



SOLE SOURCE CERTIFICATE AND POSTING NOTICE

(Greater than \$150,000)

A sole source procurement is when you make a request to purchase product(s) and/or service(s) without competition when competition is otherwise required. This means that product/service is unique and that the supplier is the only supplier that can provide the product or service. In accordance with the authority granted under applicable Florida law and UCF Regulation 7.130, the following documentation is submitted in support of this request.

This form and related documentation shall be submitted through Workday Help using case type Waivers and Sole Source. Please do not attach to a requisition or send via email for review and approval.

WD case subject title should have common structure for easy tracking, to include:

- Exemption type (Sole Source)
- Supplier name
- Purchase amount

The completed sole source must be approved in the following order. **Please be sure to obtain all required signatures before submitting the form to Procurement Services.**

- PI/Researcher/Director/Chair
- President/Vice President/Dean
- Procurement Specialist
- Procurement Services Manager or Associate Director
- Assistant Vice President for Tax, Payables & Procurement, who will review and provide a recommendation to approve or disapprove the sole source to:
- Chief Financial Officer, who will either directly approve or disapprove the sole source, or forward it to the Provost and Executive Vice President for goods/services related to academia for input prior to making the final decision.

Once the completed sole source is received, Procurement Services in collaboration with kNEXT reviews the documentation provided and determines whether the sole source is valid or if there are additional suppliers that may be able to provide the requested product or service. The sole source review and approval process varies based on the nature of the product/service being requested and the information provided in the requestor's justification, among other factors, so please keep this in mind when submitting the form.

Contingent upon the approval of all the officers/individuals listed, the sole source shall be posted on the UCF Procurement Services website for seventy-two (72) hours. Upon expiration of said posting period, Procurement Services will process a purchase order upon receipt of the requisition.

The usual bidding process shall be conducted if sole source approval is not granted.

PART I: DEPARTMENT AND SUPPLIER INFORMATIONDepartment Name: Center for Community SchoolsContact & Phone: Dr. Amy Ellis - 407-823-2723Product/Service Cost: \$348,520☐ One Time Purchase ☒ Term Contract: Jan 2025-May 2026☐ Multiple Purchases ☐ Duration: _____Company Name: American Institutes for Research (AIR)Email: AIRproposals@air.orgContact Person: Joy JijiTitle: Senior Contracts & Grants SpecialistProduct and/or Service: The Learning and Re-envisioning Network (LRN) intensive coaching model**PART II: SOLE SOURCE JUSTIFICATION (see pages 4-5)**

Only justifications submitted on this form and in the below format will be reviewed for approval. All the listed points MUST be fully answered on the following pages and any additional attached pages as needed. Failure to submit justification as outlined in the format below will result in the form being returned without review.

PART III: SOLE SOURCE CERTIFICATIONS

A. In my professional opinion, this is the only product or service that can reasonably meet my requirement(s)/specification(s), and this is the only supplier who can provide the product or service. I further certify that the information contained herein is true and correct to the best of my knowledge and belief and would withstand any audit or supplier protest.

B. I, the undersigned, certify that I and/or the user do not have a financial interest in the above named supplier or contractor, and that I am unaware of any conflict of interest related to this purchase.

Dr. Amy Ellis
Digitally signed by Dr. Amy Ellis
Date: 2025.01.24 15:25:05
+05'00'**Signature**Amy Ellis**Printed Name and Title (PI/Researcher/Director/Chair)****Date**B. Grant Hayes
Digitally signed by B. Grant Hayes
Date: 2025.03.10 06:04:26 -04'00'**Signature**B. Grant Hayes**Printed Name and Title (President/Vice President/Dean)****Date**

(Delegations not allowed; emails from absent approvers are acceptable)

I, the undersigned, hereby concur with the above justification and support a sole source approval for the above product(s) and/or service(s). Approvals may be documented and supported via email.

See below email approval

Signature**Printed Name and Title (Procurement Specialist)****Date**

See below email approval

Signature**Printed Name and Title
(Procurement Services Manager or Associate Director)****Date**

See below email approval

Signature**Printed Name and Title
(Asst. Vice President for Tax, Payables & Procurement)****Date**

See below email approval

Signature

Printed Name and Title (Chief Financial Officer)

Date

POSTING NOTICE

4/9/2025 11:00am EST

4/14/2025 11:00am EST

2509

Trinh Nguyen

Date/Time Posted

Posting End Date

UCF Control No.

Procurement Specialist

SOLE SOURCE JUSTIFICATION

Please answer the questions below and attach additional documentation if needed.

1. Describe the product(s) and/or service(s) and anticipated use thereof in layman's language.

The Learning and Re-envisioning Network (LRN) is a tested technical assistance approach, based in improvement science methodologies and designed to support continuous improvement in the implementation of the community schools strategy. Through dedicated coaches and regular coaching sessions, the LRN process supports program staff in using and applying data in decision making. The yearlong+ strategy is designed to nest seamlessly into the daily work of Community Partnership Schools (CPS) Directors through:

1. Personalized Coaching - Each school will have an assigned coach who will work closely with the school leader (CPS Director) to guide them through planning and improving the school's programs. These coaches will meet monthly to provide advice, help solve problems, and ensure schools use data effectively to improve their services.
2. Tools for Collecting and Using Data - AIR uses standard data collection tools for continuous improvement processes. Additionally, they provide other user-friendly tools to help schools gather important information, including a dashboard that organizes all the data in one place for easy tracking and decision-making.
3. Group Learning Opportunities - Schools will participate in network meetings where school leaders can share ideas, learn from each other, and find solutions to common challenges. These meetings are a space for collaboration and innovation.
4. Customized Support for Each School - AIR works with each school to identify their specific needs and provides step-by-step support to help them address those needs. For example, if students are struggling to access programs, the coach will help find solutions.

2. Describe the required specifications or requirements and why are they essential to the accomplishment of your work.

1. Tailored Coaching Expertise - Coaches will provide one-on-one, data-driven support to CPS Directors to enhance their ability to analyze and apply data in service planning and continuous improvement. This individualized approach ensures alignment with the unique needs of each school and facilitates measurable progress. The tailored support, informed by AIR's extensive experience with CPS and improvement science, ensures the program's effectiveness while minimizing redundancy.
2. Regular Coaching Sessions - Coaching sessions, scheduled monthly, create a structured environment for ongoing reflection, data analysis, and action planning. This regular cadence fosters accountability and sustained focus on quality improvement.
3. Use of Validated Tools - The inclusion of tools such as Program Quality Checklists, conversation captures, and surveys provides standardized methods for data collection and evaluation, ensuring consistency and reliability in assessing program impact. By embedding data-driven decision-making into daily operations, the LRN facilitates ongoing enhancement of CPS strategies, benefiting students, families, and communities.
4. Support for Needs Assessment - The process incorporates robust needs assessments to refine services, align resources, and respond to community needs. By integrating these assessments into the daily workflow of CPS Directors, the initiative moves beyond compliance to meaningful application.
5. Network Component - The LRN promotes collaboration through network meetings where CPS leaders can share challenges, successes, and best practices. This network fosters innovation and strengthens collective expertise across sites.
6. Improvement Science Framework - The LRN relies on Plan-Do-Study-Act (PDSA) cycles to structure data-driven problem-solving. This iterative process allows for timely adjustments and course corrections, optimizing the effectiveness of interventions.

Provide the names of other suppliers, products and/or services that you have investigated and explain why they do not meet the required specifications or requirements. It may be helpful to present your information in a table like the one below.

Required Specifications	Supplier 1	Supplier 2	Supplier 3	Supplier 4
	Y/N	Y/N	Y/N	Y/N
	Y/N	Y/N	Y/N	Y/N
	Y/N	Y/N	Y/N	Y/N
	Y/N	Y/N	Y/N	Y/N

A. National Center for Community Schools: 1. Tailored coaching expertise - does not focus specifically on improvement science or use a tailored coaching; 2. Regular coaching sessions - frequency of coaching sessions inconsistent; 3. Use of validated tools - does not have a predefined, tested set of instruments equivalent; 4. Support for needs assessments - does not emphasize the seamless integration of these processes into daily operations; 5. Network component - focus and structure differs from LRN's systematic monthly and annual meetings; 6. Improvement Science Framework - does not specifically employ improvement science methodologies like PDSA cycles.

B. Learning Policy Institute: 1. Tailored coaching expertise - direct, tailored coaching is not a primary focus; 2. Regular coaching sessions - does not specialize in providing regular, structured coaching nor hands-on implementation support; 3. Use of validated tools - does not have a tested suite of validated instruments for coaching CPS Directors and supporting continuous improvement; 4. Support for needs assessments - does not typically provide direct, operational integration of processes; 5. Network component - does not specialize in managing ongoing, structured network meetings tied to improvement science; 6. Improvement Science Framework - does not focus specifically on improvement science methodologies or PDSA cycles.

C. Institute for Educational Leadership: 1. Tailored coaching expertise - does not focus specifically on one-on-one coaching using improvement science as its framework; 2. Regular coaching sessions - do not include the structured, recurring coaching sessions tied explicitly to improvement science; 3. Use of validated tools - does not offer the same tested, validated instruments specifically designed for integrating data into continuous improvement processes; 4. Support for needs assessments - does not appear to specialize in embedding them into day-to-day operations; 5. Network component - not tied directly to iterative improvement science processes; 6. Improvement Science Framework - does not explicitly focus on improvement science methodologies or PDSA cycles.

D. National Center for Education Evaluation and Regional Assistance: 1. Tailored coaching expertise - does not specialize in providing ongoing, tailored coaching; 2. Regular coaching sessions - Does not typically offer coaching services; 3. Use of validated tools - does not provide operational tools specifically for the day-to-day implementation of community schools or improvement science processes. See attachment (page 8) for more explanation.

3. State in detail why only this and no other product(s)/service(s) will satisfy the department's requirements. Description may include unique features, compatibility, specifications, availability, delivery time frame etc. (For example, please list the features or special conditions that are unique and only available from one supplier. Note: Price is not a valid reason.)

AIR's unique LRN tool was developed specifically for data driven decision making for Community Schools. AIR also works closely with the CCS Data Management vendor Learning Circle and can ensure there are limited interruptions in service delivery. This arrangement qualifies as a sole source supplier because of the uniqueness of the configuration and the absence of available products to produce data driven decision making specific to Community Schools and its systems (Needs Assessment/Progress Monitoring/Asset Maps). This tool also trains practitioners to have data focused conversations to drive outcomes.

