



ABG SPED CONSULTING INC.

Technical Proposal

Special Education Program Review

Prepared for Westport Public Schools

RFP #27-003-RFP

Submitted by ABG SPED Consulting Inc.

306 W Redwood St, Ste 103, Baltimore, MD 21201

EIN 42-3467463 | UEI MAZSZP27XLP3

September 1, 2026

I. Cover Letter and Certification

Elio Longo, Chief Financial Officer

Westport Public Schools

110 Myrtle Avenue, Room 300

Westport, CT 06880

Re: RFP #27-003-RFP — Special Education Program Review

Dear Mr. Longo and Members of the Selection Committee:

ABG SPED Consulting Inc. ("ABG") is pleased to submit this proposal to conduct the comprehensive, independent, system-level review of Westport Public Schools' PK-12 special education programs and services described in RFP #27-003-RFP. This submission incorporates by reference the qualifications, team, and representations provided in our response to RFQ #26-025-RFQ, and identifies below any material changes to that submission.

Legal Entity and Authorized Signatory

- Legal Entity: ABG SPED Consulting Inc., a Baltimore, Maryland-based 501(c)(3) nonprofit organization
- EIN: 42-3467463 | UEI: MAZSZP27XLP3
- Address: 306 W Redwood St, Ste 103, Baltimore, MD 21201
- Authorized Signatory: Adriane Gay, CEO and Founder

ABG proposes to perform all services with its own personnel. Adriane Gay, CEO and Founder, will serve as Project Director. ABG proposes to engage two independent contractor (1099) specialists upon award — Dr. William Artis (Survey/Data Lead) and Nicole Davis (Onsite Observer/Qualitative Coder) — who will work under ABG's direct supervision, insurance, and confidentiality obligations. ABG does not propose a formal subcontracting or teaming relationship with another firm.

Proposal Validity

ABG confirms this proposal remains valid for at least 120 days from the date of submission.

Material Changes from RFQ Submission

ABG confirms no material changes to the organization, proposed team, availability, or qualifications represented in its RFQ #26-025-RFQ submission, other than the identification of the specific independent contractor specialists named in Section VII below.

Acceptance of Mandatory Proposal Commitments

ABG confirms its full acceptance of each Mandatory Proposal Commitment identified in Section 3 of the RFP, including: completion of the review within four to six months of kickoff; design, administration, analysis, and reporting of districtwide family and staff surveys; onsite visits and observations covering all school levels and major program types; interviews and focus groups with a balanced set of stakeholders; assignment of named key personnel including at least one individual with substantial special education leadership experience; FERPA-aligned data handling and aggregate/de-identified reporting; delivery of a final report, executive summary, and Board of Education presentation; and submission of a complete, transparent fee proposal under separate cover.

ABG identifies no exceptions to the Mandatory Proposal Commitments at this time.

Respectfully submitted,

Adriane Gay

CEO and Founder, ABG SPED Consulting Inc.

II. Understanding of Westport and Proposed Review Questions

Understanding of the District's Purpose and Context

Westport Public Schools has invested substantially in a broad continuum of special education supports across one preschool, five elementary schools, two middle schools, one high school, and one transition program, spanning early identification and RTI/MTSS structures, inclusive instructional settings, resource and intensive supports, related services, emotional/behavioral and mental-health supports, specialized programming, and transition/18-22 services. The District has requested an independent, system-level review — not a compliance audit — to determine whether this continuum is coherent, aligned to student needs, implemented consistently across buildings, supportive of the least restrictive environment (LRE), and associated with positive academic, behavioral, social/emotional, and transition-related outcomes.

ABG understands that community feedback has surfaced specific areas of concern that this review must engage directly: family satisfaction and communication; IEP service-delivery fidelity; outplacement criteria, trends, and costs; resource allocation; early identification and intervention; cross-school consistency; training and support for paraeducators and staff; mental-health and behavioral supports; access to classes, electives, and extracurricular opportunities; and transitions across grade levels. ABG further understands the review's explicit boundaries: it will not adjudicate individual complaints, issue legal findings regarding IDEA, Section 504, ADA, or FERPA compliance in specific cases, serve as a hearing officer or compliance monitor, or conduct a forensic fiscal or full ADA facilities audit. Any such matters identified in the course of the review will be considered only as they inform system-level findings, consistent with Section 6 of the RFP.

Proposed Review Questions

ABG proposes to retain the ten guiding review questions set forth in Section 4 of the RFP as the foundation of the review, refining them collaboratively with District leadership during the kickoff meeting described in Section III below. ABG's proposed refinement is to organize the ten questions into four analytic threads that will structure data collection, analysis, and reporting throughout the engagement:

- Continuum & Access — Questions 1, 4, 8: Is the continuum sufficient, coherent, and supportive of LRE and access to academic and nonacademic opportunities?
- Process & Fidelity — Questions 2, 3: Are early intervention, referral, evaluation, IEP development, and service delivery implemented consistently and with fidelity?
- Outcomes & Equity — Questions 5, 6: What do outcome and achievement-gap data show, and how are they communicated to families?
- Experience & Resources — Questions 7, 9, 10: How do stakeholders experience the system, how are resources aligned to need, and what actionable changes should follow?

This structure allows every subsequent methodology component — document/data analysis, surveys, interviews, and onsite observation — to be mapped explicitly back to one or more of the ten guiding questions, ensuring the final report demonstrates clear evidentiary lines from question to finding to recommendation.

