate Offerings to provide equal access and equitable opportunities for all students, including assessing the feasibility of adding or expanding GATE dual language programs	V A 3 a ii	
14	Assess whether the implementation of GATE services at school sites should be modified to increase access to GATE services and to avoid within-school segregation	V A 3 a iii	
15	Require all GATE teachers to be gifted-endorsed or to be in the process of obtaining gifted endorsement	V A 3 a iv	
16	Increase the number and percentage of African American and Latino students, including ELL students, enrolled in AACs by	V A 4 a i	



Item	Data Reporting Requirements	USP Section	Due Date
	improving identification, recruitment, and placement to ensure that students have access to AACs in a fair and nondiscriminatory manner		
17	Increase the number of AAC offerings, as appropriate, to provide equal access and equitable opportunities for all students to participate in these courses, including expanding the number of AP courses offered at District high school and the number of grades in which such courses are offered	V A 4 a ii	
18	Improve the quality of Pre-AP and AP courses by making these courses subject to audit by the College Board	V A 4 a iii	
19	Provide professional development to train all AAC teachers using appropriate training and curricula	V A 4 a iv	
20	Review and revise the process and procedures that it uses to select students for admission to UHS to ensure that multiple measures for admission are used and that all students have an equitable opportunity to enroll at University High School. Pilot admissions procedures for transfer students seeking to enter UHS during the 2013-14 school year and implement the amended procedures for all incoming students in the 2014-15 school year.	V A 5 a	04/01/13
21	Administer the appropriate UHS admission test(s) for all 7 th grade students	V A 5 b	
22	Require all counselors in all middle schools to review UHS admissions requirements with all students in 6 th and the beginning of 7 th grade and provide all students with application materials.	V A 5 c	
23	Conduct specific UHS-related outreach to students and parents about the program's offerings; encourage school personnel, including counselors and teachers, through professional development, recognition, evaluation and other initiatives, to identify, recruit and encourage African American and Latino students, including ELL students, to apply; and provide assistance for African American and Latino students including ELL students, to stay in and to be successful at UHS.	V A 5 d	



Item	Data Reporting Requirements	USP Section	Due Date
24	Pursue an Arizona DOE Office of English Language Acquisition Services approved reading block extension to provide access to rigorous mainstream courses and address the literacy needs of ELLs	VB 1	
25	Build and expand Dual Language programs in order to provide more students throughout the District with opportunities to enroll in these programs, including by encouraging new and current certificated staff with dual language certifications to teach in such programs and by focusing recruitment efforts on appropriately certified teachers.	VC 1	

Based on these data reporting and monitoring requirements, the following data elements specific to the USP must be tracked:

Data Element	Source	Date Available	Comments	Readiness Indicator
Enrollment	Mojave & A&R	NOW		
Resources / Teachers Assigned	Not Available since HR is not tracking this	Not Available	Nothing is done in PeopleSoft HR to track position assignments	
Itinerant GATE	Mojave	Not Available	GATE flag is used to track this, not Student enrollment. Pullout and self-contained can all be flagged automatically. Middle schools, high schools non-self-contained have to be flagged manually and an import would be desirable to do this	
Complaint Tracking	In process with new Web and SQL table	School year 2013-14	In development	

	Data readily available. No/little data manipulation needed.
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	Data available but manual effort needed to merge data from multiple systems
	No data tracked or agreement on data points has not been finalized.

Nearly all data is available for this area except for resources (teachers and other personnel assigned). Since HR is not tracking this data, it must be added manually.

7.3 Overall Readiness Assessment



The recording and tracking of information in this area has been in place and additions can be done without issue. Employees are very familiar with the program and data requirements and are engaged in recording the required data.

8 P5 – Student Engagement and Support

Per the USP, TUSD must improve the academic achievement and educational outcomes of the District’s African American and Latino students, including ELL students using strategies to close the achievement gap and eliminate the racial and ethnic disparities for these students in academic achievement, dropout and retention rates, discipline, and access to Advanced Learning Experiences.

8.1 TUSD Participants

Participants interviewed for the P5 – Student Engagement and Support project included:

- ✓ Brian Lambert
- ✓ Elaine House
- ✓ Debbie Ferryman
- ✓ Lynn Strizich
- ✓ Rick Haan
- ✓ Eugene Butler
- ✓ Roxanne Begay-James
- ✓ Jimmy Hart
- ✓ Israel Macias-Reyes

8.2 Data Reporting and Monitoring Requirements

The following data reporting is required in this area and falls under the responsibility of Brian Lambert:



Item	Data Reporting Requirements	USP Section	Due Date
1	Hire or designate an employee to be the academic and behavioral supports coordinator (ABSC)	V D 2 a	04/01/13
2	Assess existing programs, resources, and practices, disaggregated by school site(s), grades served, number of student(s) served, ELL status, resources assigned, and annual budget.	V D 2 b	07/01/13
3	Develop a plan incorporating research-based strategies to focus and increase resources for academic and behavioral support programs and dropout prevention services to ensure equitable access to such programs, concentrate resources on school site(s) and in areas where student and school data indicate there is the greatest need, and reduce the dropout rate and increase the graduation rate in each high school.	V D 2 b	10/01/13
4	Implement the dropout prevention and retention plan, including having ensured that all personnel who provide academic and behavioral support are assigned to school(s) or area(s).	V D 2 c	07/01/14
5	Develop and/or amend academic and behavioral intervention policies and strategies including changing the data dashboard system to ensure that students who fall below a particular academic threshold; go above a certain threshold of absences; or receive a certain threshold number of disciplinary consequences or referrals, are flagged and referred to the student services resources.	V D 3 a	07/01/13
6	Provide all administrators and certificated staff with training on how to create supportive and inclusive learning environments for African American and Latino students	V D 5 a	10/01/13
7	Coordinate hiring or designating individuals who can assist in providing ongoing support and training to administrators, certificated staff, and paraprofessionals.	V D 5 a	05/01/13
8	Hold quarterly events at each school or clusters of schools serving African American and Latino students, to provide families with information about students' academic progress and college preparation.	V D 5 d	Quarterly



Item	Data Reporting Requirements	USP Section	Due Date
9	Appoint a Task Force who will develop a comprehensive plan for significantly improving the academic performance of African American students	V D 5 g	06/01/13
10	Build and sustain the supportive and inclusive school environments	V E 2	07/01/13
11	Require each school principal to develop strategies to highlight the historic and ongoing contributions of diverse ethnic, racial, and linguistic groups in a manner that is evident throughout each school	V E 3	07/01/13
12	Report all amendments and revisions made to data dashboard systems	V F n	Annual Report
13	Report on all students retained in grade disaggregated by race, and ethnicity.	V F o	Annual Report
14	Describe the college mentoring program including school sites where college mentor have been engaged and type of support they are providing	V F p	Annual Report
15	For all training and professional development in this section, provide type of training, location held, number of personnel who attended by position, presenter(s), training outline or presentation and any documents distributed.	V F t	Annual Report

Based on these data reporting and monitoring requirements, the following data elements specific to Student Engagement and Support must be tracked:

Data Element	Source	Date Available	Comments	Readiness Indicator
Thresholds for academic, attendance, discipline	Mojave	No automation	The USP calls for automated notification based on thresholds, which is not available. Discipline does have the ability to produce 3, 6, and 10 incident reports.	

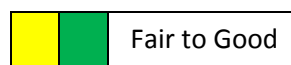


Data Element	Source	Date Available	Comments	Readiness Indicator
Customer Complaints	Web base and phone templates	No reporting available	There is a web based complaint form and a similar phone tracking complaint form but it is not in a format that supports reporting and analysis.	
School Profiles	None	New	A common school profile is being prepared that will provide information across all projects regarding information on programs available in a school.	

	Data readily available. No/little data manipulation needed.
	Data available but manual effort needed to merge data from multiple systems
	No data tracked or agreement on data points has not been finalized.

Mojave, Grant Tracker (a custom written program which is being used to track services provided by Student Engagement and Support), and Accountability and Research data are being used to produce the reports required by the USP. Grant Tracker was designed specifically to track information on personnel working on Grants and has been extended to include personnel working on other programs and services. This may have additional information but does duplicate some data stored in the Mojave student system. For example, Intervention Strategies are set up to be tracked within Grant Tracker but these are also tracked in an unstructured way in the Mojave Discipline system. Grant Tracker is not generally available to all employees within the district and if it were, which system to be used could be an issue. It is recommended that Student Engagement and Support identify the best solution for the district and deploy a single system for tracking and report.

8.3 Overall Readiness Assessment



The Student Engagement and Support project has multiple data sources available to them and sometimes these are duplicated. Tracking of data can and is being done and reports are being



produced justifying the rating of Fair to Good. However, the Project team recognizes that manual intervention is still required to produce many reports and the automation described within the USP is not available to them.

9 P6 – Environments and Culture

Within the USP, TUSD must ensure that school and classroom environments are racially integrated. In addition, TUSD must develop and integrate multicultural curriculum n courses at all grade levels to engage African American and Latino students.

9.1 TUSD Participants

Participants interviewed for the P6 – Environments and Culture project included:

- ✓ Pat Cisneros
- ✓ Dr. Augie Romero

9.2 Data Reporting and Monitoring Requirements

The following data reporting is required in this area and falls under the responsibility of Dr. Romero:

Item	Data Reporting Requirements	USP Section	Due Date
1	Hire or designate an individual who shall supervise the implementation of courses of individual who shall supervise the implementation of courses of instruction that focus on the cultural and historical experiences and perspectives of African American and Latino communities.	V D 4 c	
2	Develop and implement a professional development plan for administrators, certificated staff, and paraprofessionals, as appropriate, on how best to deliver these courses of instruction and to engage African American and Latino students.	V D 4 c	
3	Hire or designate an individual to supervise the development and integration of multicultural curriculum in courses at all grade levels.	V D 4 d	
4	Provide all administrators and certificated staff, particularly those who are teaching courses of instruction centered on the experiences and perspectives of African American and/or Latino communities, with training on how to create supportive and inclusive learning environments for African American and Latino students with an emphasis on curriculum, pedagogy	V D 5 a	2013-14



Item	Data Reporting Requirements	USP Section	Due Date
	and cultural responsiveness.		
5	Develop and implement a multicultural curriculum for District courses which integrates racially and ethnically diverse perspectives and experiences.	V D 6 a i	
6	Develop and implement culturally relevant courses of instruction designed to reflect the history, experiences, and culture of African American and Mexican American communities.	V D 6 a ii	Fall term 2013-14
7	Assignment of students to classrooms or services will not impede the District from meeting its desegregation obligations. Review of referral, evaluation and placement policies and practices, as well as relevant disaggregated enrollment data to identify and remedy any classroom assignment or placement of students.	V E 1	
8	Build and sustain the supportive and inclusive school environments including but not limited to: (i) adopting or amending polices to reflect commitments to inclusion and non-discrimination in all District activities and disseminating those polices throughout the District; (ii) piloting and implementing strategies to develop students' intercultural proficiency; and (iii) amending policies and practices to protect all members of school communities from discriminatory harassment and bullying by amending Governing Board Policy JICFB to: (i) state that all students, regardless of their background, are entitled to an educational environment free from harassment and discrimination; (ii) reaffirm that the District shall appropriately and immediately respond to and stop all conduct that may constitute harassment; (iii) ensure that the District fully investigates reported conduct that may constitute harassment; (iv) respond to complaints of discrimination promptly and appropriately; (v) state that all complaints shall be kept confidential to the extent practicable; (vi) explain how to report allegations of harassment and discrimination; (vii) identify to whom at each school and in the District office such allegations should be reported; (viii) set forth formal complaint procedures; and (ix) inform students and their parents of their rights to file complaints.	V E 2	



Item	Data Reporting Requirements	USP Section	Due Date
9	Require each school principal to develop strategies to highlight the historic and ongoing contributions of diverse ethnic, racial, and linguistic groups in a manner that is evident throughout each school, including public displays, classroom environments, and libraries	VE 3	07/01/13

Based on these data reporting and monitoring requirements, the following data elements specific to Extracurricular Activities must be tracked:

Data Element	Source	Date Available	Comments	Readiness Indicator
Ethnicity	A&R	Now	Must be normalized from Mojave since USP differs from State / Federal standards	
Enrollment	A&R	Now		
Teacher assignments	PeopleSoft, Mojave	Now		

	Data readily available. No/little data manipulation needed.
	Data available but manual effort needed to merge data from multiple systems
	No data tracked or agreement on data points has not been finalized.

The P6 – Environments and Culture Project has identified the data they need and all of it is currently available. Access to the data must be improved so that filtered data, i.e. enrollment in Advanced Learning Experience classes disaggregated by location, grade, ethnicity, etc. is more readily available.