1. Proven Expertise and History with CPS - AIR has been the independent evaluator for UCF's CPS initiative since 2020, providing critical insights into the model's effectiveness and implementation. During this time, AIR has developed a nuanced understanding of the CPS model, including the certification process, site-specific dynamics, and areas for improvement. This history uniquely positions AIR to seamlessly integrate their LRN model into existing workflows without requiring additional onboarding time.
2. Specialized Knowledge and Familiarity - AIR is the sole evaluator with extensive experience in Florida's CPS model and has supported similar initiatives in Chicago Public Schools. Through this work, AIR has demonstrated its ability to tailor technical assistance to the unique needs of community schools, ensuring a perfect fit for the LRN approach.
3. Tailored Technical Assistance Using Validated Methodologies - The LRN approach is rooted in improvement science methodologies, including Plan-Do-Study-Act (PDSA) cycles, which AIR has successfully implemented in similar contexts. AIR's coaching framework breaks down complex needs assessment, service planning, and quality improvement processes into manageable, actionable steps for CPS Directors. This level of precision and customization is not available from other providers.
4. Exclusive Tools and Resources - AIR offers proprietary, validated tools and data collection mechanisms, such as the Program Quality Checklist (PQC), standardized surveys, and the LRN dashboard. These tools are designed specifically to support continuous improvement within the CPS model. No other provider has access to these resources, which are integral to the success of the LRN process.
5. Network Integration and Collaboration - AIR's LRN includes structured peer network meetings, fostering innovation and collaboration among CPS Directors while using real-time data to address shared challenges. The combination of individualized coaching and a networked approach ensures both localized and systemic improvements across sites.
6. Continuity and Efficiency - AIR's established relationship with the UCF Center for Community Schools and its prior work with CPS sites eliminates the need for a new provider to spend months learning the intricacies of the model. Engaging another provider would result in delays, inefficiencies, and a potential compromise in the quality of the initiative.
7. Alignment with Deliverables and Timelines - The LRN model aligns directly with the CPS requirement for comprehensive needs assessments, progress monitoring, and data-driven decision-making. AIR has designed its unique coaching structure and deliverables, including monthly coaching sessions and validated data collection tools, to meet these exact needs within the specified time frame.
8. Proven Results in Similar Initiatives - AIR has successfully piloted and scaled the LRN approach in Chicago, receiving positive feedback from community school coordinators about its manageability, empowerment, and effectiveness. This track record demonstrates AIR's capability to deliver high-impact results in Florida's CPS context.

Revised 12/7/23

4. Are there resellers or distributors? If yes, please list names and contact information.

AIR operates as a direct service provider and implements its proprietary models and methodologies exclusively through its internal team of experts. It does not appear that there are any resellers or distributors for LRN model services or products.

5. Will this purchase obligate UCF to this vendor for future purchases such as maintenance, licensing, or continuing need? ____ Yes ☒ No

If yes, please provide details regarding future obligations and/or needs to include number of years and total spending amount of obligations:

NA

6. What efforts have been made to obtain the best pricing available? Please provide an explanation to support the belief that the price is fair and reasonable.

Research into alternative providers revealed no other organization offers the same combination of proprietary tools, tailored coaching approaches, validated methodologies, and familiarity with CPS, making AIR a sole-source provider in this context.

1. The proposed pricing reflects standard market rates for highly specialized consulting and technical assistance services in the education sector. AIR's costs include expertise in improvement science, data analysis, and coaching, which are in high demand and require advanced qualifications.

2. The pricing is justified by AIR's exclusive ability to provide the LRN model, developed and tested in other community school initiatives. The inclusion of validated tools, tailored coaching, and a proven framework ensures the value of the services far exceeds generic consulting offerings.

3. AIR's proposal includes a potential train-the-trainer model for sustainability. This approach reduces long-term dependency on AIR and provides a cost-efficient pathway for UCF to independently scale the LRN process.

4. AIR's track record with CPS and other community school initiatives demonstrates their capacity to deliver high-quality services within budget. Their work has consistently provided value and actionable results, ensuring the investment aligns with UCF's strategic goals.



**Sole Source Justification
Additional Documentation/Attachment
Learning and Re-envisioning Network (LRN)**

1. Describe the product(s) and/or service(s) and anticipated use thereof in layman's language.

Community school sites and Directors need access to professional supports and systems to better leverage data in decision making and access to a supportive community of their professional peers. To ensure that CPS sites have access to these resources, the University of Central Florida Center for Community Schools (CCS) has requested support for redesigning the systems with which Community Partnership School (CPS) sites conduct needs assessments, monitor progress of implementation in the initiative, and use needs assessment data to make data-based decisions in implementation. The Learning and Re-envisioning Network (LRN) is a tested technical assistance approach, based in improvement science methodologies and designed to support continuous improvement in the implementation of the community schools strategy. Through dedicated coaches and regular coaching sessions, the LRN process supports program staff in using and applying data in decision making. The yearlong strategy is designed to nest seamlessly into the daily work of CPS Directors through:

1. Personalized Coaching - Each school will have an assigned coach who will work closely with the school leader (CPS Director) to guide them through planning and improving the school's programs. These coaches will meet monthly to provide advice, help solve problems, and ensure schools use data effectively to improve their services.
2. Tools for Collecting and Using Data - AIR uses standard data collection tools for continuous improvement processes. Additionally, they provide other user-friendly tools to help schools gather important information, including a dashboard that organizes all the data in one place for easy tracking and decision-making.
3. Group Learning Opportunities - Schools will participate in network meetings where school leaders can share ideas, learn from each other, and find solutions to common challenges. These meetings are a space for collaboration and innovation.
4. Customized Support for Each School - AIR works with each school to identify their specific needs and provides step-by-step support to help them address those needs. For example, if students are struggling to access programs, the coach will help find solutions.



2. Describe the required specifications or requirements and why are they essential to the accomplishment of your work.

1. Tailored Coaching Expertise - Coaches will provide one-on-one, data-driven support to CPS Directors to enhance their ability to analyze and apply data in service planning and continuous improvement. This individualized approach ensures alignment with the unique needs of each school and facilitates measurable progress. The tailored support, informed by AIR's extensive experience with CPS and improvement science, ensures the program's effectiveness while minimizing redundancy.
2. Regular Coaching Sessions - Coaching sessions, scheduled monthly, create a structured environment for ongoing reflection, data analysis, and action planning. This regular cadence fosters accountability and sustained focus on quality improvement.
3. Use of Validated Tools - The inclusion of tools such as Program Quality Checklists, conversation captures, and surveys provides standardized methods for data collection and evaluation, ensuring consistency and reliability in assessing program impact. By embedding data-driven decision-making into daily operations, the LRN facilitates ongoing enhancement of CPS strategies, benefiting students, families, and communities.
4. Support for Needs Assessment - The process incorporates robust needs assessments to refine services, align resources, and respond to community needs. By integrating these assessments into the daily workflow of CPS Directors, the initiative moves beyond compliance to meaningful application.
5. Network Component - The LRN promotes collaboration through network meetings where CPS leaders can share challenges, successes, and best practices. This network fosters innovation and strengthens collective expertise across sites.
6. Improvement Science Framework - The LRN relies on Plan-Do-Study-Act (PDSA) cycles to structure data-driven problem-solving. This iterative process allows for timely adjustments and course corrections, optimizing the effectiveness of interventions.

Provide the names of other suppliers, products and/or services that you have investigated and explain why they do not meet the required specifications or requirements. It may be helpful to present your information in a table like the one below.

Required Specifications	National Center for Community Schools	Learning Policy Institute	Institute for Educational Leadership	National Center for Education Evaluation and Regional Assistance
Tailored Coaching Expertise	Offers customized professional development and technical assistance but does not focus specifically on improvement science or use a tailored coaching framework as LRN.	Offers research, policy recommendations, and general support for community schools, but direct, tailored coaching is not a primary focus of their work.	Offers training and technical assistance through its Coalition for Community Schools initiative but does not focus specifically on one-on-one coaching using improvement science as its framework.	Focuses on evaluation and dissemination of evidence-based practices but does not specialize in providing ongoing, tailored coaching to individual school leaders or community school programs.
Regular Coaching Sessions	Provides ongoing technical assistance, but the frequency and structure of coaching varies.	Does not specialize in providing regular, structured coaching. Their focus is more on creating frameworks and policy guidance rather than hands-on implementation support.	Facilitates professional development opportunities and technical assistance, but these do not include the structured, recurring coaching sessions tied explicitly to improvement science methodologies as described in the LRN.	Does not typically offer coaching services. Its role centers on evaluating programs and sharing findings, which may not include regular, operationally focused coaching sessions.
Use of Validated Tools	Provides tools and resources but does not have a predefined, tested set of instruments equivalent to those developed	Develops tools and resources for policymakers and practitioners but does not have a tested suite of validated instruments for coaching CPS	Provides resources and tools for community schools but does not offer the same tested, validated instruments specifically	Develops and applies rigorous evaluation methods but does not provide operational tools specifically for the day-to-day implementation



	by AIR for the LRN process.	Directors and supporting continuous improvement.	designed for integrating data into continuous improvement processes.	of community schools or improvement science processes.
Support for Needs Assessment	Assists with needs assessments and strategic planning but does not emphasize the seamless integration of these processes into daily operations as explicitly as the LRN model.	Offers insights into needs assessments as part of broader policy recommendations but does not typically provide direct, operational integration of these processes.	Advocates for the use of needs assessments in community schools but does not appear to specialize in embedding them into day-to-day operations in the same way as the LRN model.	Conducts evaluations that may include needs assessments but does not typically focus on integrating these into operational processes for continuous improvement at the school level.
Network Component	Offers opportunities for peer-to-peer learning, such as conferences and workshops, but the focus and structure differs from LRN's systematic monthly and annual meetings.	Engages stakeholders through research dissemination and convenings but does not specialize in managing ongoing, structured network meetings tied to improvement science.	Promotes collaboration through its Coalition for Community Schools and events like the Community Schools National Forum. However, these networks are not tied directly to iterative improvement science processes.	Engages stakeholders through dissemination of evaluation findings and technical reports but does not provide ongoing peer network facilitation as part of a continuous improvement framework.
Improvement Science Framework	Focuses on the community school framework broadly but does not specifically employ improvement science methodologies like PDSA cycles.	Promotes evidence-based practices and continuous improvement broadly but does not focus specifically on improvement science methodologies or PDSA cycles in their implementation models.	Supports continuous improvement broadly but does not explicitly focus on improvement science methodologies or PDSA cycles in its standard practices.	Focuses on rigorous evaluation methods rather than implementing improvement science frameworks for operational processes.