III. Detailed Methodology and Work Plan

ABG proposes a comprehensive, mixed-methods, system-level review structured around the six components identified in Section 5 of the RFP. Each component below is addressed in turn.

3.1 Project Initiation, Governance, and Management

- Kickoff meeting with District leadership within the first two weeks of notice to proceed to confirm review questions, scope, data sources, roles, communication protocols, confidentiality expectations, and deliverable timing.
- A detailed project management plan (delivered within 10 business days of kickoff) identifying milestones, responsible parties, onsite/virtual work balance, meeting cadence (proposed bi-weekly leadership check-ins), decision points, dependencies, risks, and mitigation strategies.
- A comprehensive initial data/document request delivered at kickoff, with a standing weekly intake process for supplemental requests as analysis surfaces new questions.
- A single named Project Director with overall authority for scope, quality, and District communication, and a Project Manager responsible for day-to-day schedule and deliverable management (see Section VII).
- Scheduling and data-request practices designed to minimize burden on District staff, students, and families — including batching requests, using existing District data-extract formats where possible, and scheduling onsite work around the District's academic calendar.

3.2 Document, IEP, Data, Benchmarking, and Resource Analysis

ABG's document and data review will proceed in three phases: intake and inventory, analysis, and benchmarking.

- Intake and Inventory: Review of District policies, procedures, program descriptions, organizational charts, staffing models, caseload/workload data, service schedules, and professional-learning materials to build a current-state picture of the continuum prior to fieldwork.
- Quantitative Data Analysis: Review of aggregate and disaggregated data on enrollment, disability identification, referral/evaluation patterns, MTSS/RTI, LRE/placement, program participation, outplacement, attendance, achievement and growth, progress monitoring, graduation, and transition outcomes, disaggregated by school level, program, disability category, and placement type where data quality and privacy rules permit.

IEP/Record-Review Methodology

ABG proposes a stratified random sample of IEP records — targeting a minimum sample sufficient to support system-level (not building-specific) conclusions, stratified by school level, disability category, and placement type — reviewed against a structured rubric examining alignment among present levels

of performance, identified needs, goals/objectives, services, accommodations/modifications, placement, progress monitoring, and evidence of educational benefit.

ABG proposes a sample of a minimum of 10% of the District's special education population, or 100 records — whichever is greater — stratified proportionally by school level, disability category, and placement type. This figure will be confirmed against the District's actual enrollment count once received in the initial data request.

- **Reviewer Training and Inter-Rater Reliability:** All reviewers will be trained on the rubric using a shared calibration set of 8–10 records prior to independent review, with inter-rater agreement targets established before full-sample review begins; disagreements will be adjudicated by the Project Director.
- **System-Level Reporting:** Individual record findings will never be reported by name, building, or individual case; all IEP-review findings will be aggregated and reported as system-level patterns (e.g., percentage of sampled IEPs with fully aligned present-levels-to-goals linkage, by school level).

Benchmarking Approach

ABG will benchmark selected indicators against Connecticut statewide data, Westport's District Reference Group (DRG) where applicable, and a small set of comparable Connecticut districts selected using enrollment size, demographic profile, and program-type comparability. Where valid comparison data is unavailable or comparison groups are imperfect, ABG will disclose that limitation explicitly rather than present a benchmark as more definitive than the underlying data supports. All quantitative findings will distinguish correlation and association from causal claims, and will apply appropriate suppression rules for any subgroup below a minimum reportable size.

Staffing, Resource, and Cost-Effectiveness Analysis

ABG will analyze staffing ratios, caseloads, special education spending patterns, and outplacement costs at a system level in relation to student needs, services, and outcomes — explicitly as a program-effectiveness lens, not a fiscal or forensic audit, consistent with the scope boundary in Section 6 of the RFP.

IV. Family and Staff Surveys and Stakeholder Engagement Plan

ABG treats the family and staff surveys and stakeholder engagement as central, high-priority components of this review, consistent with Section 5.3 of the RFP.

4.1 Survey Development Process

- Draft instruments developed by ABG's survey lead in the first four weeks of the engagement, covering the domains specified in the RFP: communication and responsiveness; family experience with IEP/PPT processes; perceived service effectiveness and fidelity; access to supports; inclusion; mental-health and behavioral supports; transitions; access to academic and nonacademic opportunities; and overall satisfaction.
- District review and approval of both instruments before launch, with a defined turnaround window built into the project timeline (see Section IX).
- Both closed-ended (Likert-scale) and open-ended items on every survey, allowing quantitative disaggregation alongside qualitative theme capture.

ABG proposes to administer both surveys using SurveyMonkey (Advantage/Premier plan), which provides mobile-responsive design, WCAG-aligned accessibility features, multi-language translation support, and disaggregation/export tools appropriate to a single-district engagement of this scope, at a substantially lower cost than enterprise research platforms such as Qualtrics.

4.2 Response-Rate and Access Strategy

- Advance notice communication co-branded with the District, sent through District channels, explaining the purpose and confidentiality of the survey.
- At least two reminder waves during the open period.
- Mobile-compatible survey design.
- Translated versions in the District's most common non-English home languages.
- A defined minimum group size for any disaggregated reporting cell to protect respondent confidentiality.

4.3 Reporting Commitments

For both surveys, ABG will report the number of invitations distributed, completed responses, response rate, applicable denominators, subgroup representation, and methodological limitations. Where feasible, ABG will assess potential nonresponse bias by comparing respondent demographics to the underlying population. Consistent with the RFP's requirement, ABG will not characterize survey findings as districtwide unless participation and evidence support that conclusion, and will state explicitly where findings should be read as suggestive rather than representative.