9.3 Overall Readiness Assessment

	Good
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Dr. Romero's immediate focus is on professional development and his team has planned for 4, 6 hour modules which will focus on creating supportive and inclusive learning environments for



African American and Latino students with an emphasis on curriculum, pedagogy and cultural responsiveness. Two modules have been developed and Dr. Romero has held the first session on module one which had 28 teachers in attendance. A second session on module 1 has an additional 12 teachers enrolled.

Minimum certification requirements of 12 instructional hours have been set for any teacher to qualify for teaching grade 11 and 12 courses in Language Arts and Social Studies which have had multicultural content inserted. Until a teacher has met these requirements, a school will not be able to open a section in this area. Dr. Romero has addressed the issue of "Right of Assignment" with principals and has indicated that teachers, once assigned and trained on the multicultural pedagogy will not be able to be reassigned.

Dr. Romero's team has also been focusing efforts on infusing pedagogy and cultural responsiveness into the grade 11 and 12 Language Arts and Social Studies. The changes have been completed and have gone through 3 out of 5 required reviews:

1. Review 1 - Colleges and experts. Completed with changes inserted into the curriculum
2. Review 2 – National review team. Completed with changes implemented.
3. Review 3 – Multi-cultural Community review. Completed with changes inserted.
4. Review 4 – Cabinet review in process.
5. Review 5 – ADE final review in process. Anticipating changes to be provided back to Dr. Romero by June 3rd; changes inserted by June 6th; and final approval by June 11.

Dr. Romero will be monitoring enrollment in these courses through review of demographics at the district, location and program level disaggregated by Location, Grade, Program, Ethnicity.

10 P7 - Discipline

The USP requires TUSD to continue to strengthen the implementation of the following comprehensive, school-wide approaches to classroom management and student behavior:

- "Restorative Practices" – a framework to give those affected by conflict the tools and principles needed to resolve problems and build relationships.
- "Positive Behavior Intervention and Supports" (PBIS) – a set of strategies and structures to assist schools in establishing a positive school culture by constructively teaching school rules and social-emotional skills; positively reinforcing appropriate student behavior; using effective classroom management strategies to provide early intervention for misbehavior; and developing a continuum of graduated and appropriate consequences for more serious and continuous misbehavior.

10.1 TUSD Participants

Participants interviewed for the P7 – Discipline project included:



- ✓ Brian Lambert
- ✓ Charlotte Brown

10.2 Data Reporting and Monitoring Requirements

The following data reporting is required in this area and falls under the responsibility of Charlotte Brown, assisted by Brian Lambert:

Item	Data Reporting Requirements	USP Section	Due Date
1	Evaluate and revise the Guidelines for Student Rights and Responsibilities	VI B 2 a	04/01/13
2	Evaluate and revise due process protections for student discipline (Governing Board Policy JK-R1 through JK-R4-E4 and JKA through JKAB), to ensure that students and parents are provided with a fair, impartial, and language-accessible proceeding	VI B 2 b	07/01/13
3	Hire or designate an employee to serve as the District's restorative and positive practices coordinator (RPPC)	VI C 1	04/01/13
4	All District schools shall hire or designate an employee to serve as a restorative and positive practices site coordinator (RPPSC).	VI C 2	04/01/13
5	District shall hire or designate trainers to assist all administrators and certificated staff to implement Restorative Practices, PBIS and the standards established in the revised GSRR.	VI E 2	7/1/13
6	District shall communicate to teachers and administrators their roles and responsibilities in creating and supporting positive classroom environments and schools	VI E 3 VI E 5	10/1/13
7	District shall identify any changes in the data reporting system necessary to meet all of the reporting and evaluation requirements of this order and the revised GSRR.	VI F 1	04/01/13
8	Track school-site-based disciplinary incidents by school, teacher, date, time, incident type, type of intervention(s) used, and consequences with specific information on any exclusionary actions such as detention, in-school suspensions, out-of-school suspensions, referrals to alternative placement, referrals for expulsion, referrals to law enforcement, number	VI F 1-2, VI G 1 a and Appendix I	Quarterly



Item	Data Reporting Requirements	USP Section	Due Date
	of appeals to the Governing Board or to a Hearing Officer, and outcome of appeals disaggregated by school, teacher, grade level, gender, race, ethnicity, and ELL status available for each year after the 2011-12 school year.		
9	Post all student discipline data on the District website as part of TUSD Stats, subject to the requirements of FERPA	VI F 6	Quarterly
10	Prepare annual report that contains the number of appeals to the Governing Board or to a hearing officer from long term suspensions or expulsions by school, and the outcome of those appeals disaggregated by race, ethnicity and gender.	VI G a	Annual Report
11	Details of each training on behavior or discipline held over the preceding year, including the date(s), length, general description of content, attendees, provider(s) / instructor(s), agenda, and any handouts	VI G g	Annual Report

Based on these data reporting and monitoring requirements, the following data elements specific to Discipline must be tracked:

Data Element	Source	Date Available	Comments	Readiness Indicator
Ethnicity	Mojave	Now	Ethnicity is collected, but must be added to reports necessitating the merging of Mojave data with TUSD Stats resulting in large amounts of manual data manipulation. District-wide reports do not exist and must be created by merging Mojave and TUSD Stats data.	
Reported by	Mojave	Now	There is Inconsistent coding from location to location under the field "Reported by". Some school record this field as an administrator and others the teacher who witnessed the	



Data Element	Source	Date Available	Comments	Readiness Indicator
			event. There needs to be consistency across the District that Reported By is the person who witnessed the event.	
Disposition	Mojave		New codes must be added to record dispositions for appeals and outcomes. The detail codes are not currently part of discipline so these are tracked manually then added to the report.	
Interventions	Mojave		There is an intervention block available in Mojave but this is in free form text; is typically not entered; and is not included in reports. Mojave should have standard intervention strategies that can be selected, similar to Grant Tracker. Reports need to be produced for "Reported By", Location, and District.	
Historical Data	Mojave		All discipline data is cleared at the end of each school year, but backups are created before clearing. Historical discipline information on a student needs to be accessible online to meet USP reporting requirements.	

	Data readily available. No/little data manipulation needed.
	Data available but manual effort needed to merge data from multiple systems
	No data tracked or agreement on data points has not been finalized.



Mojave does store the majority of the information that needs to be tracked with the exception of Dispositions and Interventions. Dispositions should be simple to add since these codes could be added to the current selection list. Interventions may involve more work since now only a free form text block is available. This should be changed to a pre-coded list of intervention strategies that are tracked, similar to what is available in Grant Tracker.

Although Mojave can track most data, reporting of this data is not available in the format required by the USP. District-wide reports are not available, and reports that detail incidents reported by a teacher only be produced unless on an employee by employee basis. To overcome this, Charlotte Brown and Brian Lambert spend approximately 2 weeks to report data by merging discipline data from Mojave with Accountability and Reporting enrollment and ethnicity data.

Training for data entry must also be addressed since there seems to be a variety of opinions as to which data should be entered and how it should be recorded, resulting in inconsistent results between schools. There is also a concern on schools' parts that if all incidents are recorded, it will show either the student and/or the school in a bad light. In addition, there are no consequences, if schools do not record incidents and outcomes. All of these items tend to skew data and analysis, and need to be addressed through additional training.

10.3 Overall Readiness Assessment

	Fair
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Reports are currently being prepared, but with a very high level of manual intervention that supports a "Fair" rating for readiness. The manual effort is required due to the inability to create district-wide reports disaggregated by location, "reported by", ethnicity, grade level, etc. within the Mojave system or the Report Manager function. Current practice can continue but if reports need to be generated monthly, current manpower within the department is inadequate.

Intervention strategies must be added to Mojave since this data is currently not recorded in any reportable way. Some schools use the "Notes" block on a student record but due to the free form nature of the Note, reporting is not possible. It is recommended intervention strategies be identified and added as a pull down field in the Discipline reporting screen to complete the reporting requirements for this area.

11 P7 – Extracurricular Activities

The USP requires that TUSD ensure that extracurricular activities provide opportunities for interracial contact in positive settings of shared interest and that students have equitable access to extracurricular activities regardless of racial or ethnic background or ELL status.



11.1 TUSD Participants

Participants interviewed for the P7 – Extracurricular project included:

- ✓ Brian Lambert
- ✓ Herman House

11.2 Data Reporting and Monitoring Requirements

The following data reporting is required in this area and falls under the responsibility of Herman House:

Item	Data Reporting Requirements	USP Section	Due Date
1	Identify changes necessary to Mojave to enable it to report on participation in extracurricular activities, including sports, social clubs, student publications, co-curricular activities.	VIII B 1	07/01/13
2	Student participation in a sampling of extracurricular activities at each school.	VIII C 1	Annual Report

Based on these data reporting and monitoring requirements, the following data elements specific to Extracurricular Activities must be tracked:

Data Element	Source	Date Available	Comments	Readiness Indicator
Extracurricular Activities Category	Mojave	Not Available	To report this information a list of categories must be created so that reporting can be done across the district. These categories must be added to Mojave. Currently only Sports and Fine Arts are being tracked and only at the high school level.	
Extracurricular Activities extended to all Schools	Mojave	Not Available for Elementary or Middle	Only Sports and Fine Arts are being tracked for high school students. Middle School and Elementary School students tracking needs to be	



Data Element	Source	Date Available	Comments	Readiness Indicator
		Schools	implemented.	
Transportation Eligibility	Mojave	Not Available	Transportation is available only at the request of the school and is not tracked for extracurricular activities, except for Sports and off school premises events.	

	Data readily available. No/little data manipulation needed.
	Data available but manual effort needed to merge data from multiple systems
	No data tracked or agreement on data points has not been finalized.

Mojave does have the ability to track extracurricular activities but it has been specifically designed for sports and eligibility at high school locations. This system must be extended to allow all schools to access the screens and enter data, and a list of extracurricular activities must be added so that reporting can be done across the district.

11.3 Overall Readiness Assessment

At Risk

This project has limited resources to produce the reports that are required by the USP. In addition, Mojave changes must be made to extend the current system beyond the tracking of Sports and Eligibility. A whole new group of schools (middle and elementary) must be trained and this system deployed for them.

There is also a concern about how student participation should be tracked in the elementary and middle schools, as well as for activities other than sports. Since many club advisors are volunteers, the requirement for “attendance” tracking may discourage people from volunteering to be advisors, with the side effect of reducing the availability of activities across all locations.

Finally, transportation eligibility is not being tracked for extracurricular activities. Buses are provided at the request of the schools on an as-needed basis and no charges are incurred for



providing transportation from school to home. Transportation for these activities are not being tracked.

12 P8 – Family Engagement

The goals identified for the Family and Community Engagement implementation identified within the USP include:

- ✓ Developing and implementing an outreach plan to families
- ✓ Providing information to families about the services, programs, and courses of instruction available within TUSD
- ✓ Learning from families how best to meet the needs of their children
- ✓ Collaborating with local colleges and universities and community groups to provide information and guidance designed to improve the education outcomes of African American and Latino students, including ELL students

12.1 TUSD Participants

Participants interviewed for the P8 – Family Engagement project included:

- ✓ Teresa Guerrero
- ✓ Dani Tarry
- ✓ Brian Lambert
- ✓ Shelly Duran
- ✓ Noreen Wiedenfeld

12.2 Data Reporting and Monitoring Requirements

The following data reporting is required in this area and falls under the responsibility of the Family Engagement Coordinator (FEC) Teresa Guerrero:

Item	Data Reporting Requirements	USP Section	Due Date
1	Develop a plan to expand existing Family Center or develop new ones. Include: <ul style="list-style-type: none"> • Identify Family Center Location(s) • Develop materials and distribution strategy for <ul style="list-style-type: none"> ○ Enrollment options including availability of transportation ○ Advanced Learning Experiences ○ Discipline policies and procedures ○ Curricular and student support services offered including information on Academic and behavioral 	VII C 1 a	10/01/13



Item	Data Reporting Requirements	USP Section	Due Date
	<p>Support, dropout prevention services, African American and Latino Student Support Services, culturally relevant courses and policies related to inclusion and non-discrimination</p> <ul style="list-style-type: none"> ○ Educational options for ELL children including availability of dual language programs and other programs designed for ELLs ● Develop strategies for how teachers and principals can learn from families as to how to meet the needs of their children ● Detail how Family Center(s) will be staffed 		
2	<p>Review and assess the District's existing family engagement and support programs, resources, and practices available for African American and Latino students. Include:</p> <ul style="list-style-type: none"> ● Location of programs and resources ● Personnel assigned ● Funding allocated ● Data systems in place to provide outreach information 	VII C 1 b	10/01/13
3	<p>Develop and implement a plan to track data on family engagement and make the necessary changes in Mojave to track by student.</p>	VII C 1 c	01/01/13
4	<p>Develop a plan for reorganization of family engagement resources</p>	VII C 1 d	01/01/14
5	<p>List all persons hired or assigned identified by name, responsibilities, job title, previous job title, others considered for position, and credentials. Include job descriptions.</p>	VII E 1 a	Annual Report
5	<p>Analyze the scope and effectiveness of services provided by the Family Center(s).</p>	VII E 1 d	Annual Report

Based on these data reporting and monitoring requirements, the following data elements specific to Family Engagement must be tracked:



Data Element	Source	Date Available	Comments	Readiness Indicator
Family Center Usage	No existing systems – Manually Tracked	Annual Report	Labor Intensive. Must develop forms for new students to record name, ethnicity, services provided. Should look for new/add on system.	
Discipline Presentations	Could use student attendance system to determine who attended sessions	1 st & 2 nd semester	Consider taking attendance during first period session before all school presentation of Discipline Handbook and use this for attendance tracking.	
Family Center Material Inventory	Could use Destiny Library system to track these	Annual Report	Need to track material, creation date, description, location where available, accessibility on web	
Effectiveness Rating of Services	No baseline data available. No identification of data to track.	Annual Report	Need to identify data points to track for analysis	

	Data readily available. No/little data manipulation needed.
	Data available but manual effort needed to merge data from multiple systems
	No data tracked or agreement on data points has not been finalized.