3. State in detail why only this and no other product(s)/service(s) will satisfy the department's requirements. Description may include unique features, compatibility, specifications, availability, delivery time frame etc. (For example, please list the features or special conditions that are unique and only available from one supplier. Note: Price is not a valid reason.)

1. Proven Expertise and History with CPS - AIR has been the independent evaluator for UCF's CPS initiative since 2020, providing critical insights into the model's effectiveness and implementation. During this time, AIR has developed a nuanced understanding of the CPS model, including the certification process, site-specific dynamics, and areas for improvement. This history uniquely positions AIR to seamlessly integrate their LRN model into existing workflows without requiring additional onboarding time.

2. Specialized Knowledge and Familiarity - AIR is the sole evaluator with extensive experience in Florida's CPS model and has supported similar initiatives in Chicago Public Schools. Through this work, AIR has demonstrated its ability to tailor technical assistance to the unique needs of community schools, ensuring a perfect fit for the LRN approach.

3. Tailored Technical Assistance Using Validated Methodologies - The LRN approach is rooted in improvement science methodologies, including Plan-Do-Study-Act (PDSA) cycles, which AIR has successfully implemented in similar contexts. AIR's coaching framework breaks down complex needs assessment, service planning, and quality improvement processes into manageable, actionable steps for CPS Directors. This level of precision and customization is not available from other providers.

4. Exclusive Tools and Resources - AIR offers proprietary, validated tools and data collection mechanisms, such as the Program Quality Checklist (PQC), standardized surveys, and the LRN dashboard. These tools are designed specifically to support continuous improvement within the CPS model. No other provider has access to these resources, which are integral to the success of the LRN process.

5. Network Integration and Collaboration - AIR's LRN includes structured peer network meetings, fostering innovation and collaboration among CPS Directors while using real-time data to address shared challenges. The combination of individualized coaching and a networked approach ensures both localized and systemic improvements across sites.

6. Continuity and Efficiency - AIR's established relationship with the UCF Center for Community Schools and its prior work with CPS sites eliminates the need for a new provider to spend months learning the intricacies of the model. Engaging another provider

would result in delays, inefficiencies, and a potential compromise in the quality of the initiative.

7. Alignment with Deliverables and Timelines - The LRN model aligns directly with the CPS requirement for comprehensive needs assessments, progress monitoring, and data-driven decision-making. AIR has designed its unique coaching structure and deliverables, including monthly coaching sessions and validated data collection tools, to meet these exact needs within the specified time frame.

8. Proven Results in Similar Initiatives - AIR has successfully piloted and scaled the LRN approach in Chicago, receiving positive feedback from community school coordinators about its manageability, empowerment, and effectiveness. This track record demonstrates AIR's capability to deliver high-impact results in Florida's CPS context.

4. Are there resellers or distributors? If yes, please list names and contact information.

AIR operates as a direct service provider and implements its proprietary models and methodologies exclusively through its internal team of experts. It does not appear that there are any resellers or distributors for LRN model services or products.

5. Will this purchase obligate UCF to this vendor for future purchases such as maintenance, licensing, or continuing need?

No

6. What efforts have been made to obtain the best pricing available? Please provide an explanation to support the belief that the price is fair and reasonable.

Research into alternative providers revealed no other organization offers the same combination of proprietary tools, tailored coaching approaches, validated methodologies, and familiarity with CPS, making AIR a sole-source provider in this context.

1. The proposed pricing reflects standard market rates for highly specialized consulting and technical assistance services in the education sector. AIR's costs include expertise in

improvement science, data analysis, and coaching, which are in high demand and require advanced qualifications.

2. The pricing is justified by AIR's exclusive ability to provide the LRN model, developed and tested in other community school initiatives. The inclusion of validated tools, tailored coaching, and a proven framework ensures the value of the services far exceeds generic consulting offerings.

3. AIR's proposal includes a potential train-the-trainer model for sustainability. This approach reduces long-term dependency on AIR and provides a cost-efficient pathway for UCF to independently scale the LRN process.

4. AIR's track record with CPS and other community school initiatives demonstrates their capacity to deliver high-quality services within budget. Their work has consistently provided value and actionable results, ensuring the investment aligns with UCF's strategic goals.

From: [Gerald Hector](#)
To: [Joel Levenson](#)
Cc: [Trinh Nguyen](#); [Nellie Nido](#); [Brian Sargent](#)
Subject: Re: American Institute of Research (AIR) - Case# C0114277 Sole Source
Date: Tuesday, April 8, 2025 8:52:57 PM
Attachments: [Outlook-q4zaoh5r.png](#)

Joel:

I am approved of this sole source application.

Regards,

Gerald L. Hector, CPA
Senior Vice President
Administration and Finance
University of Central Florida
4635 Andromeda Loop N
MH384
Orlando, FL 32816
Tel: (407) 823-1063
Email: gerald.hector@ucf.edu



From: Joel Levenson <Joel.Levenson@ucf.edu>
Sent: Tuesday, April 8, 2025 12:46 PM
To: Gerald Hector <Gerald.Hector@ucf.edu>
Cc: Trinh Nguyen <Trinh.Nguyen@ucf.edu>; Nellie Nido <nellie.nido@ucf.edu>; Brian Sargent <Brian.Sargent@ucf.edu>
Subject: RE: American Institute of Research (AIR) - Case# C0114277 Sole Source

Good afternoon,

Putting this request back to the top of your inbox for review. Let me know if you'd like to discuss this further,

From: Joel Levenson
Sent: Tuesday, March 25, 2025 11:53 AM
To: Gerald Hector <Gerald.Hector@ucf.edu>
Cc: Trinh Nguyen <Trinh.Nguyen@ucf.edu>; Nellie Nido <nellie.nido@ucf.edu>; Brian Sargent <Brian.Sargent@ucf.edu>
Subject: RE: American Institute of Research (AIR) - Case# C0114277 Sole Source

Good morning,

Following up on this request. Let me know if you'd like to discuss this further,

From: Joel Levenson <Joel.Levenson@ucf.edu>
Sent: Thursday, March 13, 2025 1:23 PM
To: Gerald Hector <Gerald.Hector@ucf.edu>

Cc: Trinh Nguyen <Trinh.Nguyen@ucf.edu>; Nellie Nido <nellie.nido@ucf.edu>; Brian Sargent <Brian.Sargent@ucf.edu>
Subject: RE: American Institute of Research (AIR) - Case# C0114277 Sole Source

Good afternoon Gerald,

I support this sole source as well. The PI has provided documentation showing that the services needed for the project are uniquely situated to the AIR supplier. This supplier has a history with the department and other public school systems.

Please review and if you approve, reply all and indicate as such. If you have additional questions, let me know.

From: Brian Sargent <Brian.Sargent@ucf.edu>
Sent: Wednesday, March 12, 2025 2:55 PM
To: Joel Levenson <Joel.Levenson@ucf.edu>
Cc: Trinh Nguyen <Trinh.Nguyen@ucf.edu>; Nellie Nido <nellie.nido@ucf.edu>
Subject: FW: American Institute of Research (AIR) - Case# C0114277 Sole Source

Hi Joel,

I also support this sole source to AIR for learning and re-envisioning network (LRN) intensive coaching issued by The Center for Community Schools.

Although sole sources for services can be tricky, I think the end user provided logical rationale and documentation to support their request.

Please approve/disapprove and let me know if you have any questions.

Thanks,
Brian

From: Trinh Nguyen <Trinh.Nguyen@ucf.edu>
Sent: Monday, March 10, 2025 3:34 PM
To: Brian Sargent <Brian.Sargent@ucf.edu>
Subject: FW: American Institute of Research (AIR) - Case# C0114277 Sole Source

Hi Brian,

I have reviewed the attached SS and can support it with the below reasoning. Please review to see if you agree or not.

Vendor: American Institutes for Research (AIR)
Product: The Learning and Re-envisioning Network (LRN) intensive coaching model
Total Amount: \$348,520
Dept: Center for Community Schools

Requirement: The department wants to purchase a learning and re-envisioning network (LRN) intensive coaching model to utilize with the existing evaluation work done by AIR (American Institutes for Research). The requirements are outlined in the table below.

Research Conducted: The PI provided the names of 4 other suppliers below besides AIR that can offer similar

services but concluded that none of them can offer any of the requirements like AIR can. AIR was contracted to do the evaluation work for UCF's Community Partnership Schools (CPS) since 2020 (ITN 1922GCSA), so they have developed a robust and extensive understanding of the CPS model and processes. Therefore, they are the only one well positioned to integrate their LRN coaching model into the existing workflows. Whereas, going with any other suppliers will require considerable time and resources for customization of additional processes and workflows that AIR already established.