4.4 Stakeholder Interviews and Focus Groups

ABG will conduct interviews, focus groups, or listening sessions with a balanced set of central office leaders, school administrators, general and special education teachers, related service providers, paraeducators, mental-health/behavior staff, students where appropriate and District-approved, and families. A consistent semi-structured protocol will be used across all groups, with sampling designed to capture varied perspectives across school levels, programs, disability profiles, placements, and service intensity.

ABG proposes 12–15 focus groups/interviews, approximately 90–120 total participants, distributed roughly as follows: 2 central office leadership sessions; 2 school administrator sessions; 3 teacher sessions (general and special education); 2 related-service provider sessions; 2 paraeducator sessions; 1 mental-health/behavior staff session; 2 family sessions; and 1 student session where District-approved. Final counts will be confirmed with the District liaison during kickoff.

All qualitative data will be coded using a shared codebook developed collaboratively by the qualitative lead and Project Director, with a second-coder review of at least 20% of transcripts to check coding consistency. ABG will explicitly distinguish isolated individual experiences from corroborated, cross-source patterns, and will triangulate stakeholder input against document, data, survey, and observation findings before including any theme in the final report. All engagement findings will be reported in aggregate, de-identified form and used solely to identify system-level themes.

V. Site Visit and Observation Plan

Consistent with Section 5.4 of the RFP, onsite visits and observations are treated as a central, high-priority component of this review.

5.1 Coverage

ABG proposes to visit all nine District buildings (one preschool, five elementary schools, two middle schools, one high school) plus the transition program, ensuring representation of every school level and major program type without relying on building-level sampling that could weaken cross-school conclusions.

ABG proposes 18–20 onsite days across the engagement, using two observers — Project Director Adriane Gay and one additional contracted observer with a special education background — to ensure full building coverage across all nine District sites plus the transition program, without compromising calibration consistency. Onsite work will be distributed across Months 2–4 of the engagement rather than concentrated in a single visit window, to accommodate scheduling with each building.

5.2 Observation Settings

Observations will sample across general education/inclusion settings, co-taught classrooms, resource supports, intensive and specialized programs, related-service delivery, clinical/therapeutic and behavioral supports, transition/18-22 programming, and nonacademic/extracurricular contexts where feasible.

5.3 Structured Observation Protocol

ABG will use a structured observation instrument aligned to the guiding review questions, capturing: evidence of LRE and inclusive practice; access to grade-level instruction; specially designed instruction; service-model implementation; student engagement; instructional supports and accommodations/modifications in use; and indicators of student independence and belonging. Observers will document findings using a shared field-note template that separates factual observation from interpretation, supporting later aggregation.

5.4 Observer Qualifications, Training, and Calibration

All observers will hold relevant special education backgrounds (e.g., former special education teachers, administrators, or related service providers). Prior to fieldwork, observers will complete a calibration session using shared video or in-person practice observations, with agreement checked against a reference scoring before independent observation begins.

5.5 Coordination and Aggregation

All visits will be scheduled through the District liaison to minimize disruption, and no individual student or staff member will be identified or evaluated in any observation record. Observation findings will be aggregated across buildings and triangulated with document, data, survey, and stakeholder-engagement findings before inclusion in the final report.

VI. Data, IEP, Benchmarking, and Resource Analysis Plan

This section summarizes the quantitative analysis plan detailed in Section III above and extends it to the specific achievement-gap and resource questions the RFP identifies as required components.

6.1 Requested Datasets and Documents

- Special education enrollment, identification, and disability-category data by school and grade level
- Referral, evaluation, and MTSS/RTI process data
- IEP records (per sampling plan in Section III)
- Placement and LRE data by school and program
- Outplacement records, including placement type, duration, and cost
- Staffing rosters, caseloads, and service-delivery schedules
- Attendance, discipline, and behavioral-incident data disaggregated by disability status
- Academic achievement and growth data disaggregated by disability status
- Graduation and post-secondary/transition outcome data
- Special education budget and expenditure data

6.2 Achievement and Growth Gap Analysis

ABG will analyze trends and gaps between students with disabilities and students without disabilities in academic achievement and growth using the District's existing measures of grade-level progress or mastery, and will separately document how the District currently communicates student progress to families of students with disabilities — a step required to answer Guiding Review Question 6 in full.

6.3 Boundary Statement

All financial and staffing analysis in this section is conducted as a program-effectiveness lens connecting resources to student needs and outcomes. It is explicitly not a fiscal, forensic accounting, or full budget audit, consistent with the scope boundary identified in Section 6 of the RFP.

VII. Proposed Team and Level of Effort

The District will evaluate the proposed team, not ABG's broader staff capacity. ABG proposes a lean, directly-supervised team structure: Adriane Gay as Project Director and required key personnel, with Dr. William Artis and Nicole Davis proposed for engagement as independent contractor (1099) specialists upon award. Any post-award substitution of key personnel will be submitted for prior District approval as required.

Mandatory Key-Personnel Qualification

RFP Section 3 requires assignment of at least one named individual with substantial special education leadership experience. Adriane Gay satisfies this requirement directly through her sustained special education leadership background: 16+ years as a special education teacher across Washington DC, Georgia, and New Mexico (2006–2021), followed by 12+ years as a district-level special education consultant, and since 2022 as Founder & CEO of ABG SPED Consulting Inc., where she reviews and

evaluates IEPs and special education service documentation against established rubrics and delivers actionable recommendations to school districts and families — direct special education administration experience explicitly named as a qualifying category in RFP Section 7.2. Dr. William Artis's 26+ years of state education agency, school-building, and data/accountability leadership, and Nicole Davis's direct special education classroom experience, further strengthen the team's collective depth well beyond the RFP's minimum threshold.

