

HHS/ED COMMITTEE #2
December 10, 2007
Update

MEMORANDUM

December 6, 2007

TO: Health and Human Services Committee
Education Committee

FROM: Essie McGuire, Legislative Analyst *EMC*
Vivian Yao, Legislative Analyst *VY*

SUBJECT: Update – Kennedy Cluster Project

Today the Health and Human Services (HHS) Committee and the Education Committee will receive an update on the status of the Kennedy Cluster Project. The following individuals are expected to attend and discuss this project with the Committees:

- Nancy Navarro, President, Board of Education
- Jerry Weast, Superintendent, Montgomery County Public Schools (MCPS)
- Charles Short, Special Assistant to the County Executive

Other representatives from the Department of Health and Human Services (DHHS) and from MCPS will also attend.

The Council funded a total of \$250,000 in FY08 to support this interagency project designed to increase academic and social achievement by coordinating community, non-profit, and government stakeholders in a specific community area. Of the total, \$150,000 was requested by the Board of Education and funded in MCPS, and the remaining \$100,000 was requested by the County Executive and funded in DHHS.

Both MCPS and DHHS provided memoranda updating the status and progress of their efforts. These updates are attached, MCPS beginning at ©1 and DHHS beginning at ©5.

The updates cite the development of two interagency committees to direct and conduct the project. First, a governance committee will be comprised of Councilmember Ervin, Board President Navarro, Superintendent Weast, and Mr. Short. Second, an operations committee will include the directors of DHHS, Recreation, and Community

Use of Public Facilities (CUPF), and staff from these departments as well as from the Council, Board of Education, and MCPS (full membership is listed on ©2).

In addition to the establishment of this structure, both memos detail the efforts to date (MCPS on circles 3-4; DHHS on circles 5-6). MCPS is in the process of completing its RFP process for a research vendor, and DHHS has just completed its process to select the consultant for the project.

It is clear from both updates that the project is still in the initial stages. Given the current status, it will be important today to understand the steps ahead for the remainder of the fiscal year and what outcomes are reasonable to expect. As the Committees approach FY09 budget discussions, they will also need to understand the expenditure of funds in FY08 and a more specific timeline and project description for the second year of the project.

The Committees may want more information about the following items during this worksession, if available, or through a written update in advance of FY09 budget discussions:

- A report of the operations committee meeting referenced at ©6 that is scheduled after the print deadline of this packet but prior to this worksession.
- Additional information about the research project highlighted at ©3 including the timing and process for selecting the vendor, the overall timeframe for the research portion of the project, and a description of the research questions to be answered.
- The strategic plan that is being developed for the project described at ©6 with objectives, timeline, benchmarks and action steps.

Office of the Superintendent of Schools
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

December 4, 2007

MEMORANDUM

To: Members of the Board of Education

From: Jerry D. Weast, Superintendent of Schools 

Subject: Update on the Kennedy Cluster Project

This purpose of this memorandum is to provide an update on the work-to-date and current status of the John F. Kennedy High School Cluster Disparities and Performance Project (the Kennedy Project).

Executive Summary

A strategic initiative of the Montgomery County Public Schools (MCPS) is to eliminate the achievement gap for African American and Hispanic students. MCPS has established an exceptionally positive record in moving toward this goal over the past eight years. Both Hispanic and African American students have demonstrated significantly improved academic performance. However, particularly among African American students, progress has not been as widespread as we would like. The charge of the Kennedy Project, a joint effort between MCPS and the Montgomery County government, is to create a service delivery model for African American students that will accelerate the progress already under way to significantly improve academic achievement for these students. A project team is working collaboratively to identify the services necessary to address the root causes and barriers that inhibit or discourage African American students from achieving their full academic potential. In addition to identifying changes and services that may be needed within the schools, the project team will identify and provide recommendations to the County government regarding the coordinated services needed to complement educational services and eliminate communication barriers between and among the school system and county departments and agencies.