Required Specifications	AIR	National Center for Community Schools	Learning Policy Institute	Institute for Educational Leadership	National Center for Education Evaluation and Regional Assistance
Tailored Coaching Expertise	Yes. Offers tailored coaching where each school will have an assigned coach who will work closely with the school leader (CPS Director) to guide them through planning and improving the school's programs. These coaches will meet monthly to provide advice, help solve problems, and ensure schools use data effectively to improve their services.	Offers customized professional development and technical assistance but does not focus specifically on improvement science or use a tailored coaching framework as LRN.	Offers research, policy recommendations, and general support for community schools, but direct, tailored coaching is not a primary focus of their work.	Offers training and technical assistance through its Coalition for Community Schools initiative but does not focus specifically on one-on-one coaching using improvement science as its framework.	Focuses on evaluation and dissemination of evidence-based practices but does not specialize in providing ongoing, tailored coaching to individual school leaders or community school programs.
Regular Coaching Sessions	Yes. Coaching sessions, scheduled monthly, create a structured environment for ongoing reflection, data analysis, and action planning. This regular cadence fosters accountability and sustained focus on quality improvement.	Provides ongoing technical assistance, but the frequency and structure of coaching varies.	Does not specialize in providing regular, structured coaching. Their focus is more on creating frameworks and policy guidance rather than hands-on implementation support.	Facilitates professional development opportunities and technical assistance, but these do not include the structured, recurring coaching sessions tied explicitly to improvement science methodologies as described in the LRN.	Does not typically offer coaching services. Its role centers on evaluating programs and sharing findings, which may not include regular, operationally focused coaching sessions.
Use of Validated Tools	Yes. The inclusion of tools such as Program Quality Checklists, conversation captures, and surveys provides standardized methods for data collection and evaluation, ensuring consistency and reliability in assessing program impact. By embedding data-driven decision-making into daily operations, the LRN facilitates ongoing enhancement of CPS strategies, benefiting students, families, and communities.	Provides tools and resources but does not have a predefined, tested set of instruments equivalent to those developed by AIR for the LRN process.	Develops tools and resources for policymakers and practitioners but does not have a tested suite of validated instruments for coaching CPS Directors and supporting continuous improvement.	Provides resources and tools for community schools but does not offer the same tested, validated instruments specifically designed for integrating data into continuous improvement processes.	Develops and applies rigorous evaluation methods but does not provide operational tools specifically for the day-to-day implementation of community schools or improvement science processes.
Support for Needs Assessment	Yes. The process incorporates robust needs assessments to refine services, align	Assists with needs assessments and strategic planning but does not	Offers insights into needs assessments as part of broader policy	Advocates for the use of needs assessments in community schools	Conducts evaluations that may include needs assessments but

	resources, and respond to community needs. By integrating these assessments into the daily workflow of CPS Directors, the initiative moves beyond compliance to meaningful application.	emphasize the seamless integration of these processes into daily operations as explicitly as the LRN model.	recommendations but does not typically provide direct, operational integration of these processes.	but does not appear to specialize in embedding them into day-to-day operations in the same way as the LRN model.	does not typically focus on integrating these into operational processes for continuous improvement at the school level.
Network Component	Yes. The LRN promotes collaboration through network meetings where CPS leaders can share challenges, successes, and best practices. This network fosters innovation and strengthens collective expertise across sites.	Offers opportunities for peer-to-peer learning, such as conferences and workshops, but the focus and structure differ from LRN's systematic monthly and annual meetings.	Engages stakeholders through research dissemination and convenings but does not specialize in managing ongoing, structured network meetings tied to improvement science.	Promotes collaboration through its Coalition for Community Schools and events like the Community Schools National Forum. However, these networks are not tied directly to iterative improvement science processes.	Engages stakeholders through dissemination of evaluation findings and technical reports but does not provide ongoing peer network facilitation as part of a continuous improvement framework.
Improvement Science Framework	Yes. The LRN relies on Plan-Do-Study-Act (PDSA) cycles to structure data-driven problem-solving. This iterative process allows for timely adjustments and course corrections, optimizing the effectiveness of interventions.	Focuses on the community school framework broadly but does not specifically employ improvement science methodologies like PDSA cycles.	Promotes evidence-based practices and continuous improvement broadly but does not focus specifically on improvement science methodologies or PDSA cycles in their implementation models.	Supports continuous improvement broadly but does not explicitly focus on improvement science methodologies or PDSA cycles in its standard practices.	Focuses on rigorous evaluation methods rather than implementing improvement science frameworks for operational processes.

The price is fair and reasonable: The price is considered fair and reasonable given that AIR is the only one that can satisfy all requirements. In addition, due to their previous work and track record with UCF's CPS and other community school initiatives, they demonstrate their capacity to deliver high-quality services. Their work has consistently provided valuable and actionable results, ensuring the investment aligns with UCF's strategic goals.

GovSpend: In GovSpend I was able to search for American Institutes for Research but not specifically for their Learning and Re-envisioning Network coaching model for comparison.

Thanks,
Trinh

From: Heather McClellan <Heather.McClellan@ucf.edu>
Sent: Monday, March 10, 2025 2:06 PM
To: Trinh Nguyen <Trinh.Nguyen@ucf.edu>
Cc: Amy Ellis <Amy.Ellis@ucf.edu>
Subject: RE: American Institute of Research (AIR)

Hi Trinh,

I hope you had a wonderful weekend.

Thank you for taking the time to review our Sole Source request! Attached you will find the form with the Dean's signature.

Please don't hesitate to let me know if you have any additional questions.

Sincerely,
Heather McClellan

From: Trinh Nguyen <Trinh.Nguyen@ucf.edu>
Sent: Thursday, March 6, 2025 2:05 PM
To: Heather McClellan <Heather.McClellan@ucf.edu>
Subject: RE: American Institute of Research (AIR)

Hi Heather,

Thank you for the additional information below. So as I understand it, none of the suppliers that were researched can offer any of the requirements like AIR can and to go with any other suppliers besides AIR will require considerable time, money, and resources for customization of additional processes/workflow that's already in place. I think I have enough information to support the SS. However, your attached SS form is missing signature from the Dean/head of the department. Can you please get it signed to return to me.

Thanks,
Trinh

From: Heather McClellan <Heather.McClellan@ucf.edu>
Sent: Wednesday, March 5, 2025 4:24 PM
To: Trinh Nguyen <Trinh.Nguyen@ucf.edu>
Subject: RE: American Institute of Research (AIR)

Hi Trinh,

Happy Wednesday!

My apologies for the delayed response. I am working to catch up on my emails from my time out of office.

1. Is the department wanting to purchase a Coaching Model to integrated into the program design and evaluation that AIR created for UCF under contract ITN 1912NCSA?
 - a. It doesn't necessarily *need* to be integrated with their current contract, but the fact that AIR is already contracted to do the evaluation work would allow for a seamless and continuous program design, data, and evaluation process for all. Since AIR has been the independent evaluator for UCF's Community Partnership Schools (CPS) initiative since 2020, they have a developed a nuanced understanding of the CPS model, including the certification process, site-specific dynamics, and areas for improvement. This history uniquely positions AIR to seamlessly integrate their LRN coaching model into existing workflows without requiring additional processes and onboarding time.
2. Is the coaching model independent of the AIR program design and evaluation consulting work?
 - a. Yes. These are two separate projects and are not dependent on one another.

Please don't hesitate to let me know if you have any additional questions.

Thanks so much,
Heather

From: Trinh Nguyen <Trinh.Nguyen@ucf.edu>
Sent: Monday, February 24, 2025 3:13 PM
To: Heather McClellan <Heather.McClellan@ucf.edu>
Subject: FW: American Institute of Research (AIR)

Hi Heather,

Hope all is well. I'm reviewing your AIR Sole Source and I have some questions and need more information for my review. I'm trying to understand how the contract ITN 1912NCSA ties in with this Coaching Model SS.

1. Is the department wanting to purchase a Coaching Model to integrated into the program design and evaluation that AIR created for UCF under contract ITN 1912NCSA?
2. Is the coaching model independent of the AIR program design and evaluation consulting work?

Thanks,

Trinh Nguyen

Procurement Specialist

Knights Experience Team (kNEXT)

University of Central Florida

Trinh.Nguyen@ucf.edu

☎ 407-823-5889

ucf.edu • kNEXT.ucf.edu • [Workday Help](#)

From: Brian Sargent <Brian.Sargent@ucf.edu>

Sent: Thursday, February 13, 2025 2:02 PM

To: Trinh Nguyen <Trinh.Nguyen@ucf.edu>

Subject: RE: American Institute of Research (AIR)

Case# for reference. **C0114277:Sole Source - AIR LRN - \$348,520**

From: Brian Sargent <Brian.Sargent@ucf.edu>

Sent: Thursday, February 13, 2025 2:01 PM

To: Heather McClellan <Heather.McClellan@ucf.edu>

Cc: Trinh Nguyen <Trinh.Nguyen@ucf.edu>

Subject: RE: American Institute of Research (AIR)

Thanks Heather. I will assign this SS to Trinh Nguyen for review. She will reach out with any questions.

Trinh- information in addition to the what's in the sole source is below for reference.

Regards,

Brian

From: Heather McClellan <Heather.McClellan@ucf.edu>

Sent: Wednesday, February 5, 2025 11:58 AM

To: Brian Sargent <Brian.Sargent@ucf.edu>

Subject: RE: American Institute of Research (AIR)

Hi Brian,

The work could be considered proprietary as the LRN model is unique to the AIR organization. AIR's LRN offers proprietary, validated tools and data collection mechanisms, unlike any other product/service we've explored. These tools are designed specifically to support continuous improvement within the community school model.

Additionally, AIR has been the independent evaluator for UCF's Community Partnership Schools (CPS) initiative since 2020, providing critical insights into the model's effectiveness and implementation. They have developed a nuanced understanding of the CPS model, including the certification process, site-specific dynamics, and areas for improvement. This history uniquely positions AIR to seamlessly integrate their LRN model into existing workflows without requiring additional onboarding time.

Hope that helps!

Thanks so much,
Heather

From: Brian Sargent <Brian.Sargent@ucf.edu>
Sent: Tuesday, February 4, 2025 3:59 PM
To: Heather McClellan <Heather.McClellan@ucf.edu>
Subject: RE: American Institute of Research (AIR)

Nellie is correct, the previous contract expired with no further renewal options. I'm trying to determine if this work could be considered proprietary to AIR due the previous work they already did. Is that the case here?

From: Heather McClellan <Heather.McClellan@ucf.edu>
Sent: Tuesday, February 4, 2025 3:29 PM
To: Brian Sargent <Brian.Sargent@ucf.edu>
Subject: RE: American Institute of Research (AIR)

Hi Brian,

A happy Tuesday to you!

The Learning and Re-envisioning Network (LRN) is not an extension of UCF ITN 1912NCSA - Evaluation of UCF Center for Community Schools. Per Nellie, 1912NCSA is expired and not able to be amended. However, if we can piggyback 1912NCSA to include the LRN contract, we would certainly support that.

Please don't hesitate to let me know if you have any further questions regarding this request.

Thanks so much,
Heather

From: Brian Sargent <Brian.Sargent@ucf.edu>
Sent: Tuesday, February 4, 2025 10:35 AM
To: Heather McClellan <Heather.McClellan@ucf.edu>
Subject: American Institute of Research (AIR)

Good morning Heather,

Regarding the sole source request you submitted for the American Institute of Research. AIR was an awardee of UCF ITN 1912NCSA - Evaluation of UCF Center for Community Schools.