Name / Role	Relevant Experience	Responsibilities	Est. Hours	% of Total Hours
Adriane Gay — Project Director & Key Personnel	16+ yrs special ed teaching (DC/GA/NM); 12+ yrs district-level special ed consulting; Founder/CEO, ABG SPED Consulting Inc. (IEP/service-documentation review using established rubrics)	Overall accountability, IEP-review methodology oversight, onsite observation (co-lead), final report authorship, Board presentation	~350 hrs	~45 %
Dr. William Artis — Survey/Data Lead & PM Support	26+ yrs education leadership: state education agency (MSDE), school-building leadership, curriculum/data-accountability directorship, federal grant management	Survey design, administration, disaggregation, benchmarking analysis, schedule/deliverable tracking support	~250 hrs	~30 %
Nicole Davis — Onsite Observer & Qualitative Coder	20+ yrs special education teacher (Pre-K–1st grade; resource, co-taught, inclusion settings); prior special-education focus-group experience	Building visits, structured observations, field-note documentation, focus-group note-taking and coding support	~200 hrs	~25 %

Resumes for Dr. William Artis and Nicole Davis are attached as part of this submission. Both have agreed to formalize their independent contractor engagement with ABG upon contract award.

VIII. Potential Conflicts of Interest

ABG discloses the following in response to Section VIII of the RFP submission requirements:

ABG has no past or present contractual or other relationship with Westport Public Schools, its Board of Education, or any member of its Administration, and is not aware of any other factor that would create an actual or apparent conflict of interest with respect to this review.

IX. Timeline and Project Management

ABG proposes a six-month base timeline from notice to proceed through final report and Board presentation, structured as follows:

Month	Milestones
Month 1	Kickoff meeting; finalize review questions/protocols; issue initial data/document request; begin document review; begin survey instrument development
Month 2	District review/approval of survey instruments; launch family and staff surveys; begin IEP-record sampling and reviewer calibration; begin scheduling stakeholder interviews/focus groups and onsite visits
Month 3	Survey close, reminders complete; conduct majority of stakeholder interviews/focus groups; conduct onsite building visits and observations; continue IEP-record review
Month 4	Complete IEP-record review; complete onsite visits; survey and qualitative data analysis; benchmarking analysis; interim leadership briefing on emerging themes
Month 5	Triangulation across data sources; draft findings memorandum/draft report delivered for District factual review; incorporate factual corrections without compromising independent findings
Month 6	Finalize report, executive summary, and recommendations; action-planning/leadership working session; Board of Education presentation

District Dependencies and Contingencies

- District turnaround on survey-instrument approval: assumed 5 business days; delays beyond 10 business days will shift survey launch and all downstream milestones by an equivalent number of days.
- District turnaround on data/document requests: assumed 10 business days per request.
- If family or staff survey participation falls meaningfully below target response rates by the midpoint of the open period, ABG will implement a contingency plan including an extended open period (up to 2 additional weeks), an additional reminder wave, and consultation with the District liaison on supplemental distribution channels.
- If the review extends beyond six months due to District-side delays, ABG will notify the Project Director's counterpart in writing within 5 business days of identifying the risk, along with a revised timeline and any associated schedule impact.

X. Deliverables

Deliverable	Format	Approx. Timing
Project work plan, review questions, schedule, communication & data-management plan	Word/PDF	End of Month 1
Approved family & staff survey instruments + admin/analysis plans	Word/PDF; survey platform	End of Month 2
Stakeholder engagement plan, protocols, aggregate synthesis	Word/PDF	Month 3–4
Site-visit plan, structured protocol, aggregate synthesis	Word/PDF	Month 3–4
IEP/record-review methodology, rubric, QA procedures, aggregate findings	Word/PDF	Month 4
Interim leadership briefing(s)	Slide deck + verbal	Month 4

Deliverable	Format	Approx. Timing
	briefing	
Draft final report (factual review copy)	PDF (watermarked draft)	Month 5
Final report — executive summary, methodology, findings, recommendations, appendices	Accessible PDF + editable Word	Month 6
Board of Education presentation deck + delivery	Slide deck (PowerPoint) + live presentation	Month 6
Nonproprietary data files, coding frameworks, instruments	CSV/Excel, Word	Month 6, with final report

The final report, executive summary, survey summaries, and Board presentation will be prepared in an accessible, public-facing format, consistent with the RFP's expectation that these materials will be public documents subject to legally required redactions.

XI. Data Privacy and Security

- **Data Storage/Transfer:** All District data stored on encrypted drives/cloud storage with access limited to named project team members; data transferred only via secure, encrypted channels (never unencrypted email attachments).
- **Access Controls:** Role-based access — only team members with an active need for a given dataset (e.g., IEP reviewers) receive access to that dataset.
- **Incident Response:** Any suspected data incident reported to the District liaison within 24 hours of discovery, with a written incident summary and remediation plan to follow within 5 business days.
- **De-Identification & Suppression:** Individual student and staff identifiers removed or coded prior to analysis wherever feasible; any reporting cell below the minimum group size threshold is suppressed or aggregated upward.
- **Survey Confidentiality:** Survey responses collected and reported in aggregate; no individual response will be attributable to a specific respondent in any deliverable.
- **Retention/Destruction:** All District data destroyed or returned within 90 days of contract closeout, per a written data-destruction certification to the District.
- **FERPA Compliance:** All personnel with data access will complete a FERPA-aligned confidentiality acknowledgment prior to receiving any student-level data.
- **Subcontractor Controls:** Any approved subcontractor will be bound by the same data-handling, confidentiality, and security obligations as ABG directly, memorialized in a written subcontractor agreement.