12.3 Overall Readiness Assessment

At Risk

The Family Center program is new to TUSD and as such has required a great deal of ramp-up effort to achieve its goals. Facilities have been identified to be opened at 1010 East 10th Street and possibly at Duffy but staffing could be an issue. There are no existing automated data systems to support the tracking of Family Center usage and likewise there has not been an agreement on how to determine the “effectiveness of programs / materials” except for possible surveys of Parents/Students.



Many new and/or revised materials have not yet been created but have to be ready for the Family Center opening in October 2013. Work has been done to create a web based outreach resource area but it has yet to be populated with information. Finally, presentations on Advanced Learning Experiences; Discipline Policies and Procedures; and Resources available in the Family Centers have yet to be created.

13 P9 – Facilities Access

The USP requires the P9 – Facilities Access project to establish a methodology to classify facilities within the district across multiple dimensions so that a multi-year plan can be developed for repairs and enhancements.

13.1 TUSD Participants

Participants interviewed for the P9 – Facilities Access project included:

- ✓ Marcus Jones
- ✓ Gina Pesqueira

13.2 Data Reporting and Monitoring Requirements

The following data reporting is required in this area and falls under the responsibility of Gina Pesqueira:

Item	Data Reporting Requirements	USP Section	Due Date
1	Amend the Facilities Conditions Index (FCI) to include at minimum, the following: (i) location, number, and condition of portable classrooms, and (ii) existence and repair status of heating and cooling system (identifying evaporative or air conditioning).	IX A 1	07/01/13
2	Develop an Educational Suitability Score (ESS) for each school that evaluates: (i) the quality of the grounds, including playgrounds and playfields and other outdoor areas, and their usability for school-related activities; (ii) library condition; (iii) capacity and utilization of classrooms and other rooms used for school-related activities; (iv) textbooks and other learning resources; (v) existence and quality of special facilities and laboratories, e.g. art, music, band and shop rooms, gymnasium, auditoriums, theaters, science and language labs; (vi) capacity and use of cafeteria or other eating space(s); and (vii) current fire and safety conditions, and asbestos abatement plans.	IX A 1	07/01/14



Item	Data Reporting Requirements	USP Section	Due Date
3	Assess the conditions of each school site biannually using the amended FCI and the ESS	IX A 2	Biannually
4	Develop a multi-year plan for facilities repairs and improvements with priority on facility conditions that impact the health and safety of a school's students and on schools that score below a 2.0 on the FCI and/or below the District average on the ESS.	IX A 3	Biannually
5	Report on the number and employment status of facility support staff at each school and the formula for assigning such support.	IX C c	Annual Report

Based on these data reporting and monitoring requirements, the following data elements specific to the USP must be tracked:

Data Element	Source	Date Available	Comments	Readiness Indicator
Project and Purchasing information from Lawson	Lawson Financials	Now	Establishes projects	
Ratings	Manual from feedback from personnel	Now	These are entered into the FCI Spreadsheet where an overall index is created for multiple dimensions	

	Data readily available. No/little data manipulation needed.
	Data available but manual effort needed to merge data from multiple systems
	No data tracked or agreement on data points has not been finalized.

The FCI has been in place for several years and all changes required by the USP are now in place. Assessments will begin after closures on existing buildings are completed (approximately in September).



The ESS index is new and planning has begun on its implementation. Since this is a wider assessment of the facilities, it is recommended that Information Technology be involved in the design sessions and that a SQL database be created for this data to provide better availability and easier reporting.

13.3 Overall Readiness Assessment



Marcus and Gina have a very good handle on the FCI and have plans in place for continued assessments and enhancements on the index. Design has begun on the ESS and a Task Force is being convened to get input on the index.

14 P10 – Technology Access

The USP requires the P10 – Technology project to establish a methodology to classify technology indicators within the district across multiple dimensions so that a multi-year plan can be developed, along with a priority list of enhancements.

14.1 TUSD Participants

Participants interviewed for the P10 - Technology project included:

- ✓ John Gay
- ✓ Adele Edwards
- ✓ Bob Karmer
- ✓ Rick Foster
- ✓ Donna Matics

14.2 Data Reporting and Monitoring Requirements

The following data reporting is required in this area and falls under the responsibility of Adele Edwards and Rick Foster:

Item	Data Reporting Requirements	USP Section	Due Date
1	Develop a Technology Conditions Index (“TCI”), which rates technology and technology conditions in schools along multiple technological dimensions and provides a composite score for each school. The TCI shall include, at minimum, the following: (i) student access to computers and other learning devices (e.g., smart boards); the location of computers and learning devices (lab or classroom or both); (ii) availability of wireless and broadband Internet in a school; (iii) availability of	IX B 1	07/01/13



Item	Data Reporting Requirements	USP Section	Due Date
	research-based educational software or courseware; and (iv) teacher proficiency in facilitating student learning with technology.		
3	Assess the technology in each school site biannually	IX B 2	Biannually
4	Develop a multi-year plan for enhancements and improvements to the District's technology, with priority given to basic maintenance and required repairs and to Racially Concentrated Schools that score below the district average on the TCI.	IX B 3	Biannually
5	Include professional development for all classroom personnel to support the use of computers, smart boards and educational software in the classroom setting.	IX B 4	Annual Report

Based on these data reporting and monitoring requirements, the following data elements specific to the USP must be tracked (owned by Adele Edwards and Rick Foster):

Data Element	Source	Date Available	Comments	Readiness Indicator
Number of Computers in schools / classrooms / programs	Mined from a variety of technology tools and validated manually	Not complete	This information has been collected but is not complete / validated.	
Curricular software available by building / program	Data not yet collected	Not Complete	Working on collecting this information and will be able to identify and track some software programs installed in schools using technology tools.	
Teacher skills assessment	Not available	N/A	Need to determine a way to assess and collect this data.	
TCI Index	Not available	N/A	No agreement yet on the makeup of the Technology Index Components	



	Data readily available. No/little data manipulation needed.
	Data available but manual effort needed to merge data from multiple systems
	No data tracked or agreement on data points has not been finalized.

Collection of installed and operational technology data has begun using multiple software detection tools. The collection of available curriculum software has not yet begun.

Finally, there have been many setbacks in the process of establishing the components and rating rubric for the Technology Index.

14.3 Overall Readiness Assessment

	At Risk
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This is a new area and could be very labor intensive. There must be agreement on what is to be analyzed and collected since there is general agreement it must be more than hardware and software counts.

15 P11 – USP Operations and Budget

Similar to P13 – Monitoring and Reporting project, P11 – USP Operations and Budget actually supports and tracks the financial budgets and actual expenses across all other defined USP projects. Last year, budgets were established on a distributed basis, focusing primarily on schools and departments. Restrictions for spending money were not tightly controlled and each entity had little district oversight.

In fiscal year 2013-14, funds will be tightly controlled at a district level. Although budgets will still be established at a school, department/program area, much tighter restrictions will be in place, and approvals will be needed by district departments responsible for the funding.

15.1 TUSD Participants

Participants interviewed for the P11 – USP Operations and Budget project included:

- ✓ Nonie Faras
- ✓ Sam Brown
- ✓ Mohit Goel



15.2 Data Reporting and Monitoring Requirements

The following data reporting is required in this area and falls under the responsibility of Nonie Faras:

Item	Data Reporting Requirements	USP Section	Due Date
1	Propose a methodology and process for allocating funds that are available to it and its schools that accounts for the requirements of the USP	X B 1	2013-14
2	Allocate funds to support the implementation of the USP	X B 2	2012-13
3	Using the Desegregation Funds Expenditure Plan, prepare a budget for the school district that includes a separate section delineating the budget necessary to implement the terms of the USP.	X B 3	2012-13
4	Track and monitor actuals to budget for each area and be engaged in the procurement sign off process	X B 3	Annual
5	Post a copy of the final USP budget on the USP Web Page	X B 6	Annual
6	Provide Plaintiffs and the Special Master with an audit report of each year's USP Budget indicating whether the funds allocated in the USP Budget were spent in accordance with the budget under full disclosure. Audit will be conducted by an outside accounting firm.	X B 7	Annual, by Jan 31

Based on these data reporting and monitoring requirements, the following data elements specific to the USP must be tracked:

Data Element	Source	Date Available	Comments	Readiness Indicator
Budget / Actual Amounts by Project	Set in Lawson with accounts also assigned to personnel in PeopleSoft	Now	Mohit and Sam have worked to create a detailed line item budget for the USP. These have all been set up and recorded in Lawson. Nonie has created an Excel spreadsheet to track these budgets and actuals by project	



Data Element	Source	Date Available	Comments	Readiness Indicator
Personnel activity assigned to USP projects	Grant Tracker		In addition to financial information, P11 – USP Operations and Budget must also track activities reported by USP personnel through Grant Tracker. It has been determined that all USP personnel must record their time in Grant Tracker. Setup and training for personnel must be done. There is concern from other groups that this is NOT the correct system to be using since this tracks Student Contact only.	

	Data readily available. No/little data manipulation needed.
	Data available but manual effort needed to merge data from multiple systems
	No data tracked or agreement on data points has not been finalized.

Nonie is concerned about tracking and monitoring personnel actual expenses. Today, PeopleSoft produces payroll information and sends a General Ledger posting file to Lawson. The General Ledger accounts are cross-walked and many are summarized so that only a total amount is posted in Lawson, not detail at an employee level. Without employee level information, Nonie is concerned that she will not be able to really manage and control expenditures.

Personnel detail charges are available in PeopleSoft and it was recommended that she:

1. Review the monthly charges in all Fund 511 and 514 projects against budgets. For any actuals that are significantly under/over stated, then review personnel charges using PeopleSoft.
2. PeopleSoft has detailed charge reports available (reports AC290 and AC473) and should be checked to ensure that all charges are valid.
3. If not valid, journal entries should be done to correct the miscoding
4. PeopleSoft salary accounts for the person in error should be corrected.



15.3 Overall Readiness Assessment

	Fair
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USP Operations and Budgeting have taken a significant step forward this year to distribute detailed budgets down to a line item basis. In addition, they have put in place an approval process so that district departments are involved in approving expenditures.

There are some manual efforts here to track budgets due to the lack of payroll detail charges available on Lawson. As a result, there will be some additional steps necessary to validate charges.

16 P12 – Professional Development

Professional development requirements are included in each of the projects with 13 specific classes specified within the USP. Besides the creation of classes, Professional Development must use a system to “advertise” all class offerings; provide an online enrollment system to schedule attendees into classes; manage professional development requirements by position; track historical information on attendance and successful completion; and track participant demographics as well as teacher/presenter demographics.