Is this new proposal an extension of the work that AIR completed previously under the ITN award?

Thanks,
Brian

Pilot of the Learning and Re-envisioning Network in Community Partnership Schools

TECHNICAL AND BUDGET PROPOSAL

November 1, 2024

Submitted to:

Alexius Ferguson, EdD
Assistant Director
UCF Center for Community Schools
Orlando Tech Center (OTC), Rm. 402
12443 Research Parkway
Orlando, FL 32816
Email: Alexius.Ferguson@ucf.edu

Submitted by:

American Institutes for Research®

Technical Contact:

Dominique Bradley, PhD
10 S. Riverside Dr.
Chicago, IL 60606
Phone: (541) 840-7948
Email: dbradley@air.org

Contractual Contact:

Joy Jiji
1400 Crystal Drive, 10th Floor
Arlington, VA 22202-3289
Phone: (202) 403-6908
Email: jiji@air.org

Dun and Bradstreet Number: 04-173-3197
Unique Entity ID: MCN6J5L6M3T4
Tax Identification Number (TIN): 25-0965219

This proposal includes proprietary and business confidential data and shall not be disclosed outside the client and shall not be duplicated, used, or disclosed—in whole or in part—for any purpose other than to evaluate this proposal. However, if an agreement is awarded to this offeror as a result of—or in connection with—the submission of these data, the client shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting agreement. This restriction does not limit the client's right to use the information contained in these data if they are obtained from another source without restriction. Notice of Trademark: "American Institutes for Research" and "AIR" are registered trademarks. All other brand, product, or company names are trademarks or registered trademarks of their respective owners. Copyright © 2024 American Institutes for Research®. All rights reserved.



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Advancing Evidence.
Improving Lives.

November 1, 2024

Alexius Ferguson, MEd
Assistant Director
University of Central Florida Center for Community Schools
Orlando, FL 32816
Email: Alexius.Ferguson@ucf.edu

Headquarters
1400 Crystal Drive, 10th Floor
Arlington, VA 22202-3289
+1.202.403.5000
AIR.ORG

RE: LRN Pilot in Community Partnership Schools

Dear Mr. Ferguson:

Community Partnership Schools™ (CPS) support whole-child development and positive family and community outcomes through cross-sector partnership, alignment of supports and opportunities, and authentic student, family, and community engagement. We know that to do this work with quality, CPS sites and Directors need access to professional supports and systems to better leverage data in decision making and access to a supportive community of their professional peers.

To ensure that CPS sites have access to these resources, the University of Central Florida Center for Community Schools has requested support for redesigning the systems with which CPS sites conduct needs assessments, monitor progress of implementation in the initiative, and use needs assessment data to make data-based decisions in implementation.

The American Institutes for Research® (AIR®) has prepared a proposal to enhance the implementation of the CPS strategy with an intensive coaching model. The Learning and Re-envisioning Network (LRN) is a tested technical assistance approach, based in improvement science methodologies and designed to support continuous improvement in the implementation of the community schools strategy. Through dedicated coaches and regular coaching sessions, the LRN process supports program staff in using and applying data in decision making. The yearlong strategy is designed to nest seamlessly into the daily work of CPS Directors. In addition to providing monthly coaching support, the LRN approach includes a network component in which CPS leaders share resources and effective practices. Our team will work with CPS leadership and key partners to tailor this tested model to each school's specific context and needs. Our approach to strengthening implementation of community school initiatives ensures that CPS sites will contribute positively to the lives of young people and their families throughout the state of Florida.

We have enclosed one original copy of the proposal, as requested. Please direct contractual questions about this proposal to Joy Jiji, Senior Contracts & Grants Specialist at 202-403-6908 or AIRproposals@air.org. For technical questions, please contact Dr. Dominique Bradley at 541-840-7948 or dbradley@air.org.

UCF Center for Community Schools

November 1, 2024

Page 2

Thank you for your consideration.

Sincerely,

A handwritten signature in black ink, appearing to read 'Deborah Moroney', with a large, stylized loop at the end.

Deborah Moroney, PhD
Vice President
Human Services Division

Introduction

In 2020 the American Institutes for Research® (AIR®) began providing evaluation support to the Community Partnership Schools™ (CPS) Initiative through a contract with the University of Central Florida's Center for Community Schools (UCF Center). Under the auspices of this contract (2020-2023), the evaluation team from AIR managed a collaborative process to define a series of key performance indicators for the CPS initiative and conducted an implementation and effectiveness evaluation with the goals of understanding (a) key drivers and challenges associated with implementing the CPS model and (b) how CPS sites performed on a series of school-related outcomes prior to the onset of the COVID-19 pandemic. In 2023, AIR conducted additional evaluation activities at the request of the UCF Center to expand on findings from our initial evaluation. This continued evaluation focused on (a) the formulation and adoption of policies and procedures to enhance data sharing among partners involved in CPS implementation and (b) the provision of resources and guidance to further clarify the ideal role of partners in the CPS model and ensure access to equitable technical assistance and related supports and resources.

The UCF Center has invested significant effort into addressing areas of growth identified in each of the initiative evaluations, including improving partner understanding of shared leadership and improved access to shared data through the Learning Circle platform, and has begun to identify challenges with the current process of certification and conducting of needs assessments.

In light of these challenges, the UCF Center has identified the need to adopt revised continuous improvement and needs sensing processes that provide data on a timelier basis and help schools make better use of those data to support decision making. In order to develop and implement these revised processes, schools will need support to

- conduct robust and timely needs assessments that build upon the 5-year needs assessments required through certification,
- implement consistent systems for monitoring progress in the initiative growth, and
- implement processes for monitoring quality of service provision with consistency.

In this proposal, we outline how AIR will support implementation of the Learning and Re-envisioning Network (LRN) approach in current and future CPS sites. The LRN approach consists of a technical assistance model, grounded in improvement science methodologies, to coach CPS Directors in understanding and collecting data and in applying findings to data-driven decision making. The implementation of LRN also includes provision of specialized progress monitoring reports and standardized data collection tools to sites participating in the LRN process. In this proposal we provide background information on the LRN approach, outline the coaching series content and cadence, describe how CPS data will be collected and analyzed, and provide descriptions of how the LRN project will be managed collaboratively with CPS leadership and how site progress will be captured and reported to the UCF Center.

Learning and Re-envisioning Network

LRN Background

The Learning and Re-envisioning Network (LRN) was originally developed to enhance the ability of schools to implement the community school strategy—in particular, the processes of **needs assessment, service planning, and continuous improvement**, which are critical to implementation of the community school strategy and have been identified as key elements of successful community schools in Chicago for more than a decade (Zander et al., 2010). Through evaluation work with Chicago Public Schools (CPS) community schools initiative and other community school initiatives, AIR explored how well these key processes were functioning in community schools. Using interview and focus group data from community school coordinators across initiatives, we found that coordinators frequently lacked the training and support to meaningfully complete and engage with tasks connected to data collection and interpretation and data-driven decision making. Further, we found that often the relationship between CSI coordinators and school administrators had powerful implications for a coordinator’s ability to access needed data, access support, and implement the initiative overall. In response to these challenges, the LRN coaching intervention was developed to provide coaching support, tools, and resources to achieve the following goals:

- Improve the knowledge of coordinators in interpreting data.
- Standardize the processes and data collection tools to support continuous improvement.
- Improve the quality, relevance, and responsiveness of community school activities for students and families.
- Support the development of relationships between the coordinator, students, families, and school staff through meaningful data collection activities.
- Enhance the relationship between the coordinator and principal through LRN-related discussions and activities.

As partners in the development of the LRN program, Chicago Public Schools CSI schools participated in the piloting and development of LRN. The LRN program has been implemented in three cohorts of Chicago Public Schools CSI schools during the past 3 years with very positive response. In systematic feedback, CSI coordinators shared that participating in LRN made their jobs more manageable and made them feel more empowered and successful (Exhibit 1). Further, documentation has shown LRN meetings to be useful in engaging school staff, including principals and school leadership teams,

Exhibit 1. Cohort 1 Resource Coordinator Feedback



“LRN is better because it's every month, so we're thinking about quality improvement each month rather than just at the end of the year.”



“It makes me feel proud of myself to see how the program has grown.”



“These conversations [coaching conversations] have been helpful and functioned like a check-in and see what else I can do in my school.”



“I felt it was manageable. I liked the Action Items monthly because it broke the work into bite sized pieces.”

in critical discussions about what students and families want and need from their community school.

LRN in Community Partnership Schools

UCF Center leadership has expressed a desire to improve the key systems to support needs assessment, service planning, and continuous improvement. Currently, the CPS initiative structures to support these efforts exist within a 5-year certification process. In AIR's previous evaluation work with the CPS sites, we found that (a) the current certification process requires significant data collection efforts in a relatively short time; (b) there is a lack of clarity about what data points are required in the needs assessment and which school partner should be responsible for conducting the needs assessment; and (c) these activities were heavily oriented toward compliance rather than integration into the daily efforts of CPS Directors to support implementation and continuous improvement. UCF Center leadership believes that implementation of the LRN approach will provide the necessary supports for Directors to use and apply data as well as a system in which to streamline their annual assessment and continuous improvement efforts. Data collected and processed as part of participation in the LRN coaching project will supplement and, in some cases, replace the systems currently existing in the certification process. In the following section we provide greater detail about the key processes of LRN including data collection tools and activities and coaching structure.