Background

The Kennedy Project was conceived by Ms. Valerie Ervin, County Councilmember; Ms. Nancy Navarro, Board of Education president; and myself in the spring of 2007, as a pilot to "create an educational service model for African American students to break down institutional discrimination, reduce educational and social disparities, and identify the types of County services that can be mobilized to address issues associated with poverty and its impact on school performance." Ms. Ervin and Ms. Navarro, with my strong support, proposed a Fiscal Year (FY) 2008 budget for the project of \$250,000, to be used for research and project management. The

Board supported \$150,000 of that request in its FY 08 Operating Budget and the County Council funded the remaining \$100,000 in its FY 08 budget.

John F. Kennedy High School (Kennedy) and four of its feeder schools, Argyle Middle School, Bel Pre Elementary School, Georgian Forest Elementary School, and Strathmore Elementary School, were selected as the sites for this project. There are 3,554 students attending these five schools, with a large percentage of African American students and a growing population of Hispanic students. Located within the MCPS identified "red zone," the cluster is heavily impacted by poverty with 49 percent of students in the project schools qualifying for Free and Reduced-price Meals System (FARMS) services. The cluster is characterized by high student mobility and low graduation rates. Argyle Middle School is part of the three-school Middle School Magnet Consortium. While it is the base school for the three elementary schools in the Kennedy Project, it receives students from throughout the county. At the completion of Grade 8, Argyle Middle School students can select from among the five high schools in the Downcounty Consortium, but the majority of its students articulate to Kennedy. There are three additional schools in the Kennedy Cluster—Col. E. Brooke Lee Middle School, Glenallan Elementary School, and Kemp Mill Elementary School—that were not selected to participate in the project due to the fact that these three schools articulate to both Kennedy and Northwood high schools, and the two elementary schools were involved in a boundary change due to the opening of Arcola Elementary School.

During the current school year, the Kennedy Project is largely a research project. It is important and necessary to have a rigorous and thorough examination of specific student-level variables associated with race and ethnicity. Student background information—such as gender, participation in FARMS, limited English proficiency, identification for special education services, and area of residency—is an important component of an exploratory analysis. School climate, student exposure to different interventions, school enrollment, courses completed, course grades, attendance, suspensions, and eligibility for extracurricular activities are other important factors that need to be examined for their effects on the achievement gap. The study also will examine the correlation between teacher preparation and training and student achievement. Finally, the project will examine and identify the coordinated county services to students and their families that are necessary to complement educational efforts.

I selected Mr. Donald Kress, former chief school performance officer, to manage the Kennedy Project for the school system. Mr. Isiah Leggett, county executive, has recently designated Mr. Charles Short, special assistant to the county executive, to head a committee to provide governance for the project. That governance committee is comprised of Mr. Short, Ms. Ervin, Ms. Navarro, and me. An operations committee will receive direction from the governance committee. The operations committee is comprised of Mr. Gabriel Albornoz, director, Department of Recreation; Dr. Uma Ahluwalia, director, Montgomery County Department of Health and Human Services (DHHS); Ms. Fran Brenneman, director, Child and Adolescent Mental Health Services, DHHS; Ms. Kate Garvey, chief, Children, Youth and Family Services, DHHS; Ms. Ginny Gong, director, Interagency Coordinating Board; Ms. Sonya Healy, chief of staff to Ms. Ervin; Mr. Roland Ikheloa, chief of staff to the Board of Education; Mr. Kress; and Dr. Frieda Lacey, deputy superintendent of schools.

Accomplishments to Date

The following elements of the Kennedy Project are in place as of this date:

- All three elementary schools are participating in the MCPS Professional Learning Communities Institute (PLCI). MCPS created the PLCI in 2005 to help school leadership teams increase student achievement and eliminate the achievement gap by developing and strengthening a climate at each school devoted to continuous learning and professional growth. The PLCI provides intensive support and training for participating school teams throughout the school year. The PLCI experience helps teams to examine their own belief systems and empowers them to establish and communicate high expectations for all students. PLCI also builds the capacity of school leaders, including teacher leaders, to make instructional decisions that lead to increased student achievement.
- Full-day pre-K classes have been implemented at Georgian Forest Elementary School, and half-day pre-K classes at Bel Pre Elementary School. (Georgian Forest is a pre-K–5 Title I school; Bel Pre is a pre-K–2 school; and Strathmore is a Grade 3–5 school.)
- Increased supervision by school administrators, supported by members of the Offices of School Performance and Curriculum and Instructional Programs, is ensuring that all content-area curricula is being taught and that appropriate formative and summative assessments are being administered with fidelity.
- Individual student achievement data are strategically monitored and are used to provide targeted interventions, including the development of individual student academic intervention plans.
- The Montgomery County DHHS developed and released a Request for Proposal (RFP) for the county's side of the project. Mr. Kress participated in reading and scoring the applications that were received in response to that RFP and in interviewing the vendor selected—Catalyst Health Concepts of Potomac, Maryland. Mr. Kress has participated in meetings among staff from DHHS and the principals of Catalyst Health Concepts.
- The Diversity Training and Development Team, Office of Organizational Development, under the leadership of Ms. Donna Graves, supervisor, is directing, through focused professional development on the topics of institutional racism and equitable classroom practices, the continued growth of an internal culture of high expectations within each of the project schools. Mr. Bryan Avila, an instructional specialist on Ms. Graves' team, is providing direct support to the staff development teachers in the project schools.
- The Department of Shared Accountability (DSA) developed research questions for the project, and Mr. Kress has been seeking an outside vendor to conduct the project

research. Selection of a vendor should be completed in early December, and work on the research will begin immediately thereafter.

- The Kennedy Cluster Project Team, chaired by Mr. Kress, held its first meeting in November, and will be meeting monthly throughout the school year. In addition to Mr. Kress, the team is comprised of Dr. Heath Morrison, community superintendent; Ms. Bronda Mills, director of school performance; Mr. Bryan Avila, instructional specialist; Ms. Janine Bacquie, director of early childhood programs; Dr. Janet Johnson, pupil personnel worker; Dr. Clare von Secker, DSA; and the principals of the project schools. Dr. Donna Lloyd-Kolkin and Dr. Gloria Stables of Catalyst Health Concepts will join the team beginning with its next meeting, as will the vendor selected to conduct the research study for MCPS.
- Advisors to the Project Team are Dr. Karen Mapp, professor at Harvard University; Dr. Pedro Noguera, professor at New York University; Dr. Theresa Perry, professor at Simmons College and co-author of *Young, Gifted, and Black: Promoting High Achievement Among African-American Students*; and Dr. Glenn Singleton, co-author of *Courageous Conversations About Race*.

Conclusion

The Kennedy Project represents a new systemic response to children and families by the Montgomery County government and MCPS. The project is designed to recognize that student achievement does not just happen in the schoolhouse, and that closing the achievement gap for African American students will require a commitment of services from a range of agencies. This comprehensive approach to help all students succeed will require suspending long-held rules and conventions, while we work together to build a new protocol for serving our neediest students and their families based on a shared vision that puts the needs of our children and their families first. I will continue to provide updates on this project.

JDW:la

Kennedy Cluster Project Update
December 2007

Summary:

On March 8, 2007, Councilmember Valerie Ervin addressed a memo to the Council Health and Human Services (HHS) and Education (ED) committees entitled the "Disparity and Performance Project." This memo communicated her vision for a project that would focus on closing the achievement gap for African Americans students and identified the need for funding and coordination among key partners to address these needs. Council approved funding for the Department of Health and Human Services to release a Request for Proposal (RFP) to seek out consultation support to coordinate this project. Below is a summary of the progress that has been made thus far and the key next steps that will be taken.

Progress to Date:

- RFP was sent out on July 30 with a closing date of August 15, 2007
 - The QSC reviewed and interviewed the finally selected Catalyst Health Concepts (CHC) on August 30
- Don Kress (MCPS representative) Donna Lloyd Kolkin and Gloria Stables (Catalyst Health Concepts consultants) and Fran Brenneman (HHS representative) have met several items to discuss the project and to outline planning of initial meeting
- CHC consultants have visited all schools and met with all Principals in the Cluster
- Policy meeting was held November 21 to lay out plan for the project. Attendees at this meeting included Council Member Valerie Ervin, Superintendent Jerry Weast, Special Assistant to the County Executive, Chuck Short and other leadership from DHHS, Recreation, the Board of Education and MCPS.
 - At this meeting, the leadership approved a two-tier approach. The first includes a Senior Leadership Policy Steering Committee and a second tier Implementation Committee.
 - The project will strive to provide a coordinated multi-departmental county and community service approach to complement educational services. The goal is to eliminate communication barriers between and among MCPS and County departments and agencies in the provision of services aimed at addressing the social determinants that impact the educational achievement gaps.
 - Input and feedback from students, parents, teachers and other key stakeholders will be solicited continuously throughout the project using multiple media, including small group discussions, meetings and a dedicated website.