16.1 TUSD Participants

Participants interviewed for the P12 – Professional Development project included:

- ✓ Richard Foster
- ✓ Brian Lambert
- ✓ Pam Wolf
- ✓ Bob Kramer
- ✓ Norreen Wiedenfeld
- ✓ Priscilla McCrenay
- ✓ Dr. Augie Romero

16.2 Data Reporting and Monitoring Requirements

The following data reporting is required in this area and falls under the responsibility of Richard Foster:

Item	Data Reporting Requirements	USP Section	Due Date
1	Track training provided pursuant to the Unitary Status Plan including type of training offered, date of training, length of session, location held, number of personnel who attended by	II K 1 p	Annual Report



Item	Data Reporting Requirements	USP Section	Due Date
	position, presenter(s), training outline or presentation, and distributed documents. Training types will include:		
2	<ul style="list-style-type: none"> Student assignment and/or enrollment process training 	II K 1 p	Annual Report
3	<ul style="list-style-type: none"> Training for school site principals on how to build and foster professional learning communities (PLCs) among teachers 	IV I 4 & IV K 1 q	10/01/13
4	<ul style="list-style-type: none"> Unitary Status Plan elements and requirements training 	IV J 1-2 & IV K 1 q	04/01/13
5	<ul style="list-style-type: none"> Ongoing training for all administrators, certificated staff, and paraprofessionals on culturally responsive pedagogy and instruction 	IV J 3 and IV K 1 q	Ongoing
6	<ul style="list-style-type: none"> Additional targeted professional development provided to administrators and certificated staff identified pursuant to their evaluations as in need of improvement 	IV J 4 and IV K 1 q	Ongoing
7	<ul style="list-style-type: none"> Annual training for all personnel involved in any part of the hiring process on diversity, competitive hiring process, TUSD non-discrimination policies, state and federal non-discrimination law, TUSD recruitment plan, and use of TUSD interview protocols 	IV J 5 and IV K 1 q	Annual
8	<ul style="list-style-type: none"> List or table of new teachers participating in the New Teacher Induction Program (NTIP) and their mentors, disaggregated by race, ethnicity, and school site 	IV K 1 n	As Required
9	<ul style="list-style-type: none"> Aggregate data regarding participation in the Teacher Support Program including race and ethnicity 	IV K 1 o	As Required
10	<ul style="list-style-type: none"> Training on how to create supportive and inclusive learning environments for African American and Latino students with an emphasis on curriculum, pedagogy, and cultural responsiveness 	V D 5 a and V F 1 t	As Required
11	<ul style="list-style-type: none"> Training for African American and Latino student support services staff who are part of academic intervention teams on the use of data systems, analysis, and implementation of specific intervention plans 	V D 7 f	10/01/13



Item	Data Reporting Requirements	USP Section	Due Date
12	<ul style="list-style-type: none"> Provide parent and student informational programs for understanding parents and student roles and responsibilities under Positive Behavior Intervention and Supports” (PBIS), Restorative Practices, and Guidelines for Student Rights and Responsibilities (GSRR) 	VI D 2 (implied)	1 st Semester 2 nd Semester
13	<ul style="list-style-type: none"> Training for Restorative and Positive Practices Site Coordinators (RPPSCs) and all administrators and certificated staff on Restorative Practices, Positive Behavior Intervention and Supports (PBIS), and the revised Guidelines for Student Rights and Responsibilities (GSSR) 	VI E 2 and VI G 1 g	10/01/13 and Ongoing
14	<ul style="list-style-type: none"> Training to support use of computers, smart boards, and educational software in the classroom setting 	IX B 4	Ongoing

Based on these data reporting and monitoring requirements, the following data elements specific to Professional Development must be tracked:

Data Element	Source	Date Available	Comments	Readiness Indicator
Offering Name	truenorthlogic	Now		
Training Type	truenorthlogic	Now		
Date of Training	truenorthlogic	Now		
Length of Session	truenorthlogic	Now		
Location	truenorthlogic	Now		
Personnel attended by Position	truenorthlogic	Now		
Ethnicity of Attendees	PeopleSoft	Manual Merge	Must be manually merged into class attendance since ethnicity is not tracked within True North	



Data Element	Source	Date Available	Comments	Readiness Indicator
			Logic. Could be very labor intensive.	
Presenter / Trainer	truenorthlogic	Manual	Does not track outside consultant information. No demographic information tracked.	

	Data readily available. No/little data manipulation needed.
	Data available but manual effort needed to merge data from multiple systems
	No data tracked or agreement on data points has not been finalized.

truenorthlogic has been installed within at TUSD since 2008 and was originally used to track professional development activities that would impact step movement changes for payroll purposes. This was eliminated from pay step increases and since that time, the system has evolved to be a central location repository for most training offerings available offered within the district.

Recently, TUSD purchased a new Evaluation System from Teachscape. This system also has a professional development tracking tool that may provide similar capabilities to truenorthlogic and could possibly address additional reporting requirements. Richard Foster, manager of the P12 project has the responsibility to review the Teachscape package and determine if it should replace truenorthlogic.

16.3 Overall Readiness Assessment

	Fair
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Professional Development already tracks most required data in an online, web based system available to all TUSD personnel. Employees have had some training on using the system and most have used the system for enrollment purposes. Some issues that have been identified, and which led to an overall readiness assessment of fair include:

- Standards including coding of classes, type of classes, and responsibilities of instructors need to be clearly documented and enforced. Currently, it is estimated about 70% of



instructors and/or certificated employees are actively using the system. This needs to increase to 100% and be extended to classified employees.

- Both truenorthlogic and Teachscape are stand-alone systems. Although they do have the ability to import employee information, data fields are limited. Today, ethnicity, teacher / instructor type (internal/external); instructor demographics; instructor skills / bios are not tracked. As an example, last year Professional Development had responsibility to track approximately 3,500 employees who had to attend EEI training sessions. To report on this, it took Pam Wolf approximately 8 hours to prepare the files through the use of downloads to Excel from PeopleSoft and truenorthlogic; Use of Excel "VLookups" to match required fields; and then filtering of data for no shows, duplicates, and incompletes.
- truenorthlogic does not have an interface that provides data to the Human Resources system, so an integrated view of an employee's employment record including professional development cannot be produced.

17 P13 – Monitoring and Reporting

The P13 – Monitoring and Reporting project actually supports all the other defined projects in the Assessment. This project was meant to be the "keeper of data" and act as a data repository and control point for other projects. As such, the focus within this project is the building of a data repository for documents using SharePoint and eventually helping to manage and deploy a district-wide data warehouse of data for the USP.

The evidence-based accountability system is a system to review program effectiveness and ensure that program changes address racial segregation and improving the academic performance and quality of education for African American and Latino students, including ELLs. The system will be known as the Evidence Based Accountability System (EBAS).

17.1 TUSD Participants

Participants interviewed for the P2 – Transportation project included:

- ✓ Rick Haan
- ✓ John Gay
- ✓ Adele Edwards

17.2 Data Reporting and Monitoring Requirements

The following data reporting is required in this area and falls under the responsibility of Rick Haan:

Item	Data Reporting Requirements	USP Section	Due Date



Item	Data Reporting Requirements	USP Section	Due Date
1	Create a repository of information for storage of required reports, supporting documentation, and information for the USP. SharePoint will be used to manage the data.	N/A	
2	Hire or designate a District Office employee to conduct a review and analysis of the current capacity of Mojave and any other District data collection and tracking system to determine the ability to: (i) track individual student demographic, academic, and behavioral data pursuant to the requirements of the USP; (ii) be compatible with and run reports concurrently with the District's data system(s) for tracking personnel data and information; and (iii) automatically produce alerts, flags, and other programmed signals to indicate when students do not meet pre-determined goals or expectations for academic performance or behavioral concerns.	X A 2	04/01/13
3	Complete review and analysis including an estimated timeline and cost for making necessary adjustments to the District's data systems.	X A 2	07/01/13
4	Hire or contract for appropriate experts to add to or amend the District's data system(s) to allow it to perform the functions within the USP	X A 2	10/01/13
5	Make changes to data systems to allow it to perform functions within the USP	X A 2	01/01/14
6	Require all administrators, certificated staff, and where appropriate, paraprofessionals to undertake the training on the EBAS	X A 3	
7	Evaluate relevant personnel on their ability to utilize the EBAS	X A 4	
8	Description of changes made to Mojave to meet the requirements for EBAS including descriptions of plans to make changes to the system in the subsequent year	X A 5 a ii	Annual Report

Based on these data reporting and monitoring requirements, the following data elements specific to the USP must be tracked:



Data Element	Source	Date Available	Comments	Readiness Indicator
N/A				


	Data readily available. No/little data manipulation needed.
	Data available but manual effort needed to merge data from multiple systems
	No data tracked or agreement on data points has not been finalized.

The intent of this project is to use the outcomes of this Assessment to build a repository of required reports on a SharePoint server that identifies requirements by project. In addition, Rick plans to have a master check off sheet that indicates what the status of the district submission progress is. He will oversee the completion of all reports and information required by USP.

17.3 Overall Readiness Assessment

	Fair
--	------

There is a high level vision for the EBAS system but it is not generally understood across all projects. Although most data is available, there is a large amount of manual intervention that needs to be applied to the data to transform it into a presentable and meaningful manner. This usually entails extracting data from A&R to Excel; extracting data from Mojave and transferring it to Excel; extracting data from PeopleSoft / Lawson and transferring it to Excel; and finally combining and filtering the resulting data to meet reporting requirements. Without a systematic way to approach data summarization and reporting, the amount of manpower and potential for error will grow as reporting requirements become more and more prevalent.

	<p>MOJAVE</p> <p>Intervention</p>	
	Version: 0.01 Date: 6/2012	Page 1 of

Technology Services


Mojave Programming

INTERVENTION

Analysis

MOJAVE
Designed for TUSD by TUSD

Last updated: 8/8/2012
Technologies Services
Analysis

	MOJAVE	
	Intervention	
	Version: 0.01 Date: 6/2012	Page 2 of

Prepared by:	Karen Jones
	Victoria Gibbons
TS CIO Approval:	John Gay (approval to work on the project)

Approvals:

Version	Date	Stakeholder Name	Department/ School	Form of Approval
0.01	6/5/2012	Dr. Clash	High School Leadership/THS	
		Debbie Ferryman	Drop Out Prevention	
		Ann Rivera	High School Leadership	
1.0				

Revision Log:

All revisions to this Analysis will be documented in this log. The initial draft document will be numbered v0.01 and incremented when revisions are made. The document that is approved will be v1.0.

Revision	Date	Description	Name
0.01		Analysis Draft	
1.0		Final Document for approval	



	<p style="text-align: center;">MOJAVE</p> <p style="text-align: center;">Intervention</p>	
	<p>Version: 0.01 Date: 6/2012</p>	<p>Page 3 of</p>

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4.5	Intervention Records	
5.	Reports	
5.1	Student Intervention Summary	
5.2	Student Intervention Report	

Hyperlinks

	MOJAVE Intervention	
	Version: 0.01 Date: 6/2012	Page 4 of

1 Purpose

The purpose is to track student interventions.

2 Background

In the past, Interventions were documented in hard copy.

3 Assumptions and Constraints

3.1 Assumptions

Specifications for Intervention in Mojave will be provided by Dr. Clash.

3.2 Constraints

- Intervention data will only exist from 2013 SY and forward
- **Project will be in two Phases:**
 - Phase I - Academic and Behavioral
 - Phase II - Withdrawal

4 Business Rules

4.1 Security


- Mapped users are limited to students they teach
- Intervention block will be added to the Teacher Role

4.2 Student Screen

Intervention block will display any intervention for the current school year at that school.

Editable information:

- Type – Intervention Type
- Date – Date intervention occurred
 - This will default the current date
 - Must be between the start and end of the school year if no class is chosen.
 - Must be between the start and end of class term based on the school calendar if a class is selected.
- Time – Time intervention occurred
 - This will default to the current time when the screen resolved and based on the user's computer time.
 - Must be a valid time format
- Hours - Hour length of intervention
 - This information is optional
 - Must be a positive integer
- Mins. – Additional Minute length of intervention
 - This information is optional
 - Must be a positive integer

	MOJAVE Intervention	
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- Employee – Person who provided the intervention
 - Choice of employees will come from the employee_location table. Schools need to add people to their School – Teacher area for them to be included in this list.
- Contact – This is a free form field of 128 characters
 - This is not a required data element
- Comment- This is a free form field of 128 characters
 - This is not a required data element
- Class – If this intervention should be associated with a class the user will select a class here
 - Selecting a class will NOT default to the class primary teacher.
 - This information is optional

4.3 Class Screen

Intervention block will only display interventions associated with the class.

Editable information:

- Type – Intervention Type
- Date – Date intervention occurred
 - This will default to the current date
 - Must be between the start and end of class term based on the school calendar.
- Time – Time intervention occurred
 - This will default to the current time when the screen resolved and based on the user's computer time.
 - Must be a valid time format
- Hours - Hour length of intervention
 - This information is optional
 - Must be a positive integer
- Mins. – Additional Minute length of intervention
 - This information is optional
 - Must be a positive integer
- Employee – primary teacher of the class
 - This will default to the primary teacher defined in Mojave at the time the intervention was entered.
 - This information will not be editable
- Contact - Name of person contacted if applicable to the intervention
 - This is a free form field of 128 characters
 - This is not a required data element
- Comment- This is a free form field of 128 characters

	MOJAVE Intervention	
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- This is not a required data element
- Class – This is the class where the intervention was entered
 - This will default to the class on the screen
 - This cannot be changed

4.4 Intervention Type Maintenance

- Mojave will create a block where HS Leadership can add and disable interventions.
- Interventions cannot be deleted.