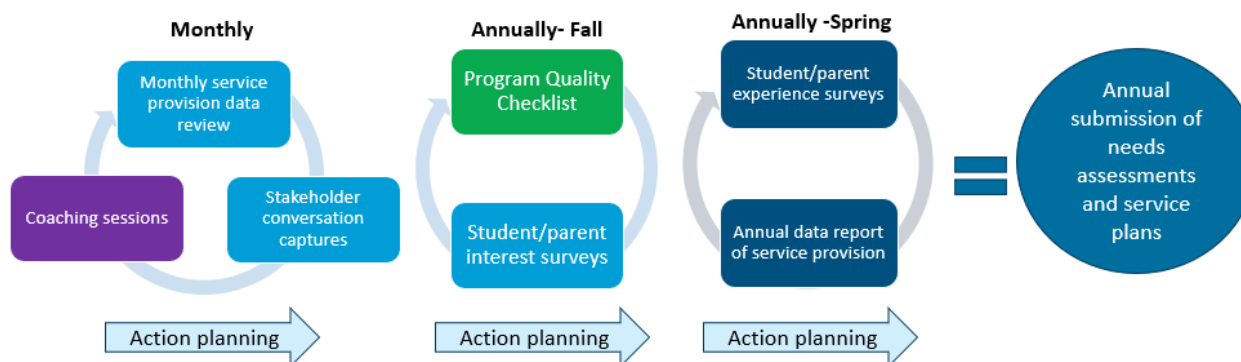
LRN Coaching Intervention Overview

As briefly described in the preceding section, the LRN coaching intervention is a re-envisioned approach to completing the needs assessment, service planning, and continuous improvement processes. The LRN coaching model is based on improvement science methods and principles in which identifying a very specific **problem of practice** as well as identifying early the correct **“user” of a strategy** are foundational (Bryk et al., 2015). As a result, the LRN approach is intentionally narrowly focused on the **needs assessment and progress and quality monitoring of implementation** of the CSI. The LRN approach identifies the **“user” as the CSI coordinator** because though community school initiatives across the country are each unique in approach and in how they respond to their local context, a consistent component of the model has been a community school coordinator position, a role recognized nationally as critical to implementing the community school strategy. CSI coordinators are typically tasked with assessing, monitoring, and coordinating services, programs, and interventions for the CSIs that are aligned with and informed by community context. The LRN coaching model recognizes this aspect and is designed to fit into the typical work of a CSI coordinator and to elevate a CSI coordinator as a change agent in the school, empowering them to use data to support continuous improvement in the implementation of the CPS initiative. Also aligned with the principles of improvement science, **at the core of the LRN coaching model is the use of data**, collected both as part of compliance reporting required by CSI funding and as a mechanism for conducting an ongoing, robust needs assessment to inform programs and services.

Beyond incorporating the principles of improvement science, the format and sequence of LRN draw heavily from improvement science's Plan-Do-Study-Act (PDSA) cycles. PDSA cycles are cycles of data collection, analysis, and action steps that are completed in a window of 4–6 weeks. LRN uses the PDSA framework to structure the cadence of data collection, coaching sessions, and steps to bring the needs assessment, progress, and quality monitoring documentation to completion. Specifically, using the PDSA cycle as a structure allows CPS Directors to identify

actionable steps, based in trends in current data, that can be accomplished within 4–5 weeks, thus making tasks associated with their roles more manageable. Last, the LRN coaching approach embraces the power of networks to spur innovation among sites centered in data-based discussions about commonly collected data across sites. Exhibit 2 summarizes the key activities and processes associated with the LRN intervention. The graphic outlines the actions that occur within the LRN process monthly and annually, spreading out data collection across several key points in time. For example, interest surveys occur early in the year to inform planning for the remainder of the year. Then in spring, surveys to capture experiences in programing occur after students and families have had ample time to participate in CSI activities. Stakeholder conversation captures (described in more detail later in this proposal) occur monthly to provide real-time and ongoing information about needs and offer the opportunity to make timely adjustments to implementation. Next, we describe the core components of the LRN model in greater detail.

Exhibit 2. A New Model for Supporting CSI Implementation: LRN Key Processes



The LRN coaching intervention includes four primary components that are implemented throughout the year:

- **One-on-one coaching sessions** with resource coordinators, predicated on the use of PDSA cycles, constrained to 4–6 weeks in length, to break down needs assessment, service planning, and continuous improvement tasks into smaller action steps aligned with the analysis of specific data. Employing the structure and cadence of PDSA cycles in LRN coaching distributes the work of completing these processes across the entire school year; allows for more frequent opportunities for reflection, stakeholder involvement, and course correction; and follows the natural cadence of how CPS Directors go about doing their daily work. Coaching meetings will be conducted virtually and typically last an hour. During each coaching meeting, the AIR coach will guide the CPS Director through a process of data reflection and meaning-making based on both enrollment and participation data and newly collected data, developing action steps (achievable in 4-week time frames) based on reviewed results to support improved program implementation or relationship development, and planning for future data collection activities (e.g., stakeholder interviews, survey administration, and quality monitoring).
- Facilitation of **structured meetings with school administrators** to review progress in implementation of the initiative, review data collected as part of the LRN process, collaboratively set goals for the remainder of the school year, and discuss action steps. These

meetings are facilitated by LRN coaches but led by the CPS Director. LRN coaches provide a facilitation framework for Directors that allows for them to take the lead in dialoguing with principals in relation to CPS implementation. The goals of these meetings are to empower the CPS Director in using data to guide discussions, support collaboration between Directors and administrators, and come to consensus on or reinforce common goals for the initiative.

- Facilitation of **learning through peer networks**. LRN network meeting are held in person during the school year. CPS Directors from all LRN schools are brought together for group training and reflection on progress in implementation of their initiatives and to collaboratively reflect on their data, share successes and challenges, and jointly problem solve common challenges. Bringing together the CPS Directors as a group spurs innovation across sites and fosters a sense of a common mission and goals across the initiative.
- A set of **validated tools and measures** to provide schools access to better and more complete data to support decision making. The LRN tools have been designed to support four specific data collection efforts:
 - **Service provision activity reports**. Monthly meetings include review of monthly service and activity reports that provide details on who is participating in programming and services; what they are participating in; who is joining CPS programming, leaving, and staying; and the progress being made toward key participation and attendance targets.
 - **Needs and experiences surveys**. Schools will deploy two common student and caregiver surveys, one to assess needs and one to assess experiences, both validated measures provided by AIR. Data from these surveys will be analyzed by the AIR team, and reports summarizing findings will be provided to each Director.
 - **Program quality assessments**. Directors will be trained to use the Program Quality Checklist (PQC) developed specifically for LRN. The PQC is an easy-to-use tool geared toward assessing the quality of expanded learning programming (one of the community school pillars). Directors will use this tool at least once a year to assess program quality, engage in follow-up conversations with program staff, and develop action steps as needed.
 - **Frequent, real-time input from members of the school community**. Conversation captures are a qualitative data collection tool developed specifically for use in LRN processes. Conversation captures are essentially a tool for conducting formal interviews and capturing the most relevant information in real time. Directors will be expected to conduct “conversations” (e.g., interviews) with at least six students, caregivers, and school staff members on a rotating basis each month. When conducting interviews with members of the school community, at least half of respondents will have participated in CPS activities and services and half will not have done so.

In sum, LRN provides Directors validated tools and measures that will result in data they can use to complete key processes—specifically, needs assessments, progress monitoring, and continuous improvement efforts. The LRN process also serves to generate documentation for a summary needs assessment at the end of an academic year, provides evidence of progress and quality monitoring, and should be used to support program planning for the following school year. In the following sections we provide more details on how we anticipate implementing the LRN approach with CPS sites, including details about our coaching supports and proposed

calendar, how we will approach data collection and report generation, our project management approach, and key project deliverables.

LRN Implementation and Scope

We anticipate that up to 10 CPS sites will be participating in the initial CPS LRN cohort. The UCF Center has identified January 2025 as the start date for the pilot of LRN in CPS sites. To ensure that the LRN project is attentive to CPS site and partner needs and to provide a gradual introduction to new data collection and interpretation of program data, we propose a period of introduction in the first 5 months of the project, with a complete launch of LRN coaching in the 2025–26 academic year. Next, we provide details about LRN coaching supports, data collection activities and tools, and a proposed timeline and scope for each period of project activity.

LRN Coaching Assistance

Each school will be assigned an individual LRN coach who will meet virtually with school CPS Directors each month of the project, except for months in which a network meeting takes the place of the coaching meeting (three times per year). LRN coaches are experienced technical assistance providers, trained in improvement science methods and deeply familiar with the community schools initiative. LRN coaches will

- meet with the CPS Director monthly during the school year to guide them through data review, prepare them for additional data collection, and assist them in tracking their progress in completing a needs assessment, data-informed service planning, and continuous improvement processes;
- provide guidance and support in identifying trends in data and connecting findings from different data sources to inform action steps and support continuous improvement;
- support strategic meetings between Directors and principals;
- coach Directors on considering the stakeholders with whom to share their progress and information from their data collection efforts; and
- facilitate in-person kickoff meetings, midyear network meetings, and annual closing network meetings.

LRN coaches serve as the core support for CPS Directors engaged in this process. Although coaches have planned activities throughout the year, they are available for up to 2 hours per month for on-demand assistance for schools as they navigate the process of data collection. Next, we describe in detail the core components of the LRN coaching program: coaching sessions, network meetings, and data collection activities.

LRN Coaching Sessions Overview

All LRN coaching sessions will last from 1 hour to 1.5 hours depending on the content to be covered and will be conducted virtually. In each coaching session, LRN coaches will prepare Directors for the next data collection activity (e.g., conversation captures, surveys, PQCs). In each session, Directors will be led through a standard process, accommodating for additional data reviews as new data are collected and processed.

A template agenda for an LRN coaching session follows:

1. Review of action items from previous sessions, updating and documenting progress
2. Review of student enrollment and attendance data
3. Review of data collection from previous month (as applies)
4. Planning for next data collection activities
5. Reviewing action items from this session and checking in on documentation
6. Discussion of sharing with other stakeholders

In each step, the LRN coach will work with the Director to identify action items as they relate to the trends in the data reviews. For example, helping the Director think through steps to identify a possible vendor to meet a student need identified through the student conversation captures. The LRN coach will help Directors break down action steps into doable 4-week action items in between coaching sessions. As the meeting progresses, LRN coaches will facilitate conversations to connect trends from one data source to another. For example, how might a recurring trend in enrollment data be related to data collected in the needs sensing surveys of students? The LRN coach will be responsible for capturing reflections on the data, identifying action steps, and monitoring progress in providing documentation of each data collection activity (e.g., uploading capture sheets or PQC scores). LRN coaching sessions are intended to be cumulative in nature, meaning that in each session the LRN coach will encourage consideration of the previous conversations, data trends, and action items throughout the year. In the following sections, we provide more details about the key activities that are part of the LRN data collection process, and how LRN coaches will facilitate these activities.