All District data will be destroyed or returned within 90 days of contract closeout, per a written data-destruction certification provided to the District.

XII. Exceptions and Assumptions

ABG identifies the following assumptions underlying this proposal. Silence on any other RFP term is intended as acceptance, subject to contract negotiation.

- The District will provide requested data/documents within the turnaround windows specified in Section IX above.
- The District will designate a single project liaison empowered to make scheduling and access decisions on the District's behalf.
- The District will distribute survey and engagement communications through District channels as described in Section 10 of the RFP.
- Onsite scheduling will be coordinated around the District's academic calendar and will avoid state testing windows where possible.
- The fee proposal submitted under separate cover assumes the scope described in this technical proposal; material scope changes negotiated post-award may affect price.
- ABG assumes that independent contractor (1099) specialists engaged directly by ABG and operating under ABG's direct supervision, insurance, and confidentiality obligations do not constitute "subcontractors" requiring separate written District approval under Section 14 of the RFP. ABG will promptly notify the District of any such engagements and provide contractor information upon request. ABG recommends confirming this interpretation in writing during the Section 13 question period (by August 21, 2026) if the District reads Section 14 differently.



ADRIANE GAY

Project Director & Key Personnel | Founder & CEO, ABG SPED Consulting Inc.

Baltimore, MD | adriane@abgspedconsulting.com | 202-740-6103

PROFESSIONAL SUMMARY

Special education leader with 16+ years as a certified special education teacher across Washington DC, Georgia, and New Mexico, and 12+ years of district-level special education consulting experience. Founder and CEO of ABG SPED Consulting Inc., a 501(c)(3) nonprofit providing special education program consulting, IEP and service-documentation review using established rubrics, and fiscal/grants compliance support to school districts and families. Brings combined programmatic and fiscal fluency — including working knowledge of EDGAR, Uniform Grants Guidance (UGG), and CFR compliance — directly relevant to the program-effectiveness and resource-analysis components of this review.

PROFESSIONAL EXPERIENCE

- *Founder & CEO — ABG SPED Consulting Inc.*

2022 – Present | Baltimore, MD

- Provides specialized consulting services to school districts, families, and organizations supporting students with disabilities in school-day and out-of-school-time settings.
- Reviews and evaluates educational program plans, IEPs, and service documentation using established criteria and rubrics, delivering actionable written recommendations.
- Oversees fiscal compliance and grant reconciliation for federally and state-funded special education programs, ensuring alignment with EDGAR, UGG, and CFR requirements; reviews and reconciles expenditure/reimbursement requests against approved budgets, identifying discrepancies and allowability issues.
- Develops corrective action plans and risk-mitigation logs to resolve fiscal compliance gaps identified during grant monitoring; tracks drawdowns, expenditures, and budget-to-actual variances across multiple concurrent federal and state grant contracts.
- Facilitates virtual training sessions and collaborative meetings with multidisciplinary teams across Georgia, Maryland, New Mexico, and Washington, DC.

- *Certified Special Education Teacher — Various School Districts*

2006 – 2021 | DC, Georgia, New Mexico

- Delivered specialized instruction to students with diverse learning needs across early childhood, elementary, middle, and secondary grade levels in multiple states and districts.
- Designed, implemented, and evaluated individualized education programs (IEPs) aligned with federal IDEA requirements and state academic standards across three jurisdictions.
- Participated in school-based team reviews, scoring, and consensus meetings to evaluate student progress and program effectiveness.
- Provided 1:1 and 2:1 student aide services for DC Public Schools.

- Contributed to school improvement initiatives targeting students in high-poverty, low-performing schools.

CERTIFICATIONS & LICENSURE

- Special Education Teaching Certification — Washington, DC
- Special Education Teaching Certification — Georgia
- Special Education Teaching Certification — New Mexico

RECOGNITION

- Recognized by Who's Who America.

RELEVANT PROJECT EXPERIENCE

- Developer of IEP Parent Empowerment Toolkit and IEP Confidence Toolkit for Families — family-facing special education advocacy resources.
- Lead consultant on multiple government contracting proposals for special education program services, including district-level fiscal analysis and program evaluation engagements.
- Founder, Empowering Special Education Leadership — professional development initiative serving special education personnel at HBCUs, TCCUs, and MSIs.

EDUCATION

- Bachelor's Degree in Education

American InterContinental University, 2006

- Master of Business Administration (MBA) in Education

University of Phoenix, 2012



DR. WILLIAM ARTIS

Senior Subject-Matter Expert — Survey/Data Lead & Project Management Support

Proposed for engagement as an independent contractor (1099) by ABG SPED Consulting Inc. upon contract award.

PROFESSIONAL SUMMARY

Education leader with over two decades of documented K-12 and state-agency leadership spanning career and technical education (CTE) administration, school-building leadership (principal/assistant principal), curriculum and instruction, data and accountability systems, and grant/contract management — preceded by direct financial contract analysis experience at IBM. This combination of state education agency leadership, ESSA/NCDPI-level accountability reporting, and formal budget/contract analysis is directly relevant to survey design, data disaggregation, benchmarking, and project-management support for this engagement.