4.5 Intervention Records

- Intervention records will be stored centrally
- Student mtr_number and location will be stored along with the data elements listed above.

5 **Reports** – Mojave team will start working on reports after 08/15/2012 and they should be complete towards the end of August.

5.1 Student Intervention Summary – This will be a printable report. At this time there will be no criteria or sort orders.

- Employee
- # of Academic Interventions
- # of Behavioral Interventions

5.2 Student Intervention Report - this will be an generator report only . At this time this will be a local report with criteria for date range. (given to GThomas 09/12/12)

- Matric
- Student Name
- Student grade
- Student Federal Ethnicity code
- Class
- Intervention Date
- Intervention Category
- Intervention Type

Third Ethnicity Question

Stakeholders

Sam Brown, Richard Haan, Noreen Wiedenfeld

Purpose

The third ethnicity question is being collected for the purpose of further tracking ethnicity/race data for the Fisher/Mendoza desegregation monitoring.

Assumptions

Per Sam Brown's email 09/25/2012

1. We sent letters to, and will follow up with, approx. 1,200 students who are AfAm and Hispanic.
2. My understanding, please correct me if I'm wrong, is that all TUSD students register each year and that every registration packet includes the race/ethnicity form.
3. We have already identified the approx.. 1,200 mixed AfAm/Hisp students and we are conducting outreach so that they or their families can answer the third question. We started with a letter home that included the new form and a pre-addressed, pre-stamped envelope – they are coming in everyday – with a deadline of Oct 15. After Oct 15, we will be working with the Equity Dep't to make home phone calls to get the information from families who did not respond to the letter. By Oct 30, anyone who did not respond will be coded as multiracial on the third question.

Important to note is that nothing changes for any student, the first two questions give us all the info we need to report to state and federal authorities – the third question just gives my department additional (and more accurate) information for deseg monitoring and reporting purposes only.

Business Rules

If the Hispanic-Latino ethnicity criteria has been selected AND "Black" under the race criteria has been selected we need to allow schools to enter additional information. Mojave will not set any other limitations for editing. Any limitations for changing the 3rd Ethnicity Question will be enforced through district policy. We need to provide a way to identify students who change chosen option #3 (see below) and those who have not responded or been contacted. For this purpose we have added the <Not Contacted> option. Selecting <Not Contacted> not generate a record and will delete the record if it exists.

The following choices will be available

- 1= Primarily Black
- 2= Primarily Hispanic
- 3= Both/Neither/Refused to answer.
- <Not Contacted> -Parent not contacted to get clarification on this question.

If Federal Ethnicity/Race response is changed that the student is no longer Hispanic and Black, the third question is will be removed automatically.

Third Ethnicity Question

TUSD Desegregation department sent out letters in September 2012 to all students enrolled then who met criteria for the third question, they have responses stored in a database. They will provide Mojave Team with an Excel worksheet containing matric and response. In order for the data to be imported into Mojave it must meet the following criteria:

- Must be a valid matric number
- Only one record per student
- Response must equal 1, 2 or 3
- Student must meet the criteria for the third question

The security access to view and edit this data element is based on student demographic security.

Added to document 4/29/2013

Questions from Karen to Rick Haan:

1. Question: Are only new students to the district required to answer the new question?
Response: No, we want to gather it for all Hispanic/Latino=1 and black=1 students. However, we don't have a process to collect this systematically from existing students, that I know of, other than re-registration.
2. Question: If students select "Both/Neither/Refused to Answer" are they no longer a part of the Hispanic/Latino and Black population for deseg purposes?
Response: The agreement reached with the plaintiffs on modifications to the Federal/State race/ethnicity classifications (for desegregation/USP reporting purposes only):
 - a. All students in Multi-Racial with black=1 (and Hispanic/Latino=0, otherwise they would not be in multi-racial) get moved to African-American
 - b. All students with black=1, Hispanic/Latino=1, Q3=1 get moved to African-American. All students with black=1, Hispanic/Latino=1, Q3=3 get moved to Multi-Racial. All students with black=1, Hispanic/Latino=1, Q3=2 stay in Hispanic/Latino.

Added to document 5/15/2013

Deseg:

Hispanic/Latino

- HispanicLatino = 1 and Black < > 1 (any other race can be equal to 1)
- HispanicLatino = 1 and Black = 1 AND StudentRaceEthnicityDeseg.RaceEthnicityDesegId = 2
- HispanicLatino = 1 and Black = 1 AND there is no record in the StudentRaceEthnicityDeseg table

Black

- Black = 1 AND HispanicLatino = 0
- HispanicLatino = 1 and Black = 1 AND StudentRaceEthnicityDeseg.RaceEthnicityDesegId = 1

White

- White = 1 and HispanicLatino = 0 (no other races have been selected)

Asian

- Asian = 1 and HispanicLatino = 0 (no other races have been selected)

American Indian or Alaskan Native

- American Indian or Alaskan Native = 1 and HispanicLatino = 0 (no other races have been selected)

Third Ethnicity Question

Native Hawaiian or other Pacific Islander

- Native Hawaiian or other Pacific Islander = 1 and HispanicLatino = 0 (no other races have been selected)

Multi Racial

- HispanicLatino = 0 and Black = 0 AND SUM(White + NativeAmerican + Asian + PacificIslander) > 1
- HispanicLatino = 1 and Black = 1 AND StudentRaceEthnicityDeseg.RaceEthnicityDesegId = 3

Data

The following tables will be used to track 3rd Ethnicity question data. Accountability and Research will be using these tables for desegregation monitoring. These tables will be available nightly on Matrix.

- StudentRaceEthnicityDeseg
- StudentRaceEthnicityDesegCds

Reporting

Per Sam Brown's email 09/25/2012 (see above under Assumptions), this information will be used by his department only for reporting.


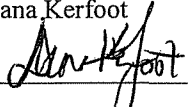
Read Me

Created for the SharePoint site to describe the files placed in the P13 Monitoring and Reporting folder 2012 – 2013.

As part of the process of acquiring the EBAS system, TUSD hired a company to help TUSD gather information on the systems we currently have, and do an RFI to understand what options are available in that system space. The following documents were part of the acquisition of the Vendor.

1. *RFP 13-95-13 USP EBAS Reporting and Monitoring Consulting Services* – The RFQ to get a company write an RFI for the EBAS system and gather information regarding the systems we currently have that would be needed to support the EBASs as well as identify gaps.
2. *Davidson Services Response to Request for Proposal 13-95-13* – Davidson's initial response to the RFQ. As the only vendor, they were selected.
3. *Davidson Services Statement of Work Final* – TUSD met with Davidson and tweaked their initial SOW to meet our needs. There was not a extra charge to the district for the change in the document.

RFQ 13-95-13: USP EBAS Reporting and Monitoring Consulting Services

<p>Quotations Must Be Returned To this Office by:</p> <p><i>2:00 PM (local time) On Friday, March 15, 2013</i></p>	 <p>TUCSON UNIFIED SCHOOL DISTRICT #1 PURCHASING SERVICES Building B, Room 272 1010 E. 10th Street, Tucson, Arizona 85719</p>	<p>RFQ NO: 13-95-13 USP EBAS Reporting and Monitoring Consulting Services</p> <hr/> <p>Issued by: Diana Kerfoot X </p> <hr/> <p>Date: 03/12/13</p> <hr/> <p>Phone: (520) 225-6080 Fax: (520) 225-6082</p>
<p>REQUEST FOR QUOTATION This is NOT a Purchase Order</p>		

The Tucson Unified School District #1 is seeking quotations for the purchase of the services listed herein. Purchase orders may be issued on an as needed basis during the contract period. Prices must be firm for the entire contract period.

INSTRUCTIONS: Please submit your quotations for the following scope of work. Quotations may be submitted via Fax to 520-225-6082, electronically to diana.kerfoot@tusd1.org, or delivered to the address above. Offeror must comply with all terms and conditions of the RFQ and must include the required documentation which allows full and fair evaluation. Failure to comply with these requirements may result in offer rejection. TUSD reserves the right to accept or reject all or part of any quotation submitted. Any resultant agreement, Purchase Orders, or other contracts shall be subject to cancellation pursuant to A.R.S. 38-511, incorporated herein by reference.

The Tucson Unified School District is soliciting quotations for the following goods and/or services:
Unitary Status Plan (USP) Evidence-Based Accountability System (EBAS) Reporting and Monitoring Consulting Services

(See Attached Terms and Conditions and Scope of Work Pages)

Tax Rate (if applicable) _____%	Federal Employer Identification (FEI) Number:
Name of Firm/Individual:	
Address:	Telephone Number:
	Fax Number:
Authorized Person (Type or Print)	
Authorized Signature	

RFQ 13-95-13: USP EBAS Reporting and Monitoring Consulting Services

SPECIAL TERMS AND CONDITIONS

- A. **Overview:** It is the intention of the Tucson Unified School District to procure professional consulting services, with a qualified and experienced vendor, supporting implementation of the District's recently approved Unitary Status Plan (USP). See the detailed scope of services below.
- B. **Evaluation Criteria:** The Tucson Unified School District shall evaluate all offers and award a contract to the apparent low responsive and responsible bidder(s). Price shall not be the sole factor in making bid award, and bidders should not anticipate that the lowest priced item or service will be awarded in all instances. Responsiveness to the solicitation and responsibility to successfully carry out the contract must be evident. Award will be made as determined to be in the best interest of the District, and the District's decision shall be final. Other factors to be considered in making the award include, but are not limited to: reliability of bidder, satisfaction of bidder's previous service, user need and preference, conformity with specifications. Award may be made up to 60 days after due date.
- C. **Price:** Rates must remain firm through the term of the contract.
- D. **Contract Period:** It is the intent of the District to award a contract for Unitary Status Plan (USP) Evidence-Based Accountability System (EBAS) Reporting and Monitoring Consulting Services. The contract resulting from this RFQ will begin immediately upon award and conclude no later than June 30, 2013. Any resultant agreement, Purchase Orders, or other contracts shall be subject to cancellation pursuant to A.R.S. 38-511, incorporated herein by reference.
- E. **Additional Services:** The District reserves the right to add related services to the contract at any time during the contract period. The District shall contact the contractor for prices prior to adding any service, and may at TUSD's sole option, accept the quoted price or purchase those services elsewhere.
- F. **Insurance:** Certificates of Insurance shall be provided by the successful firm or individual providing Commercial Liability Coverage within ten (10) days after the District issues a notice of award. Liability coverage shall include automobile liability and is required in an amount of not less than \$1 million per claim with a general aggregate of at least \$1 million. The Certificate(s) of Insurance shall name the District as an additional insured.

If applicable, Professional Liability Insurance (for errors, omissions and malpractice coverage) shall be provided with limits of at least \$1 million per claim and \$1 million per aggregate to be maintained by the successful offeror(s). If the policy is written on a claim-made basis, offeror warrants that any retroactive date under the policy precedes the effective date of this contract and that continuous coverage will be maintained for a period of two years beginning from the time work under the contract is completed. The cost of the Insured's defense will not be deducted from the amount of insurance available to pay claims. Terms of professional liability insurance may be modified upon a showing that the required terms are not readily available in the commercial market.

A certificate of Workers' Compensation Insurance shall be provided by the successful offeror(s). Workers' Compensation Insurance shall be in compliance with State statute.

Each insurance policy required by the District shall not be cancelled or reduced in coverage or limits except after thirty (30) days written notice to the District.

All certificates are to be received and approved by the District prior to the beginning of the contract period. Failure to maintain the required insurance or provide evidence of insurance shall be considered a material breach of contract.

RFQ 13-95-13: USP EBAS Reporting and Monitoring Consulting Services

- G. Offer and Acceptance:** The RFQ form shall be submitted with the Offer and shall include a signature by a person authorized to sign the Offer. The signature shall signify the Offeror's intent to be bound by the Offer and the terms of the Solicitation and that the information provided is true, accurate, and complete. Failure to submit verifiable evidence of intent to be bound, such as an original signature, may result in rejection of the Offer.
- H. Tax Requirements:** Do not include any Sales or Use Tax on individual items in this Bid. Indicate the percent of tax to be charged by you on the RFQ form. Any bidder from outside the city limits of Tucson indicating tax in excess of the 6.6% State and/or Use Tax must have or must place on file with the Finance Department of the Tucson Unified School District, proof that bidder has secured a City Business Privilege License from the local jurisdiction for which the tax is collected. The District is not exempt from paying Sales and/or Use Tax. Use Tax will be paid on any item on which Sales Tax has not been paid. The District is exempt from paying Federal Excise Tax.
- I. Compensation, Method of Payment and Billing:** Any contract shall provide for compensation that the District determines is fair and reasonable, taking into consideration budgetary limitations, and the scope, complexity and professional nature of the bid items. Vendor will be compensated only for work properly approved in advance by the using school or department. Payment shall be made from detailed invoices, in forms acceptable to the District.