LRN Network Meetings

Network meetings are intended to build collaboration, spur innovation, and provide additional opportunities for training and problem solving. Each network meeting incorporates these elements. Important to note is that each meeting has a unique purpose in the cadence of completing LRN activities. LRN coaches will develop materials and facilitate sessions, providing time for the UCF Center leadership team to provide feedback and make suggestions about meeting materials and goals.

LRN Key Data Collection Tools and Processes

In the following subsections, we describe in detail how LRN schools will engage with the key data collection tasks, how AIR envisions these tasks to be carried out, and the intended outcomes of these undertakings. Primary data collection tools and processes focus on the key components of LRN outlined earlier in this proposal.

Conversation Captures. Conversation captures provide valuable and rich perspectives of different groups representing the school community, providing insight into the current needs of the school and community. In addition, conducting the conversations (interviews) serves as a relationship-building activity for the Director that builds on other efforts during the year. Conversation capture data collection tools are easy-to-use templates that help guide the interview process, make note of key themes, and can be used to document interview findings and guide coaching discussions.

Conversation captures will be conducted throughout the contract. Given our previous experience in Chicago Public Schools, we believe that conversation captures are an important data source and, potentially, the most difficult to master of the LRN processes. Therefore, we have designed the LRN coaching series for CPS to include mastery of this process first, with other data collection occurring in the following school year. During the LRN project, each month Directors will identify at least six individuals from each group of interest, both participating in the initiative and not, and what they hope to learn from their discussions. Each conversation capture document includes specific questions that are related to the group of interest (e.g., students, caregivers, school staff) and that are asked of each person identified that month, space to capture detailed information about each respondent's demographic profile, and key learnings or themes that are shared during the conversation. To prepare for intentional conversation captures, coaches will help Directors identify which students, caregivers, or school staff members they would like to interview, based on the review of monthly data reports and any other data sources collected to date. For example, if there seems to be a trend of declining enrollment for sixth-grade Black males, the Director would be coached to identify students who are and are not participating in programming to learn about challenges or barriers to participation, current needs or interests, and how students learn about CPS offerings.

Student and Caregiver Surveys. At two points during the academic year, student and caregiver interest and experience surveys will be administered. Each survey will be administered electronically through the AIR data portal. The AIR LRN data team will then create individual reports for each survey, summarizing key findings and providing analysis of specific populations within each school. The LRN coach and AIR's LRN data team will work with Directors to plan for the deployment, sampling group, and timeline for each survey. The first student interest survey will be administered in fall, will provide valuable information to plan the rest of the year's activities, and will inform action plans and additional data collection. Student and caregiver experience surveys, administered in spring, will be administered only to participants in CPS services and programs and will provide valuable insight into the progress of the initiative in positively influencing the lives of students and families. Student and caregiver experience surveys are tested, validated instruments whose outcomes have been shown to correlate with student outcomes such as reductions in absences and behavioral issues and increases in students' sense of belonging and positive peer and adult relationships. Coaching support will be provided to interpret findings, triangulate with other data sources, and establish action steps from the deployment of each survey.

Program Quality Checklist. The PQC is a structured observational tool for expanded learning that will help Directors assess program and service offerings in 10 domains: Emotional Safety, Relationships, Belonging, Collaboration, Encouragement, Skill Building, Leadership, Session Flow, Participation, and Reframing Conflict. Directors will be trained to use the observational tool in the month prior to conducting observations. The tool is designed to be a light-lift rubric that provides data about quality and captures key reflections and notes for sharing with leadership teams or for structuring discussions with program and service providers.

LRN Dashboard. As part of every LRN coaching session and the administration and collection of data, AIR proposes to maintain a dashboard to collect all data (e.g., conversation captures, surveys, and PQCs) and track pertinent data observations, high-level themes, and action items in one place to provide Directors a longitudinal view of their efforts during the year. Maintenance

of this dashboard would require exports of data from the Learning Circle platform, at least in the first 5 months of the LRM project. The dashboard will provide a mechanism to distribute student and caregiver (and school staff, if desired) surveys, capture discussion points and documentation of conversation captures, and capture and update action items developed in coaching meetings. AIR is open to the possibility of some of this information being housed in the Learning Circle platform. Early conversations in January and February 2025 will inform the final conceptualization of this platform and how it will be instantiated.

CPS Sites LRN Timeline

In the sections that follow, we outline the proposed sequence of LRN coaching, data collection, and network meetings for academic Year 1 (January 2025–May 2025) and academic Year 2 (August 2025–May 2026; see Exhibit 3). AIR will work closely with UCF Center leadership to adjust the cadence and topics of focus as needed.

Preparation for the Launch of LRN (January–February 2025)

The first 5 months of the LRN project will provide a slow on-ramp to engaging in full LRN data collection in the 2025–26 school year. In the first 2 months of the project (January and February 2025), the LRN team proposes several activities to ensure a successful project launch with these schools and their CPS partners. These activities will include meetings to onboard key partners in the CPS initiative (e.g., LRN school principals, Children’s Home Society Leadership, Learning Circle). We anticipate that these meetings will occur virtually during January and February and will provide an introduction to the LRN process, a review of school and Director commitments, and opportunities for CPS initiative members to ask questions and raise potential challenges. The meetings will be led by the LRN leadership team and LRN coaches as an introduction to the project staff.

The AIR data team will hold additional meetings with Learning Circle, the CPS initiative’s data warehouse. Part of these conversations will focus on establishing the process for data transfers, and part will focus on providing specifications for building out monthly and annual reports. AIR anticipates that building out LRN reports will take longer than the initial onboarding period for CPS sites (January–February) and will plan to initially use the LRN data dashboard built for Chicago Public Schools. This approach will require monthly data imports from the Learning Circle system for the first 3 months of active LRN coaching sessions to populate reports in the LRN data dashboard.

During this time, LRN coaches will engage in efforts to gain a deeper understanding of the work that sites have already done in terms of the needs assessments and implementation in general and to better understand the school communities. Specifically, LRN coaches will use this time to review certification documentation and previous evaluation reports to learn the context of each school. LRN coaches also will begin initial outreach to site CPS Directors and administrators to introduce themselves and familiarize themselves with the schools and their communities.

From these initial efforts LRN coaches will develop materials for the LRN kickoff meeting and make adjustments to the coaching agendas, as needed, to ensure that the work as part of LRN supports each school’s unique priorities.

LRN Project Activities Timeline

The 2024–25 school year LRN activities will focus primarily on developing Directors’ understanding of assessing program data, identifying trends, and developing action items; giving Directors practice at conducting conversation captures, interpreting data, and applying findings to action items; and building out the Learning Circle platform to generate LRN-specific monthly and annual reports for use in the 2025–26 school year. Beginning with the 2025–26 school year, we anticipate launching the LRN project in full, with all data collection elements in place.

Network meetings will take place in March 2025, May 2025, August 2025, January 2026, and May 2026. The goals of each meeting are detailed next.

LRN Kickoff Meetings. The kickoff meetings will occur in March 2025 of Year 1 and, ideally, in August 2025 of Year 1. Because of the offset nature of the contract, the goals for each meeting will be slightly different. The first kickoff meeting will be the initial exposure to LRN, and the second kickoff meeting will reinforce what Directors have already learned, introduce additional data collection activities scheduled in the 2025–26 school year, support continuous improvement planning, and strengthen network connections.

The **initial kickoff meeting** in March 2025 will serve as an introduction to the LRN process and an “onboarding” to the analysis of CPS data. Directors will learn about the rationale and timing of data collection, the coaching meeting process, and understand the expectations of participation. Directors will do a deep dive into past needs assessments and action plans at their sites to provide an anchor for their next action steps for the remainder of the 2024–25 school year. Other goals of this meeting are to begin to develop cross-site connections, foster resource sharing and mutual support, and build a sense of community across schools engaged in LRN.

The **kickoff meeting held in summer 2025** (ideally in July or August 2025) will focus on revisiting what the Directors have learned about their sites through participation in the LRN process from March through May 2025. This session also will be used to introduce them to additional data collection efforts to be undertaken in the second year, including student and caregiver interest surveys and program quality monitoring. We anticipate providing a brief reintroduction and potentially some individual meetings with new Directors in the 2025–26 school year prior to the network meeting to onboard them to the LRN process.

Midyear Network Meeting. The goals of the midyear meetings (taking place only in the 2025–26 school year in this contract) are to recenter the work of the Directors and to provide a chance to collaboratively review data, train for additional data collection efforts (PQCs and student/caregiver experience surveys), and enhance connections across sites. Although the majority of the meeting will focus on data interpretation and training, additional intentions of bringing Directors back together in a network are to reinvigorate Directors to engage fully in the work and to provide a sense of camaraderie across sites.

LRN Closing Meeting. The closing meeting has two goals: to celebrate the year’s successes and to plan for the upcoming year’s implementation. Directors will highlight with peers the learnings of the past year and their progress in implementing the initiative. They will engage in meaningful reflection and planning for the coming year, setting goals and high-level action steps that will guide their activities come fall.

Monthly coaching sessions with CPS Directors will begin in September 2025 and will occur each month until the closing network meeting in May 2026. For each data collection activity occurring as part of the LRN process, CPS Directors will be provided coaching to identify the sampling framework and the logistical considerations in administering or conducting data collection prior to data collection. In the subsequent coaching or network sessions, Directors will be coached to review results, connect those results to trends in other data sources, and identify action items.

Facilitated Meeting With CPS School Leadership. To support the development of positive relationships between school administrators and CPS Directors, LRN coaches will facilitate a midyear meeting to share progress through LRN participation, establish shared goals between CPS Directors and school leadership, and develop action items for moving implementation of the initiative forward. Importantly, LRN coaches will work with Directors to prepare them to lead this conversation, including sharing Directors' interpretation of data trends. In this meeting the LRN coach is simply a facilitator of the conversation, allowing the Director to become the expert data analyst in the CPS initiative.

Exhibit 3 outlines a proposed monthly timeline for implementation of LRN coaching and meeting activities and data collection.