- First meeting of the Implementation Committee is scheduled for December 7. For that meeting, consultants will provide:
 - Research on what other school systems are doing around the nation to close the achievement gap
 - Ideas about focus groups
 - Sketch of their new website for this project
 - One-page document that captures the goals, process and background for the project that could be shared with interested parties in the community and the schools
 - Data on the current state of achievement in the cluster as well as other demographic information on the youth and families who live in the cluster area

Plans for the Future:

- A strategic plan will be developed utilizing a graphic facilitation method to help the workgroup members develop the individual components of the strategic plan
- Surveys and focus groups with parents, students, MCPS personnel, community providers and other interested residents in the Kennedy Cluster
- Development of a tracking system: a project management database to monitor all action items completed in a timely manner
- A website that will contain information about the project's purpose for public review. The website will provide a "feedback" function in which individuals can provide comment on all or specific aspects of the process. It may include a blog or list serve as well. CHC staff will monitor and update this site daily.
- For those not able to use the website, notebooks with appropriate information will be placed in the school library or other appropriate places. A poster will be developed to draw attention to these notebooks.
- A national literature review and identification of best practices for closing the achievement gap will be completed and information will inform the project.
- Development of a gap analysis and situational analysis based on the service analysis and best practice approach.
- Development of agency-specific and system wide performance measures that are data specific and linked to the outcomes identified in the strategic plan
- Development of instruments, data collection, analysis and reporting of targeted surveys as requested by the workgroup.
- Monthly summaries of activity of the project will be provided, as well as final report of the project will be completed by CHC.

SECTION C - SCOPE OF SERVICES:**A. Background/Intent**

Since its creation in 1999, the Montgomery County Public Schools (MCPS) Strategic Plan has provided the foundation for the implementation of substantial academic reforms. These reforms have helped transform the school system and have significantly improved student achievement. However, differences continue in academic achievement by race and ethnicity, disability, economic status, and language. There is a wide variance in student performance among and within schools and in preparation for success beyond high school. These disparities formed the basis for much of what was developed initially in the 1999 Strategic Plan and remains the significant foundation of the strategic plan now under way.

Recently, Montgomery County Public Schools Superintendent Dr. Jerry Weast, County Councilmember Valerie Ervin, and School Board President Nancy Navarro have joined with stakeholders including County Executive representatives, County Council members, School Board members, school administrators, and community leaders to discuss and document disparities in educational benchmarks for children of color in County schools. It has been established that academic achievement is negatively affected by a number of factors including: poverty, family and school instability, low educational attainment of parents, and low expectations by school or home. As with other indicators related to students' success in school, the positive supports children receive from their families and communities, as well as the quality of school climate, both in terms of support for students and overall safety and youth connectedness to the school community, strongly influence their success in school. In many areas, traditional strategies to promote academic success for all students have not been effective.

In FY08, the County will implement the *Disparities and Performance Project* (also known as the Kennedy Cluster Project), a pilot project that seeks to extend the search for culturally competent and culturally effective strategies to address barriers to academic success for children of color both within and beyond the school and into the community. The project will examine the community context in which the schools function in order to evaluate factors both inside and outside the classroom that limit or prevent success for all students. The Disparities and Performance Project will create an educational and service model to reduce educational and social barriers and identify the type of County services and educational approaches that can address the root causes of the achievement gap. A Disparities and Performance Project Workgroup, composed of key individuals from MCPS and County agencies, non-profit agencies, and community members and leaders, will be established to work collaboratively to identify and design the services necessary to address the root causes of the achievement gap and make recommendations for change. The project is targeted to increase the academic and social achievement of all students attending Bel Pre, Georgian Forest, and Strathmore Elementary Schools, Argyle Middle School, and Kennedy High School.