Pricing must be firm for the contract term. Any requested price increase must be based upon a cost increase that directly affects the costs of the maintenance and support provided. Any requested price increase that the District determines is not in its best interest will be rejected, and the District may seek an alternative solution. All price adjustments shall become effective upon acceptance by the District's Purchasing Department.

The successful vendor will be required to bill the District on a monthly basis, with an itemized invoice that indicates the rate of compensation, including school or department, and the applicable District purchase order number. Invoices must be sent to:

Tucson Unified School District
Accounts Payable
P.O. Box 40400
Tucson, Arizona 85717-0400

STANDARD TERMS AND CONDITIONS

- A. Governing Law:** This Contract shall be governed by, and District and Vendor shall have all remedies afforded each by the Uniform Commercial Code, as adopted in the State of Arizona, except as otherwise provided in this contract or in statutes pertaining specifically to the State. The law of the State of Arizona shall govern this Contract. Suits pertaining to this Contract may be brought only in the courts of the State of Arizona. In addition, the Arizona Department of Education School District Procurement Rules (Arizona Administrative Code, R7-2-1001 through R7-2-1195) shall govern this Contract.
- B. Indemnification:** The Vendor agrees to indemnify, defend, and save harmless the District, its Governing Board, administrators, appointed boards, and commissions, officials, employees and insurance carriers, individually and collectively, from all losses, claims, suits, demands, expenses, subrogation, attorney's fee, or actions of any kind and nature resulting from personal injury to any person (including bodily injury and death) or damages to any property, arising or alleged to have arisen out of the Vendor's negligent acts, errors, omissions or performance of the work to be performed under the terms of the contract. The amount and type of insurance coverage requirements set forth will in no way be construed as limiting the scope of indemnity in this paragraph.
- C. Conflict of Interest:** All parties hereby are put on notice that this Contract is subject to termination if any District employee or Governing Board Member has substantial interest in the firm and/or services and has not followed State and District rules governing orders in such interest. Vendor must further certify that they have not paid or agreed to pay any person, other than a bona fide employee a fee or brokerage resulting from the award of this Contract.
- D. Non-Discrimination:** Tucson Unified School District does not discriminate on the basis of race, color, national origin, sex, sexual orientation, age, religion, or disability in admission or access to, or treatment or employment in, its educational programs or activities. Inquires concerning Title VI, Title VII, Title IX, Section 504, and Americans with Disabilities Act may be referred to EEO Compliance Officer, 1010 East 10th Street, Building A, Room #30, Tucson, Arizona 85719, (520) 225-6442, or to the Office for Civil Rights, U.S. Department of Education, 1244 Speer Boulevard, Denver, Colorado 80204. During performance of this Contract the Vendor agrees not to discriminate against any employee or applicant for employment on the basis of race, color, national origin, sex, sexual orientation, age, religion, or disability. Vendor agrees that all individuals eligible to receive services under this Contract will have equal access to those services regardless of race, color, national origin, sex, sexual orientation, age, religion, or disability.
- E. Termination:** This Contract may be terminated by either party to the Contract prior to the expiration date upon thirty (30) days written notice to the other party. Termination of this Contract shall not relieve the Vendor of responsibility for the satisfactory completion of all work in progress at the time of notice.
- F. Assignment:** It is mutually understood that the Vendor shall not assign, transfer, convey, sublet or otherwise dispose of the Contract, or their right, title or interest therein, or power to execute such Contract to any other person, company or corporation without the prior written consent of the District.
- G. Access to Records:** Vendor shall maintain books, records, documents and other evidence and accounting procedures and practices sufficient to reflect properly all costs of whatever nature claimed to have been incurred and anticipated to be incurred in the performance of this Contract. The District and its duly authorized representatives shall have access to the books, documents, papers and records of Vendor which are directly pertinent to this Contract for the purpose of making audit, examination excerpts and transcripts, in accordance with the Arizona State Board of Education School District Procurement Rule R7-2-1083.

RFQ 13-95-13: USP EBAS Reporting and Monitoring Consulting Services

- H. Compliance with Applicable Law:** Vendor agrees to comply with all federal, state, county, and local laws ordinances and regulations applicable to the work to be done under this Contract. Vendor specifically agrees to comply with all applicable requirements of federal and state civil rights and rehabilitation statutes, rules and regulations. Vendor also shall comply with the Americans with Disabilities Act of 1990 (Public Law 101-336) and all regulations and administrative rules established pursuant to those laws.
- I. Severability:** 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.
- J. Availability of Funds:** District certifies that sufficient funds are available and authorized for expenditure to finance costs of this Contract within its current budget appropriation or expenditure limitation, provided. However, continuation of the Contract, or any extension after the end of the fiscal period in which it is written, is contingent upon a new appropriation or limitation for each succeeding fiscal period for the purpose of this Contract.
- K. Nonappropriation of Funds:** If sufficient funds are not provided in future approved budgets of District (or from applicable Federal, State or other sources) to permit District in the exercise of its reasonable administrative discretion to continue this contract, the District may terminate this contract without further liability by giving Vendor not less than thirty (30) days written notice. Vendor shall be compensated for all costs incurred up to the date of the written notice.
- L. Vendor's Employment Eligibility:** By entering the contract, Vendor warrants compliance with ARS subsection 41-4401, ARS subsection 23-214, the Federal Immigration and Nationality Act (FINA), and all other federal immigration laws and regulations. The District may request verification of compliance from any Vendor performing work under this Contract. The District reserves the right to confirm compliance in accordance with applicable laws. Should the District suspect or find that the Vendor is not in compliance, the District may pursue any and all remedies allowed by law, including, but not limited to: suspension of work, termination of the Contract for default, and suspension and/or debarment of the Vendor. All costs necessary to verify compliance are the responsibility of the Vendor.
- M. Business Operations in Sudan:** By entering the contract, Vendor warrants compliance with A.R.S. 35-397, and hereby certifies that the Vendor does not have scrutinized business operations in Sudan.
- N. Business Operations in Iran:** By entering the contract, Vendor warrants compliance with A.R.S. 35-397, and hereby certifies that the Vendor does not have scrutinized business operations in Iran.
- O. Terrorism Country Divestments:** By entering the contract, Vendor warrants compliance with A.R.S. 35-391, and hereby certifies that the Vendor is not in violation of the Export Administration Act and is not on the Excluded Parties List.
- P. Fingerprint and Background Checks:** If required to provide services on school district property at least five (5) times during a month, Vendor shall submit a full set of fingerprints to the school district in accordance with 15-512 of each person or employee who may provide such service. Alternately, the school district may fingerprint those persons or employees. An exception to this requirement may be made as authorized in Governing Board policy. The district shall conduct a fingerprint check in accordance with ARS 41-1750 and Public Law 92-544 of all contractors, subcontractors or vendors and their employees for which fingerprints are submitted to the district. Vendors and their employees shall not provide services on school district properties until authorized by the District.

RFQ 13-95-13: USP EBAS Reporting and Monitoring Consulting Services

TUSD Scope of Services for Unitary Status Plan (USP) Evidence-Based Accountability System (EBAS), Reporting, and Monitoring Consulting Services:

General:

TUSD desires to contract with a qualified and experienced vendor to provide professional consulting services supporting implementation of the District's recently approved "Unitary Status Plan" (USP). Desired consulting services include but are not limited to product research, discovery and facilitation of contacts with other K-12 school districts with similar needs, TUSD requirements determination, and preparation for acquisition of software and services to meet TUSD's requirements under the USP. The District expects the engagement to begin immediately upon contract award and conclude not later than June 30, 2013.

TUSD is currently under Court-ordered Desegregation. Pursuant to that order, the Court appointed an independent party (the "Special Master") to work with TUSD and other parties to the case to develop the Unitary Status Plan. The USP is a document that directs TUSD to plan and implement a specified collection of programs, practices, and systems designed to ensure that TUSD attains and sustains an environment free of the vestiges of ethnic and race-based discrimination.

Among several USP implementation projects is a two-part initiative that focuses heavily on collection and reporting of data (i.e. "evidence") that TUSD is meeting both integration and achievement goals set forth in the USP. More specifically, the two parts are described as follows:

1. TUSD must plan and implement an "Evidence-Based Accountability System" (EBAS) which is an online, district-wide data system providing collection and integration of multi-source data that supports review of the effectiveness of academic and support programs and ensures that program changes and student interventions address racial segregation and improve the academic performance and quality of education for certain ethnic and cultural groups.

The overall intent for EBAS is to provide transparency and accountability for academic achievement and related interventions and support services for students throughout the district. To that end, EBAS must enable the setting of achievement and behavior expectations at an individual student level and provide the ability to track progress of students toward meeting those expectations. EBAS must also provide direct support for the identification of students "at risk" and the tracking of interventions taken to address those students' needs.

2. TUSD must implement Monitoring and Reporting capabilities in support of the many programs and practices specified for implementation within the USP. While these monitoring and reporting capabilities are not, strictly speaking, part of EBAS there is at least a strong connection among them and potentially some overlap in requirements that the District must rationally address as part of the EBAS project.

The USP requires the District **on or before June 20, 2013** to complete all necessary review and analysis of existing systems and to conduct an assessment of the District's needs regarding implementation of EBAS. The assessment must include an estimated timeline and cost for implementing the changes and acquisition(s) necessary to meet EBAS requirements.

The District expects substantial implementation of EBAS during the 2013-2014 school year.

The USP is available as a PDF document at www.tucsonusp.com. Monitoring and Reporting requirements are described throughout the document; the EBAS is described in Section X.A.

RFQ 13-95-13: USP EBAS Reporting and Monitoring Consulting Services

Additional Background:

As a large urban school district, TUSD has a number of existing systems that collect and maintain source data that are relevant to EBAS requirements. The most significant of these are the following:

- **Student Information System:** TUSD maintains a locally developed system, called “Mojave”, that performs most of the functions of a commercial student data management system. Mojave is a browser-based system that has been in place for approximately twenty years and has been well maintained and modernized with respect to its underlying technology. It is robust in terms of administrative needs, particularly state reporting, but lacks some important academic-related capabilities, such as teacher gradebook, classroom management, overall grade reporting, and master schedule development.

TUSD plans to replace Mojave with a commercial system sometime within the next 2-4 years, but does not have a specific project underway to do so at this time. We fully expect to make some modifications to Mojave to accommodate near-term EBAS requirements, then to transition to an environment in which the Mojave replacement is integrated with EBAS.

- **Enterprise Resource Planning:** TUSD current uses an old non-supported version of PeopleSoft for its HR, Payroll, and Benefits functions. The District recently went live on an up-to-date version of the Lawson ERP for its financials and purchasing functions. The move to Lawson (i.e. to replace PeopleSoft Hr, Payroll and Benefits) is on hold pending a major re-evaluation of District needs and an assessment of how to proceed.
- **Assessment System:** In addition to the State summative assessment – currently AIMS, which will be replaced by the Common Core aligned PARCC assessment in the 2014-15 school year – TUSD has deployed the ATI Galileo assessment system virtually district-wide. Galileo is primarily used for benchmark and growth assessments, but is increasingly being used on a more frequent formative basis in some schools. Galileo is externally hosted and is administered mostly on paper, but online in some schools.
- **Learning Management:** TUSD does not have a comprehensive Learning Management System. Over recent years, schools have independently licensed a wide variety of software applications to address instructional and intervention needs. However, the District is moving forward with an initiative to implement district-wide access to Pearson’s Success Maker product. While available next school year at all grade levels and content areas, its initial primary use will be in support of K-3 reading literacy.
- **Statistical Reporting:** TUSD maintains an internally developed reporting system (TUSD Stats) that addresses a wide range of student information – demographics, site and program enrollment, AIMS test results, State-assigned school and district letter grades, etc. The system has a browser interface and produces reports from an integrated database containing extracts from source systems and State provided data. It is not a Data Warehouse in the traditional sense of that term but a reporting system. It is available internally to all TUSD staff. Additionally, permission-filtered data from that database and from a very old and unsupported high-school gradebook is available to parents of TUSD students (the Parent Portal).