Exhibit 3. Proposed LRN Implementation Timeline

Month/year	Activity	Data collection activities					
Year 1		Student conversation capture	Caregiver conversation capture	School staff conversation capture	Student interest survey	Student/caregiver experience survey	Program Quality Checklist
March 2025	LRN kickoff meeting	X (Prep)					
April 2025	Coaching Session 1	X (Completion and review)	X (Prep)				
May 2025	Coaching Session 2		X (Completion and Review)				
May 2025	LRN closing network meeting						

Month/year	Activity	Data collection activities					
Year 2		Student conversation capture	Caregiver conversation capture	School staff conversation capture	Student interest survey	Student/caregiver experience survey	Program Quality Checklist
August 2025	LRN kickoff meeting	X (Prep)			X (Prep)		
September 2025	Coaching Session 1	X (Prep)					
October 2025	Coaching Session 2	X (Completion and review)			X (Administer)		
November 2025	Coaching Session 3		X (Prep)				
December 2025	Coaching Session 4		X (Completion and review)				

Month/year	Activity	Data collection activities					
January 2026	Midyear network meeting			X (Prep)	X (Review results)		
February 2026	Coaching Session 5/Principal meeting			X (Prep)	X (Review results)		
March 2026	Coaching Session 6	X (Prep)		X (Complete and review)		X (Prep)	X (Complete and review)
April 2026	Coaching Session 7	X (Complete and review)				X (Complete)	
May 2026	LRN closing network meeting	(Review annual results)	(Review annual results)	(Review annual results)	(Review annual results)	X (Review results)	(Review annual results)

LRN's Trajectory With CPS

The UCF Center has expressed the desire for AIR to provide at minimum 1 academic year of coaching to a cohort of 10 pilot schools in the 2025–26 school year. AIR will convene regularly with the UCF Center leadership to determine the usefulness and value-add of LRN coaching throughout the academic year. The intention of these pilot years is to determine the feasibility and efficacy of LRN in the CPS initiative. As a result, AIR will regularly collect feedback through brief surveys on the usefulness, applicability, and timeliness of LRN coaching and network meetings and will share the results of these surveys with the UCF Center team. If LRN is a viable and successful option for the completion of needs assessments, action planning, and progress monitoring in CPS sites, AIR will develop and implement a train-the-trainer model for positions designated by the UCF Center in the following years of this contract. The train-the-trainer model is an ideal avenue to follow if sustainability of the LRN model is desirable. If the UCF Center would like to pursue this option, AIR will develop a proposal outlining the scope and budget of additional works.

Project Management

The LRN project leadership team will facilitate monthly virtual meetings with UCF Center leadership to provide updates on project progress, discuss successes and challenges, and anticipate any potential barriers to implementation. The LRN project will provide a unique LRN email for all sites and Directors to address questions, updates, and concerns throughout the life of the project. The LRN project manager will provide planning support for network meetings and will work closely with the UCF Center team to ensure that network meetings are an enjoyable experience for participants.

The AIR team will conduct biannual satisfaction surveys of all CPS Directors participating in the LRN process to assess the usability and feasibility of expanding LRN beyond the confines of this project contract. Surveys will be administered in Airtable, and results will be compiled by the AIR data team. Results will be shared with the LRN coaches and CPS leadership in the spirit of continuous improvement. Based on these results and the deliverables listed next, the LRN leadership team will develop a sustainability plan for expanding LRN to other CPS initiative sites. LRN project leadership also will host annual in-person meetings, embedded in planning for other LRN network meetings, with CPS leadership to review progress, discuss next steps, and identify any potential barriers or challenges to implementation.

Key Deliverables

This technical assistance project will include three key deliverables:

- Finalized technical assistance plan
- Annual reports of sites' progress and engagement in LRN
- Summary results of biannual surveys of site Directors

In the first quarter, the AIR team will finalize a technical assistance plan that includes goals, time frames, and meeting objectives. Informational meetings from January and February 2025 will

inform the final technical assistance plan. The final technical assistance plan will be submitted at least 2 weeks prior to the kickoff network meeting to be scheduled in March 2025.

AIR will generate summaries of site progress in the LRN program annually in June of each project year, allowing CPS leadership to assess the value of participation in LRN as part of the CPS initiative. These reports will include summaries of student and family enrollment and engagement, action items developed by Directors and completion and progress rates, interest and experience survey results, and anecdotal summaries of Director participation in LRN.

Last, CPS leadership will be provided aggregate and site-level summaries of student interest surveys and student and caregiver experience surveys annually. In addition, AIR will provide CPS leadership aggregate results from satisfaction and usability surveys as part of the annual LRN report to CPS leadership.

Project Team Expertise and Experience

The following AIR staff members are highly suitable for the work, given their expertise, knowledge, and experience in leading similar projects.

Dominique Bradley, PhD, will serve as **Co-PI and coaching lead**. Dr. Bradley will provide thought partnership and oversight for the coaching team and will collaborate with Co-PI Neil Naftzger to coordinate data reports and survey administration, collection, and reporting. Dr. Bradley is a senior researcher at AIR and is the codeveloper and project lead for the LRN for Chicago Public Schools community schools. In this role, she provides direct coaching support for school resource coordinators participating in LRN, oversees and trains LRN coaches, and assists in the development of tools and processes in the LRN coaching framework. Dr. Bradley also serves as the qualitative research lead for evaluations of the Community Schools Initiative and Sustainable Community Schools for Chicago Public Schools and the research lead and project director for the Community Partnership Schools Initiative evaluation with the University of Central Florida. Dr. Bradley's research on community schools initiatives focuses on schools' implementation practices and on how implementation of these initiatives can support better outcomes for students, families, and schools. Dr. Bradley has contributed to knowledge in the field of community schools by developing theories of key components of implementation to support shared vision development, collective leadership, and robust and meaningful evaluation for continuous improvement. Dr. Bradley was the deputy director and coaching lead for the Networked School Improvement Community in the Long Beach Unified School District, funded by the Bill & Melinda Gates Foundation. She also serves as a partnership facilitator, researcher, and technical assistance trainer for Regional Educational Laboratory Midwest. Dr. Bradley has more than 15 years of experience in education research and project management and holds a Project Management Professional certification. Her areas of expertise are in implementation evaluations, qualitative research methods, improvement science methods, developing and supporting networked improvement communities, and supporting and evaluating research-practice partnerships.

Neil Naftzger, PhD, will serve as **co-PI and LRN data lead** for the project and will provide thought partnership and oversight to the project team. Dr. Naftzger will oversee the LRN data team in the creation of LRN reports, survey data collection, and data reports. Dr. Naftzger is a

principal researcher working on community school, afterschool, and youth development initiatives at AIR. An experienced evaluator and researcher, Dr. Naftzger has spent 2 decades designing and conducting evaluations and research studies in the community school, afterschool, and youth development arenas that involve the collection and analysis of data in various forms, particularly in relation to the 21st Century Community Learning Centers program and, more recently, community schools initiatives. Dr. Naftzger has led multiple evaluations of community schools initiatives administered by Chicago Public Schools, including the Community Schools Initiative, the Sustainable Community Schools Initiative, and federal Full-Service Community Schools grants received by the district. He is a codeveloper in the LRN pilot project in Chicago Public Schools. He has served or currently serves as the principal investigator or senior advisor on projects to evaluate the Community Partnership Schools Initiative administered by the Center for Community Schools at the University of Central Florida; the Restart SMART Initiative managed by Higher Ground in Tucson, Arizona; and a Full-Service Community Schools grant administered by Lewis University. He has authored or coauthored more than 70 research and evaluation reports and papers in the last 20 years.

Christine Koerner will serve as **Project Director** and **LRN coach** and will serve as the main contact for the UCF leadership team. Ms. Koerner is a Technical Assistant at the American Institutes for Research (AIR). Her work involves developing, coaching, and facilitating improvement science efforts, including the development and facilitation of Networked Improvement Communities, network meetings, one-on-one coaching sessions. She currently serves as an improvement science coach working with educators, including teachers, school and district administrators, and community school directors, in Long Beach Unified School District, Milwaukee Public Schools, and the Flint Network for School Excellence. Previously, she served at the Oklahoma State Department of Education and helped develop and facilitate statewide communities of practice and networked improvement communities. Christine brings extensive experience and expertise in educational leadership and in leading systemic improvement efforts at the local, state, and national levels.

Lisa Molinaro-Krohn will serve as an **LRN coach** and is a technical assistance consultant at AIR. Her work involves coaching and consultation in improvement science and facilitating networked improvement communities, conducting district-level needs assessments, and developing sustainable improvements with stakeholders in community schools. She currently serves as an improvement science coach in Long Beach, California; Milwaukee Public Schools, Wisconsin; the state of Illinois; and Flint, Michigan. Lisa brings extensive experience in educational leadership, particularly in curriculum and instruction, systemic improvement, MTSS (multitiered system of supports), and mathematical pedagogy. Lisa's expertise spans educational leadership, systemic change, curriculum and instruction, competency and standards-based academics/grading, data-driven learner-centered education, improvement science (PDSA), networked improvement communities, and pedagogy.

AIR supporting staff on this project will include a project manager to support outreach and communication activities with LRN continuous improvement coaches and participating schools. The project manager also will work with the UCF Center staff to plan the logistics of all network meetings. We also will work with AIR's editing and design department to review and finalize all network and coaching materials.

Budget

The cost to complete the proposed scope of work articulated in the preceding sections is \$348,520 for the project from January 1, 2025, through May 30, 2026 (Exhibit 4).

Notwithstanding any budgetary information provided herein, payment for services will be provided on a firm fixed-price basis. AIR's standard payment terms are net 30-days from receipt of a valid and accurate invoice. AIR's proposal is contingent upon negotiation of mutually agreeable terms and conditions, including a payment schedule, and AIR shall not be bound by the terms and conditions of any preprinted purchase orders.

This offer is good for 120 days from the due date of November 1, 2024. AIR reserves the right to review its submitted pricing to determine additional period(s) necessary for extension of the offered pricing or to revise its price quote after expiration of 120 days or any subsequent offered validity period(s).

Exhibit 4. Proposed Project Budget

BUDGET SUMMARY ALL YEARS	PERIOD 1		PERIOD 2		TOTAL	
Labor	Hours	Cost	Hours	Cost	Hours	Cost
Total Labor	1,234	\$212,712	619	\$106,305	1,853	\$319,017
ODCs						
Conf/Meeting Participants		1,977		1,318		\$3,295
Outside Services		119		119		\$238
Travel		15,582		10,388		\$25,970
Total ODCs		\$17,678		\$11,825		\$29,503
Total Firm Fixed Price	1,234	\$230,390	619	\$118,130	1,853	\$348,520

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