PROFESSIONAL EXPERIENCE

- *Executive Director of Career and Technical Education — Self-employed / Youth Futures DC*

Jan 2022 – Present | Washington DC–Baltimore Area (Hybrid)

- Delivers in-person and web-based CTE professional development; manages implementation and relationship management of CTE school programming, College and Career Academies.
- Advises CTE administrators on training priorities including Career Academies, CTE standards, assessments, academic alignment, and special education service delivery within CTE contexts.

- *Director of Workforce Management & Development — Youth Futures DC*

May 2022 – Jul 2024

- Spearheaded strategic initiatives enhancing CTE programming, including curriculum development, industry-standard alignment, and access to industry-recognized credentials.
- Prepared, submitted, and managed the annual Carl Perkins federal grant, ensuring adherence to grant guidelines and reporting requirements.
- Collaborated with state agencies and post-secondary institutions on program design, articulation agreements, and dual-credit partnerships.

- *Adjunct Faculty, College Accounting — Gwinnett Technical College (Part-time)*

Jan 2015 – Apr 2025 | Lawrenceville, GA

- Taught college-level accounting covering GAAP, financial statement analysis, transactions, internal controls, and asset/liability management.

- *Director, Career and Technical Education — Maryland State Department of Education (MSDE)*

Jan 2020 – Dec 2021 | Baltimore, MD

- Provided state-level leadership and assistance to principals of 14 schools, developing and aligning CTE curriculum to graduation and career-readiness outcomes.
- Created and supported Career Centers providing students access to industry-recognized credentials (Microsoft Fundamentals, ServSafe, CPR/First Aid, and others) and community/agency reentry partnerships.

- *Director of Career Academies — Wake County Public School System*

Aug 2018 – Jan 2020 | Cary, NC

- *Director of Career and Technical Education — Hyde County School District*

Aug 2016 – Aug 2018 | Swan Quarter, NC

- Supervised all CTE program staff; directed establishment of CTE policies/procedures consistent with federal, state, and district guidelines.
- Monitored and coordinated writing of all district CTE grants; developed and managed PRC013, PRC014, and PRC017 program budgets, including vocational equipment funding compliance.

- *Director of Curriculum and Instruction — Hyde County School District*

Aug 2016 – Aug 2018 | Swan Quarter, NC

- Served as instructional specialist increasing student achievement and instructional consistency across content areas, grades K–12; member of the MTSS District Team supporting SPED and ELL intervention strategies.

- *Director of Data and Accountability — Hyde County School District*

Aug 2016 – Aug 2018 | Swan Quarter, NC

- Led district-wide data support systems to meet ESSA and NCDPI requirements; developed the annual public accountability report on student achievement and district performance outcomes.

- *Academy Director, Business and Entrepreneurship Academy — Gwinnett County Public Schools*

Jul 2013 – Aug 2016 | Lawrenceville, GA

- Served as liaison between faculty and leadership; developed business/community partnerships and experiential learning programs (job shadowing, internships, teacher externships).

- *Director, Vance Academy of Engineering — Charlotte-Mecklenburg Schools*

Jul 2012 – Jul 2013 | Charlotte, NC

- Directed the Engineering Pathway academy using Project Lead The Way (PLTW) curriculum in partnership with the National Academy Foundation.

- *Principal — Perry Street College Preparatory High School*

Jun 2011 – Jul 2012 | Washington, DC

- Led a Charter Amendment transitioning an 11-year-old school system from a Character School model to a College Preparatory model (PreK–12); directed instructional leadership, budget planning, staffing, and performance observation.

- *Assistant Principal — Durham Public Schools*

Jun 2007 – Jun 2011 | Durham, NC

- Planned, launched, and managed implementation of the district's "Turnaround Model" for high student achievement on a year-round modified schedule; used qualitative and quantitative data to drive program decisions.

- *Career and Technical Education Teacher — Durham Public Schools*

Jul 2005 – Jun 2007 | Durham, NC

- *Career and Technical Education Teacher — Edgecombe County Public Schools*

Jul 2002 – Jul 2005 | Tarboro, NC

- *Financial Contracts Analyst — IBM (Global Finance Division)*

Jan 2000 – Jun 2002 | Bethesda, MD

- Performed contract analyses ensuring alignment with negotiated parameters and government cost-control guidelines; prepared budgets, funding profiles, and variance analyses.
- Developed and monitored a cost-control system tracking contract cost/schedule baselines; produced internal and external financial reporting for sector programs.

RELEVANT EXPERTISE FOR THIS ENGAGEMENT

- State education agency (MSDE) leadership experience overseeing instructional practice and program alignment across 14 schools.
- Direct data and accountability leadership, including ESSA/NCDPI compliance and public accountability reporting — core benchmarking and disaggregation skills applicable to this review.
- School-building leadership (Principal and Assistant Principal) grounding survey and observation design in real school-operations context.
- Formal grant and contract management (Carl Perkins federal grant; IBM government contract analysis) — directly relevant to project budget tracking and fee/deliverable management support.
- K–12 curriculum and instruction leadership across five states and the District of Columbia (Maryland, North Carolina, Georgia, Washington DC).

EDUCATION

- Doctorate in Education (Ed.D.)
- Master's Degree in Education
- Bachelor's Degree in Education



NICOLE DAVIS

Onsite Observer & Qualitative Coder

Proposed for engagement as an independent contractor (1099) by ABG SPED Consulting Inc. upon contract award.