The County, through its Department of Health and Human Services (DHHS), seeks an experienced, qualified, and culturally competent entity to facilitate the Disparities and Performance Project. The anticipated date of service commencement is on or about October 1, 2007.

B. Work Statement/Specifications

1. The Contractor must serve as facilitator for all components of the Disparities and Performance Project. In doing so, the Contractor must:
 - a. Coordinate all meeting logistics, including securing a facility, planning/announcing/scheduling upcoming meetings, supplying the Disparities and Performance Project Workgroup members with nametags/nameplates, developing agendas and meeting packets, facilitating/recording meeting discussions, preparing/disseminating meeting minutes, and providing sufficient copies of all Workgroup materials;
 - b. Convene and provide support to all subgroups of the Project Workgroup, including focus groups of students, parents, MCPS teachers, staff, and administrators and community members, and for meetings with stakeholder groups, and meetings with key individual stakeholders;
 - c. Deliver an effective communication model that links all key partners and assures adequate community feedback and information;

- d. Facilitate inter-agency collaboration and decision making to develop culturally competent service strategies and interventions to address disparities in educational achievements;
- e. Identify other culturally competent models and best practices that will assist in the development of a local model to address disparities in the specific communities identified through the analysis in g., below, as needing interventions and supports;
- f. Develop questions and formats for and administer questionnaires/surveys, as requested by the Workgroup;
- g. Provide data collection and analysis and conduct research as required by the Project and give technical assistance in the use of assessment tools and data in management of the Project;
- h. Provide technical assistance to the Project Workgroup in developing agency-specific and system-wide performance measures;
- i. Ensure timely follow-up and completion of action items resulting from all Workgroup and subgroup meetings;
- j. Prepare all draft and final reports and Project documents according to established timelines; and
- l. Provide refreshments (snacks, drinks, etc.) for an estimated 15 meetings of the 15-member Workgroup and an estimated 30 meetings of 5-8 member subgroups (meetings may occur mid-morning, mid-afternoon, and/or early evening).

2. The Contractor must perform, at a minimum, the tasks detailed below with input and under oversight from the County. The specific dates for completion of tasks will be decided between the County and the Contractor within 15 days of execution of the Contract. The Contractor must:

- a. ensure that the first of the Workgroup meetings take place within 30 days of contract execution and that subsequent meetings are held on a regular basis thereafter;
- b. develop a Disparities and Performance Project Workgroup information packet to contain all information relevant to the mission of the Workgroup for distribution at the first Workgroup meeting. The Contractor must ensure that materials are updated prior to each meeting;
- c. provide technical assistance to assist the Disparities and Performance Project Workgroup with developing and finalizing a strategic action plan to guide the work of the Workgroup and provide a roadmap for decision-making processes. The strategic plan must include a statement of the mission, vision, and guiding principles of the Project, declared goals, outcomes, and objectives of the Project and County-approved timelines for achieving Project goals. The Contractor must complete the final document describing the strategic plan by the deadline established by the Workgroup;
- d. identify and make available data necessary to proceed with the Disparities and Performance Project, including current agency services available in the community, performance data, service needs, and gaps in services, and provide the data within 45 days of execution of the contract;
- e. review County best practices and national best practices and present the most promising of these to the Workgroup during its deliberations;
- f. based on information obtained through d. and e., above, develop a draft gap analysis (details related to existing gaps in services) and a draft situational analysis for the Workgroup's review; and

- g. provide the minutes of all Workgroup and subgroup meetings within one week of meetings.

All work products under the Contract including data, reports, presentations, and electronic media become the property of the County. All material on electronic media must be submitted in a format approved by the County.

C. Contractor Qualifications

The Contractor must have the expertise and capacity to perform assessments, provide work plans, facilitate the development of specific recommendations, submit reports to the County, and work in a collaborative manner with stakeholders. The Contractor must be able to perform the requirements of any Contract resulting from this solicitation with accuracy and precision and have the capacity to deliver work products within a short timeframe.