Scope of Services:

This engagement is intended to address the Analysis and Planning phase of the District’s overall EBAS initiative. Acquisition and Implementation phases will follow as one or two separately awarded engagements. The intended scope of services for this contract engagement includes the following:

RFQ 13-95-13: USP EBAS Reporting and Monitoring Consulting Services

- Assist TUSD in defining and documenting specific and detailed EBAS requirements. Such requirements include technical and functional needs and will entail examination of the entire USP and extraction of its direct and implied requirements.
- Conduct market/product research to determine availability of commercial products that may meet some or all EBAS requirements.
- Conduct research to discover other similarly sized K-12 school districts that have successfully implemented systems with similar capabilities. Facilitate either telephonic or on-site meetings with representatives from TUSD and one or more of these other districts.
- Assist TUSD in the assessment of existing District data systems in terms of their capabilities to meet and/or support EBAS needs, whether as is or through modifications. The needs assessment shall include examination of available documentation as well as interviews with key stakeholders and focus groups.
- Facilitate a Request for Information (RFI) process in which TUSD invites vendors to describe their products and how they might meet the District's EBAS needs. The RFI process shall include a written invitation to vendors for participation, written responses from vendors, and a summarization process that informs District leadership of the RFIs results.
- Assist TUSD in defining an acquisition and implementation strategy, including approximations regarding budget and staffing requirements. The implementation strategy should include a recommended approach for transitioning from the Mojave system to a new commercial student data system.
- Deliver a final report that documents the engagement and allows TUSD leadership to make an informed decision regarding whether to proceed with a formal RFP and Acquisition phase.

This engagement, including delivery of final report/documentation, must be completed **on or before June 30, 2013**.

Bidder Qualifications:

As TUSD anticipates conducting a formal RFP/acquisition process following this engagement, it is essential that the entity providing consulting services in this engagement be fully independent of any commercial products that might conceivably be included in a subsequent vendor proposal submitted in response to that RFP. Likewise, the consulting entity must be able to substantiate that it has no ongoing partnership or other similar relationship with any third party likely to submit a proposal in response to the District's RFP. Such relationships include subsidiaries and recurring general/subcontractor partnerships. Finally, the consulting entity may not submit its own bid in response to that RFP.

The following specific qualifications/experiences are required of the consulting entity in order for its bid/quote to be considered for this engagement:

- The entity's business practice must either be exclusively within the K-12 education environment or have an established and substantial K-12 education practice.
- The entity must have substantial experience providing related consulting services to urban or suburban districts of similar size and composition to TUSD (50,000 students, 8,000-9,000 employees, 70-100 schools or more).
- The entity must have a minimum of ten years experience providing consulting services around needs analysis, project planning, acquisition/RFP development, and/or implementation of significant software/data systems.

RFQ 13-95-13: USP EBAS Reporting and Monitoring Consulting Services

- The entity's software product experience should include student information systems, ERP systems, Learning Management Systems, Analytics/Decision Support Systems, or other such mission-critical products.
- The entity shall provide a minimum of three relevant references for districts of similar size and composition to TUSD.

Pricing:

Quotes submitted in response to this request should provide sufficient detail regarding proposed hours and duration of work, task descriptions, and pricing for each major proposed task. We recognize that some tasks may not be fully known or understood at the outset; TUSD therefore expects and appreciates a certain degree of flexibility with respect to relatively minor scope changes. We understand, however, the need to address larger changes in some more formal contractual manner. To that end, quotes should include information regarding how more substantial scope or requirements changes are handled, including the pricing approach for such changes.

Section 2.2.1 Mojave Requirements

Item	Description	Projects Requiring Data	Work Effort	Mojave Comments
1	Parent engagement information – Requires the ability to track by student contact with parents and/or guardians across multiple areas. Should have the ability to select parent/guardian (or add additional parent/guardian information); allow definable codes to describe the type of contact; time spent with parents; type of service provided; and free form notes. This area could also be combined with requirement to track complaints and resolution of those complaints.	P2, P3, P4, P5, P8	High	Project Needs to be defined by stakeholders. Who are the stakeholders?
2	Discipline data needs to have Ethnicity normalized to definition of USP.	P7	Medium	Student ethnicity is available. Additional TUSD/USP 3 rd ethnicity question is available.
3	Discipline reports need to be available for District-wide, Location, and “Reported by” reports. Currently this is grayed out on the report writer. Currently taking 2 person weeks to generate reports on a quarterly basis	P7	Low	Reports need to be defined by stakeholders
4	Discipline reports by “REPORTED BY” need to be done. This data is currently only available by printing one “REPORTED BY” at a time.	P7	Medium	Reports need to be defined by stakeholders
5	Discipline has an Intervention Block on the incident record but it is free-form and needs to have more user selectable codes to describe reportable intervention strategies. Grant Tracker has this but it is not the solution.	P7	Medium	The Discipline records are NOT related to the Intervention records. Intervention is NOT just free-form. Intervention types were defined by HS Leadership. Additional functionality would need to be defined by stakeholders.
6	Discipline screen needs more disposition codes to handle appeals and the recording of the disposition on an appeal.	P7	Low	Project Needs to be defined by stakeholders
7	Open Enrollment/Gate/etc. application ID needs to be linked to placement ID.	P2, P5	Medium	Some placement types do not have applications. The association between application and placement can be easily obtained through a query. Additional functionality would need to be defined by stakeholders.
8	There needs to be additional business rules/edits on application date and received date to avoid data anomalies.	P2, P5	Low	Additional functionality or business rules would need to be defined by stakeholders.
9	Need additional status codes on renewal and neighborhood school.	P2	Low	Additional functionality or business rules would need to be defined by stakeholders.
10	There are many “stalled status” records due to multiple enrollment records. If a student is enrolled, all other records should be inactivated.	P2	Medium	Business rules would need to be defined by stakeholders.
11	Itinerant GATE, Middle/High School pullout, and non-self-contained students should be flagged automatically in Mojave with a GATE flag if student took the GATE test.	P4	Medium	These are already flagged by Mojave. (Per Griff)
12	Attendance, Grading, Absences do not have a way to specify a threshold to notify a teacher/administrator/councilor when that threshold is reached	P5	Medium	We are currently working with Rick Haan on pre-specified alerts. USP Dropout Alerts Project

Item	Description	Projects Requiring Data	Work Effort	Mojave Comments
13	A new Grade Book application should be considered since there is no link between "Making the Grade" and Mojave and the current Grade Book is at risk of being unsupported.	P5	Medium	On 7/6/2011 I was told by John Gay we would not be implementing a Grade Book in Mojave. If this has changed, additional functionality would need to be defined by stakeholders.

Section 4.2, Section 6.2 and Section 12.2

Based on these data reporting and monitoring requirements, the following data elements specific to **Student Assignment** must be tracked:

Data Element	Source	Date Available	Comments	Readiness Indicator	Mojave Comments
Extracurricular Activities Category	Mojave	Not Available	To report this information a list of categories must be created so that reporting can be done across the district. These categories must be added to Mojave. Currently only Sports and Fine Arts are being tracked at the high school level.		The system allows tracking of any type of activity. Currently Mojave is working with Herman House on adding functionality to track Middle and Elementary School activities. No categories have been defined at this time.
Extend to all schools	Mojave	Not Available	Only Sports and Fine Arts are being tracked for high school students. Middle School and Elementary School students must have similar access.		Currently Mojave is working with Herman House on adding functionality to track Middle and Elementary School activities. Functionality will be available by the start of school 2014.
Transportation Eligibility	Mojave	Not Available	Transportation is available only at the request of the school and is not tracked for extracurricular activities, except for Sports and off school premises events.		Additional functionality or business rules would need to be defined by stakeholders.

Section 5.2

Based on these data reporting and monitoring requirements, the following data elements specific to **Extracurricular Activities** must be tracked:

Data Element	Source	Date Available	Comments	Readiness Indicator	Mojave Comments
Business rules on Applications	Mojave	Additional edits	Nearly all data is available for Student Assignment. However, quality of data could be improved and additional edits would help.		"Additional Edits" needs to be defined by stakeholder
Student Application ID and Placement ID should be linked	Mojave	Not Available	Today, A&R has developed elaborate scripts to attempt to connect these two data records. They should have an ability to do this automatically.		Mojave team would be happy to help A&R with simple scripts to connect application records with placement records. Please note all placements do not have an associated application record.
Additional Status Codes		Need to be added	Status codes indicating a neighborhood school and/or renewal. This data is not currently tracked directly today.		Additional functionality or business rules would need to be defined by stakeholders.
Clean up routines		Need to be added	If a student is enrolled in a Magnet School for instance, routines should exist to remove		Business rules would need to be defined by stakeholders. Without clear business rules they

Data Element	Source	Date Available	Comments	Readiness Indicator	Mojave Comments
			all other enrollment requests for the student for this year.		will not be happy with the outcome of this request.

Section 7.2 and Section 2.2.1

Data Element	Source	Date Available	Comments	Readiness Indicator	Mojave Comments
Parent Engagement	Not available	N/A	Attempted to use Grant Tracker and did not meet needs. Tried manual and too cumbersome. Would like to consider adding a module in Mojave that had a parent screen with different contact categories which could be easily completed by teachers/others.		This was already defined in Section 2.2.1 Project Needs to be defined by stakeholders. Who are the stakeholders?

Section 8.2 and Section 2.2.1

Data Element	Source	Date Available	Comments	Readiness Indicator	Mojave Comments
Itinerant Gate	Mojave	Not Available	Gate flag is used to track this and not in Student enrollment. Pullout and self-contained can all be flagged automatically. Middle schools, high schools non-self-contained have to be flagged manually and an import would be desirable to do this		This was already defined in Section 2.2.1. These are already flagged in Mojave (Per Griff)

Section 9.2

Data Element	Source	Date Available	Comments	Readiness Indicator	Mojave Comments
Thresholds for academic, attendance, discipline	Mojave	No automation	The USP calls for automated notification which is not available based on thresholds. Discipline does have the ability to produce 3, 6, and 10 incident reports.		We are currently working with Rick Haan on this project. Completion for currently requested requirements is start of school. Additional functionality of "Discipline does not have the ability to produce 3, 6 and 20 incident reports" needs to be defined by stakeholders.

Section 11.2

Based on these data reporting and monitoring requirements, the following data elements specific to Discipline must be tracked:

Data Element	Source	Date Available	Comments	Readiness Indicator	Mojave Comments
Ethnicity	Mojave	Now	Ethnicity must be added to reports and reports must be available to do district-wide reporting. This is not available in Mojave at this time.		Ethnicity data is in Mojave. Stakeholders need to identify which reports ethnicity should be added to or defined any new reports. What the definition of "Ethnicity" also needs to be defined.
Reported by	Mojave	Now	Inconsistent coding from location to location. This needs to be the reported by and now it could be an administrator. District-wide reports cannot be produced by Reported by except on a one by one basis.		Inconsistent coding needs to be addressed by policy. Stakeholders would need to define their reporting requirements.
Disposition	Mojave		New codes must be added to record dispositions for appeals and outcomes. The detail codes are not currently part of discipline so these are tracked manually then added to the report.		Stakeholders need to define additional functionality.
Interventions	Mojave		There is an intervention block available in Mojave but this is free form text; is typically not entered; and not reported on. Need to add standard intervention strategies that can be selected. Reports need to be produced.		The intervention block is NOT free form text except for the comments. There ARE predefined interventions which were defined by HS Leadership. Stakeholders would need to define additional requirements and business rules.
Historical Data	Mojave		All data is cleared year to year but backups before clearing are done. Historical information on a student should be accessible		All data is NOT cleared year to year. ALL historical data is available.

Mojave Alert System

June 4, 2013

Stakeholders

Rick Haan	Debbie Ferryman
Holly Colona	Tsuru Bailey-Jones
James Fish	Jean D'Andrea
Terry Hauser	Katherine Kuhn-Salah

Documentation by

Karen Jones - Mojave

Initial Meeting

- May 1st, 2013

Timeframe

- Per the USP requirements , functionality should be started by July 1, 2013

Definition

- **UPS paragraph** - <http://168.174.252.75/usp/Documents/uspfinal.pdf> (p 36) By July 1, 2013, the District shall develop and/or amend its academic and behavioral intervention policies and strategies to facilitate the supports and interventions described in this section. Such amendment shall include, but not be limited to, changes to the data dashboard system to ensure that students who (i) fall below a particular academic threshold, (ii) go above a certain threshold of absences, or (iii) receive a certain threshold number of disciplinary consequences or referrals, are flagged and referred to the student services resources identified herein. By that date, the District shall make any necessary changes to Mojave to ensure that students are automatically flagged by the data tracking system when they cross these thresholds.
- Provide a system which flags students based on specific criteria. The goal is to notify the appropriate people when a student has been flagged.