PROFESSIONAL SUMMARY

Special education teacher with direct classroom experience in Atlanta Public Schools and Clayton County Public Schools, specializing in Pre-K–1st grade instruction across resource, co-taught, and inclusion settings. Brings first-hand experience with special education service delivery, IEP implementation, and prior participation in special-education-focused focus groups conducted with school systems — directly applicable to structured onsite observation, field-note documentation, and qualitative coding of stakeholder input for this engagement.

PROFESSIONAL EXPERIENCE

- *Special Education Teacher — Clayton County Public Schools*

2020 – 2026 | Clayton County, GA

- Provided direct special education instruction and IEP service delivery to Pre-K–1st grade students in resource, co-taught, and inclusion classroom settings.

- *Special Education Teacher — Atlanta Public Schools*

2000 – 2020 | Atlanta, GA

- Provided direct special education instruction and IEP service delivery to Pre-K–1st grade students within an urban public school district for two decades.

RELEVANT EXPERTISE FOR THIS ENGAGEMENT

- Direct, first-hand special education classroom experience across resource, co-taught, and inclusion settings — provides authentic, practitioner-level judgment for observing service delivery, LRE implementation, and instructional fidelity across the settings this review must cover.
- Direct experience with IEP implementation from the classroom-teacher perspective, relevant to the IEP-record review and observation protocol.
- Prior participation in special-education-focused focus groups conducted with school systems, and familiarity with special education research methods — directly relevant to the stakeholder-engagement and qualitative-coding components of this review.
- Specialized early-childhood (Pre-K–1st grade) special education experience, supporting this review's early-identification and early-intervention analysis (Guiding Review Question 2).

CERTIFICATIONS & LICENSURE

- Georgia Special Education Teaching Certification

EDUCATION

- Master's Degree in Education

Clark Atlanta University



Westport Public Schools

#27-003-RFP

Special Education Program Review

September 1, 2026

Respectfully submitted by:

CREC Resource Group
Dana Corriveau, Ph.D.,
Managing Director for Professional Learning
123 Progress Drive
Wethersfield, CT 06109
860-329-5367
dcorriveau@crec.org

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Desi Nesmith
Executive Director
Capitol Region Education Council

September 1, 2026

Tom Scarice, Superintendent
Elio Longo, Chief Financial Officer
Westport Public Schools
110 Myrtle Ave.
Westport, CT 06880

Re: CREC Resource Group Proposal, RFP 27-003 Special Education Program Review

Dear Colleagues,

I am pleased to submit a proposal for the Westport Public Schools Special Education Program Review, RFP 27-003. Our educational services division, CREC Resource Group, has partnered with dozens of CT districts on similar special education program reviews. The feedback we routinely receive from our partners is that our review findings are meaningful and implementable. Our program reviews are crafted to pull together data points into a coherent and actionable set of recommendations.

CREC Resource Group is a division of Capitol Region Education Council (CREC), a Regional Educational Service Center (RESC) established under Connecticut General Statute 10-66 a-n. CREC celebrates its 60th anniversary this year and has grown into the largest of Connecticut's six RESCs. Although we do not propose partners or subcontractors for the RFP 27-003 scope of work, CREC currently maintains partnerships with more than one hundred entities in the region, including municipal agencies and community-based organizations. CREC's headquarters are located at 111 Charter Oak Ave., Hartford, CT 06106. CREC is not a subsidiary of any other corporation and employs 2,644 staff.

I serve as CREC's Executive Director and authorized signatory. The primary contact for this RFP is Dr. Dana Corriveau, Managing Director for Professional Learning, CREC Resource Group. There are no substantial changes from CREC's RFQ submission dated June 18, 2026. CREC accepts Westport's mandatory proposal commitments. I certify that the proposal and cost projection included herein will remain in effect for 120 days after September 1, 2026. We look forward to working with you.

Very truly yours,

Desi Nesmith
Executive Director

II. Understanding of Westport and Proposed Review Questions

Westport Public Schools is seeking an independent, system-level review of its PreK-22 special education systems and programs to evaluate service alignment, consistency, and resource efficiency. The review spans the district's broad continuum of supports across one preschool, five elementary schools, two middle schools, one high school, and a transition program. High priorities for the evaluation include administering districtwide online family and staff surveys, conducting broad onsite school observations, and engaging stakeholders across all grade levels. Strict scope boundaries prohibit the selected vendor from investigating individual student or staff disputes, rendering legal compliance rulings, or conducting full fiscal or accessibility audits. Additionally, the vendor is barred from bidding on follow-up implementation work resulting from the review unless explicitly approved by the Superintendent. Ultimately, Westport Public Schools desires evidence-based findings and prioritized, actionable recommendations to improve student outcomes and ensure service delivery in the least restrictive environment. The 10 guiding review questions for Westport's special education program review address the following:

1. Alignment and clarity of the PreK-12 continuum of services, including transition/18-22 programming.
2. Effectiveness of early intervention, MTSS/RTI, referral, evaluation, IEP development, placement, and progress monitoring.
3. Consistency and fidelity of IEP service implementation.
4. Support for the least restrictive environment (LRE), inclusion, and access to academic and nonacademic experiences.
5. Patterns in academic, behavioral, social/emotional, graduation, and transition outcomes.
6. Achievement and growth gaps over time, including grade-level progress measures and family reporting.
7. Stakeholder experiences across groups, including experiences during disagreements.
8. Factors contributing to outplacement and opportunities to strengthen in-district capacity.
9. Alignment and cost-effectiveness of staffing, professional learning, time, and financial resources.
10. Actionable, prioritized short-, medium-, and long-term recommendations.