D. Contractor Responsibility

The Contractor must provide sufficient Contractor staff to accomplish all administrative and staffing requirements of the Disparities and Performance Project and to effectively supervise all employees, volunteers, and consultants who provide services under the Contract resulting from this RFP. The Contractor and its staff, as identified by the County, also must be available to meet periodically with the County's contract monitor pursuant to a meeting schedule to be prepared by the contract monitor.

E. Records and Reports

1. The Contractor(s) must provide monthly reports to the County, in a format approved by the County, no later than 15 days following the end of each month. The reports must include the following information, at a minimum:

- a. a summary of activities/services provided by the Contractor;
- b. a description of any action items developed by the Workgroup and the status of each item;
- c. an update of progress on the Project timeline; and
- d. any data collected, written/electronic materials prepared, and/or assessment tools developed during the month.

2. The Contractor must provide a draft Disparities and Performance Project Report, in a format approved by the County, within 45 days of completion of the Workgroup's activities.

3. The Contractor must provide a final Disparities and Performance Project Report, in a format approved by the County, by June 30, 2008.

SECTION D - PERFORMANCE PERIOD

1. TERM

The effective date of this Contract begins upon signature by the Director, Office of Procurement. The period in which Contractor must perform all work under the Contract begins on the Contract's effective date and ends on October 31, 2008. The Contractor must also perform all work in accordance with time periods stated in the Scope of Services.

SECTION E - METHOD OF AWARD/EVALUATION CRITERIA

1. PROCEDURES

- a. Upon receipt of proposals, the Qualification and Selection Committee (QSC) will review and evaluate all proposals in accordance with the evaluation criteria listed below under Section E.2.a.
- b. Vendor interviews will be conducted with the three highest-scoring offerors that achieve at least a score of 70 points based on the QSC's score for each written proposal. The interview criteria that will then be utilized is listed below under Section E.2.b. The QSC will also review an offeror for responsibility.

- c. The QSC will make its award recommendation of the highest ranked offeror based on the QSC's combined written and interview scores, and its responsibility determination.
- d. The Using Department Head will review and forward the QSC recommendation with concurrence, objection, or amendment to the Director, Office of Procurement.
- e. The Director, Office of Procurement, may approve, approve with conditions, or reject the Using Department Head's recommendations.
- f. Upon approval of a recommended award to a proposed awardee, the Director, Office of Procurement, will place the name of the proposed awardee on a public list located in the Office of Procurement.
- g. The County will then enter into contract negotiations with the proposed awardee.
- h. If a contract cannot be successfully negotiated with the proposed awardees, the Using Department Head may proceed to negotiate with the next ranked proposed awardees after obtaining approval from the Director, Office of Procurement.
- i. The County reserves the right to cancel the solicitation.

2. EVALUATION CRITERIA

a. Written Proposal Evaluation Criteria

Points

The QSC will evaluate the written proposals based on the following criteria:

(1)	Experience, qualifications, and capacity of the Offeror to perform the required Scope of Services	25
(2)	Professional competence of personnel assigned to the project as evidenced by the nature and extent of each person's public sector and other relevant experience	15
(3)	Plan to provide the required program of services including proposed work plan and resources applied to fulfill the scope of work and capacity to provide comprehensive, quality, coordinated, timely, and responsive services	25
(4)	Demonstrated experience with a collaborative approach to providing services, especially working with local governments, local school systems, local child-serving agencies, non profit agencies, and other local community agencies, and knowledge of local resources and contacts in communities, groups and organizations in the Kennedy High School cluster service area	25
(5)	Proposed project cost and justification of all costs	10
	Highest possible QSC score for written proposal evaluation	100

b. Interview Evaluation Criteria

Points

The QSC will evaluate the interviews based on the following criteria:

(1)	Overall quality, clarity, and responsiveness of the Offeror's answers to questions about the proposal and the Offeror's understanding of the work to be performed to meet the County's needs.	20
(2)	Qualifications and prior experience of the Offeror's organization and proposed personnel including experience in performing work related to the requirements of this RFP.	30
(3)	Knowledge of local resources and contacts in the target communities.	30
(4)	Proposed Cost and Justification of Cost.	20
	Highest possible QSC score for interview evaluation	100