Assumptions

- Process will be for the 2013-2014 school year and forward
- All schools will have complete bell schedules input into Mojave

Scope

- Process will only be run for currently active students at a school but it will track their issues from previous schools during the current school year.
- Watchpoints will be year based and will not carry over from one year to the next
- The last day of school will be the final processing for all WatchPoints.

Mojave Alert System

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Processing

Record Processing

Due to the ability for any number of data elements to possibly change the entire record set will be rebuilt for the specified time period and associated to a ProcessId. This will allow us to go back to any week to know what was presented during that week. Processing will be by school. Only the current process for each WatchPoint type will be stored in the WatchPoint table. Historical processing will be stored in the WatchPointHistory table.

WatchPointId	ProcessId	Mtr_number	WatchPointTypeId	OriginDate	ResolutionDate	ResolutionSource
1	1	000000000	1	08/13/2012	09/17/2012	System
80	10	000000000	1	10/15/2012		

Resolution Date

At this time ResolutionSource will only be by System. WatchPointResolution table is for future use when User resolution is permitted. A User resolution is based on mtr_number, WatchPointTypeId and OriginDate. This table can then update current records with WatchPoint table with ResolutionDate and ResolutionSource.

Attendance

The attendance WatchPoint will be based on the previous week's data. Processing will happen every Monday. If the entire previous week was a holiday then we will use the last previous attendance week.

At any given time there should only be 1 record for Attendance that does not have a ResolutionDate.

Flag Criteria

3 unexcused absence in one week

- ✚ Elementary – all period for the day must be marked as unexcused absence
- ✚ Middle and High School
 - 1 – 5 periods, total amount of periods for the day must be marked as unexcused absence
 - 5 periods and above – the one less than the total amount of periods for the day must be flagged as unexcused absence.

Flag Resolution

Students will be flagged with a ResolutionDate when

- ✚ When they have 2 weeks of no unexcused full day absence (based on rules in Flag Criteria)
- ✚ 3 weeks with no more than 1 full day of unexcused absence.

Absence Calculations Business Rules

- Absences will be calculated based on the bell schedule for each day.
- Absences outside of a student's enrollment, schedule or the school bell schedule for a specific day will not be considered.
- Only bell schedule periods flagged as ClassTime = 1 or NoAttendance = 0 will be considered.
- Only absences flagged as absence code U (Unexcused) will be counted.
- Although absence code S (Suspended) is considered unexcused it will not be counted.
- Preschool and Homebound students to not identify absences so they will not be included.

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Grade

High School and Middle School - will be based off of 4 ½ week Quarter and Progress grades. The Process will be run the day after the grading window is closed for Quarter and Progress periods. If a student is enrolled any time during a 4 ½ week period that grading period will be included in the calculation. Semester and Year End grades will not be used in this functionality. At any given time there should only be 1 record for HS/MS Grade that does not have a ResolutionDate.

Elementary School - will be based on 9 week Quarter grades. If a student is enrolled any time during a Quarter that grading period will be included in the calculation. Elementary School data will need to be available by the processing date in order to be considered.

Due to the difference in processing intervals Elementary vs. High School and Middle School will be evaluated separately.

Flag Criteria

- ✚ Elementary – One or more one average rubric score less than 1.5 on the grade report.
 - Accountability and Research Department will need to provided:
 - The name of the table in which grades will be stored
 - **MATRIX.PA.dbo.ElementaryATS**
This will not be the “raw” grades table but a “one average rubric score average for the four core subjects per student per quarter” table
Fields:
 - **mtr_number** - Student’s matric number
 - **ARS_year** – two digit class year
 - **ARS_qtr** - Average Rubric Score quarter (1,2,3,4)
 - **ARS_Reading** - Average Rubric Score for the Reading sections
 - **ARS_Math** - Average Rubric Score for the Math sections
 - **ARS_Science** - Average Rubric Score for the Science sections
 - **ARS_SocialStudies** - Average Rubric Score for the Social Studies sections
 - Definition of how grades should be interpreted:
 - As “average rubric score”
 - Grade data should be made available on the MATRIX server in the PA database
 - Can do, timing may be tricky {see below}, I will have to consult w/ Dave and possibly ultimately w/ Andrew
 - Mojave Team will need to provide:
 - A schedule of when the grade process will be run. This will allow the Accountability and Research Department notice of when the data is required to be available for the process to consider.
- ✚ Middle and High School
 - 2 or more F grades in a 4 ½ week period (based on Quarter and Progress grades only)

Flag Resolution

Middle School and High School grades will be checked every 4 ½ weeks at the end of the grading window. Elementary School grades will be checked every 9 weeks after they have been provided by Accountability and Research. Students will be flagged with a ResolutionDate when:

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- ✚ Elementary School – No longer has any core ARS (average rubric score) of **1.5** for the current grading period.
- ✚ Middle School and High School – no longer has any grade of F for the current grading period
 - NC, I and NULL grades are not considered an F

Disciplinary

The Disciplinary WatchPoint will be based off the Incident data and run on a daily basis. At any given time there should only be 1 Disciplinary record that does not have a ResolutionDate.

Flag Criteria

- ✚ 6 referrals in a Quarter
 - Referrals will be interpreted as incident records of any kind. A student may have multiple violations in an incident, but the incident will only be counted once.
 - Referrals counts will be summed based on incidents within the start and end of each quarter.
 - Referral counts will be based on Offenders only
- ✚ 3 In-school suspensions
 - A student may have multiple In-school suspensions within an incident, but these will be counted only once per incident.
 - In-School suspensions are defined as any incident where the student has an action of:
 - In School Suspension - Long Term With Services
 - In School Suspension - Long Term Without Services
 - In School Suspension - Short Term With Services
 - In School Suspension - Short Term Without Services

[ActionId 52, 53, 54, 38](#)

- ✚ 1 Out of school Suspension
 - A student may have multiple Out-of-school suspensions within an incident, but these will be counted only once per incident.
 - Out-of-School suspensions are defined as any incident where the student has an action of:
 - Out Of School Suspension - Long Term With Services
 - Out Of School Suspension - Long Term Without Services
 - Out Of School Suspension - Short Term With Services
 - Out Of School Suspension - Short Term Without Services

[ActionId 39, 40, 41, 42](#)

Flag Resolution

This will be checked daily. Students will be flagged with a ResolutionDate when

- ✚ Resolution will not be determined until the end of the following quarter
 - 1 or less referrals in the quarter
 - 0 in-school suspensions in the quarter
 - 0 out of school suspensions in the quarter
 -

- ✚ So, a student may get flagged in the first week (OOS), and will not be able to get unflagged until after 2nd quarter

Mojave Alert System

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Mojave Interface (Watchpoint Blocks)

WatchPoint data will be viewable through the School area in the Dropout Prevention Block for currently active students. They will also be viewable through the Student area for a specific student. **Please note:** these will be Mojave blocks and printing is limited to the capabilities of I.E.

Limiting Criteria

View will display data for the specific school you are logged into. Additional criteria will be by:

- All or a specific WatchPoint type
AND
- All WatchPoints or only Unresolved WatchPoints (this will be the default)

Sorting

The blocks will be sortable by all columns.

Data Set

Column	Description
Process Date	The first process date that the WatchPoint was identified. This will be determined by the mtr_number, WatchPointTypeid and OriginDate looking at the WatchPointHistory and the WatchPointProcess tables
Matric #	The student's matriculation number. (Mojave link to student page)
Student	The student's name
WD Type	WatchPoint type: Grades, Elem Grades, Attendance, Discipline
Grade	The student's current grade.
Origin Term	The term the WatchPoint was generated in.
Origin Date	Attendance - the Monday of the week in which the criteria threshold was met. Discipline - the first day of the term in which the criteria threshold was met. Grade - the last day of the term in which the criteria threshold was met.
Origin School	Primary school the student was enrolled in when the threshold was met.
Resolution Date	Attendance – the Monday of the week in which the resolution criteria was met Discipline – the first day of the term in which the resolution criteria was met. Grade – The last day of the term in which the resolution criteria was met.
Resolution School	Primary school the student was enrolled in when the resolution criteria was met.
ELL	ELL category (ELL, ELLAR, RECL)
ExEd	If a student has a currently active census record they will be identified as Exceptional Education.
Deseg Ethnic	Ethnicity based on USP rules. (See Appendix A)

Mojave Alert System

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Reporting

Reports

- Reports have not been defined by stakeholders

Security

For the pilot only seven schools will have access to the WatchPoint functionality. Initially only data for these schools will be processed.

Security for these blocks needs to be set to a higher level.

Mojave Alert System

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APPENDIX A

Hispanic/Latino

- HispanicLatino = 1 and Black \neq 1 (any other race can be equal to 1)
- HispanicLatino = 1 and Black = 1 AND StudentRaceEthnicityDeseg.RaceEthnicityDesegId = 2
- HispanicLatino = 1 and Black = 1 AND there is no record in the StudentRaceEthnicityDeseg table

Black

- Black = 1 AND HispanicLatino = 0
- HispanicLatino = 1 and Black = 1 AND StudentRaceEthnicityDeseg.RaceEthnicityDesegId = 1

White

- White = 1 and HispanicLatino = 0 (no other races have been selected)

Asian

- Asian = 1 and HispanicLatino = 0 (no other races have been selected)

American Indian or Alaskan Native

- American Indian or Alaskan Native = 1 and HispanicLatino = 0 (no other races have been selected)

Native Hawaiian or other Pacific Islander

- Native Hawaiian or other Pacific Islander = 1 and HispanicLatino = 0 (no other races have been selected)

Multi-Racial

- HispanicLatino = 0 and Black = 0 AND SUM(White + NativeAmerican + Asian + PacificIslander) $>$ 1
- HispanicLatino = 1 and Black = 1 AND StudentRaceEthnicityDeseg.RaceEthnicityDesegId = 3

Mojave Alert System

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Questions

No Discipline Records in Mojave

Bonillas	131		0	5/29/2013		
Davis	191		0	5/29/2013		
Direct Link I	122		0	5/29/2013		
Direct Link II	602		0	5/29/2013		
Drachman	203		0	5/29/2013		
Johnson	266		0	5/29/2013		
Lynn/Urquides	287	1	0	5/29/2013		
Sewell	395		0	5/29/2013		

No progress Grade Records in Mojave

- Lawrence
- Robins
- Rose

Mojave Alert System

June 4, 2013

Interscholastic Modification Request

04/26/2013

Several changes have been requested by the Interscholastic Department in order to comply with the USP.

The current Mojave interscholastic module, as requested, was designed specifically for High School activities.

- Business rules are relative to High School activities.
- Data tracking is current year only
- Eligibility rules are for current term only

High School Tracking

- Requirement for historical activity and participant tracking
- Requirement for historical tracking of 4 ½ week eligibility

Elementary/Middle School Tracking

Activities

- **Activity properties defined at the district level**
 - Activity Name
 - Activity Abbreviation
 - Status
 - Season
 - Category
 - Age Restriction – can be left blank
 - Minimum Age
 - Maximum Age
 - Grade Restriction - this will be used for Middle School
 - Minimum Grade Level
 - Maximum Grade Level
 - Gender Restriction
 - Both
 - Male
 - Female
- Activity properties defined at the school level
 - Activity/Team name
 - Activity/Team Home Colors (possible school configuration instead of activity)
 - Activity/Team Away Colors (possible school configuration instead of activity)
 -
- Categories
 - Fine Arts
 - Sports
 - Extracurricular – Sports
 - Extracurricular – Other

Coaches/Directors/Sponsors/Volunteers

- Association of defined Locally
 - Federal Ethnicity/Race needs to be pulled from PeopleSoft for TUSD employees

Interscholastic Modification Request

04/26/2013

- Coach/Volunteer Types
 - Assistant Coach
 - Director
 - Head Coach
 - Sponsor (New)
 - Volunteer
- Volunteers defined centrally
 - Last Name
 - First Name
 - Gender
 - Federal Ethnicity/Race – required
 - Address
 - City
 - State
 - Zip code
 - Certification ID
 - Certification Expired Date
 - CPR Expired Date
 - First Aid Date
 - OSHA Date

Participants/Managers/Trainer

- Eligibility – Flags only, based on Category, no calculation
 - Academic Requirements
 - Fees Paid
 - Physical Complete
 - Birth Certificate
 - Permission Slip
 - Emergency Card
- Type
 - Participant
 - Manager
 - Trainer

Seasons

- Season codes by School level
 - Name
 - Start Date
 - End Date

Interscholastic Modification Request

04/26/2013

Mojave Recommendation

This is an excellent opportunity to design architecture for a semi self-contained interscholastic module which has the components to integrate with future Student Management software choices of TUSD. Short term, the existing High School Interscholastic module can be modified to accommodate new requirements for High School. Elementary and Middle schools can be implemented on the new structures with the potential for integrating High School at a later time.

Timeframe would be based on implementation decisions.