These questions systematically connect student needs and services by evaluating whether early intervention, evaluation, and IEP practices accurately identify student needs and deliver appropriate supports. Westport Public Schools connects service delivery to LRE by assessing how effectively inclusion, co-teaching, and continuum options maintain access to grade-level instruction and nonacademic opportunities while reducing unnecessary outplacements. Experiences and outcomes are tied together by analyzing stakeholder feedback alongside academic, social-emotional, and postsecondary progress patterns to see how system perceptions reflect actual student growth and achievement gaps. Finally, the framework bridges

resources across the system by examining whether spending, staffing models, caseloads, and professional learning are directly aligned to drive meaningful long-term student results.

III. Detailed Methodology and Work Plan

During the 2026–27 school year, CREC Resource Group will conduct a comprehensive, mixed-methods special education program review for Westport Public Schools covering PreK–22 students with disabilities, utilizing qualitative and quantitative data through a framework of collaborative planning, data collection, synthesis, and final reporting aligned with research questions.

To evaluate Westport Public Schools' special education system, CREC Resource Group has updated the domains in its initial RFQ framework to provide a more targeted scope based on the RFP's priorities. This revised structure more accurately aligns all qualitative and quantitative data collection with the district's specific guiding questions and required deliverables.

Table 1: *Framework*

Domain	Quality Indicators will
Domain 1: Resource Efficiency & Alignment - We analyze and assess the utilization of the district's special education budget, caseload management, and building-level staff scheduling. This ensures that Westport optimizes its fiscal and human capital to target student needs effectively.	- Assess the quality of the program(s) and services - Use evidence to create and/or fine-tune an action plan reflective of today's best practices and landscape in special education - Determine priority need areas - Describe proposed goals and activities to change practices and meet/exceed improvement targets for both educators and students with disabilities
Domain 2: Structural Integrity & Compliance- We evaluate Westport Public School's special education policies, procedures, and practices. This includes evaluating compliance timelines, referral practices, and evaluating how Westport's Multi-Tiered System of Support (MTSS) prevents or contributes to over-identification. This will highlight Westport's programming aligned with district goals and best practices.	
Domain 3: Educational Benefit & Progress- We perform rigorous individual student and artifact reviews through an educational benefit rubric, file review, and observations. This confirms whether student IEPs are reasonably	

Domain	Quality Indicators will
calculated to facilitate growth and measure measurable gains across demographics and can identify areas to improve student outcomes. Compliance is also reviewed in this objective.	

Project Initiation, Governance, and Management

CREC Resource Group will convene an initial meeting with Westport Public Schools leadership to introduce the Project Director and Manager, define data-sharing protocols, clarify project roles, and establish confidentiality standards. In addition, CREC Resource Group will review the project management plan, identifying milestones, timelines, responsible parties, decision points, risk and mitigation strategies, and communication updates. We will also review a targeted document and data request and establish which channels will be used to request additional data as needs arise. All efforts will be made to minimize burden on staff, students, and families while preserving the integrity, breadth, and independence of the review.

Document, IEP, Data, Benchmarking, and Resource Analysis

To evaluate system patterns, CREC Resource Group will conduct a multi-faceted district document review, student record review, data analysis, and resource analysis. This will include core district guidelines, policies, MTSS/RTI structures, caseloads, and professional learning materials, alongside aggregate dataset trends covering identification rates, LRE placements, achievement growth gaps, outplacements, and graduation outcomes. Using a validated rubric that evaluates alignment among present levels of performance, goals/objectives, services, accommodations/modifications, placement, and progress monitoring, scoring will indicate whether the IEP is designed to reasonably provide an educational benefit.

Additionally, we will analyze special education spending patterns, staffing models, and outplacement costs to determine resource efficiency, while benchmarking key performance indicators against Connecticut state standards using publicly available state and district Annual Performance Report (APR), District Reference Group (DRG) metrics, and comparable district data. Data points for comparison would include the latest total student population and special education prevalence, overall and special education expenditures, time with non-disabled peers (TWNDP) and out-of-district placement rate, achievement data, and graduation data. Limitations to comparison districts include those where the student count (N size) is too small for public reporting or where data are not publicly available.

Student IEPs chosen for the review will come from a multivariate stratified random sample. We will request a spreadsheet from the district that includes the students' SASID ID number, program, disability category, and placement type with student names and unique identifiers removed to

maintain FERPA compliance. We utilize Gemini AI with prompting to create the sample. Once student IEPs have been identified, we will either request direct access to the district's CT-SEDs system to conduct the analysis without creating additional burden to the district, or request copies of the students' IEPs in PDF format going back to the student's last comprehensive evaluation and subsequent IEPs.

Although all reviewers have conducted and been trained in the rubric and process previously, to ensure all reviewers score IEPs consistently using the rubric, CREC Resource Group conducts an inter-rater reliability refresher and training before analyzing student records for any program review. Using anonymized sample IEPs, all team members independently review and score the same IEPs using the validated rubric. The team then compares individual scores item-by-item to identify discrepancies, clarify criteria, and align scoring logic. We then calculate percentage agreement of inter-rater reliability across reviewers. Any reviewer or item below 85% scoring agreement repeats calibration scoring until consistency is established.

Once the district's IEP review is completed, results are compiled via an aggregate score in each of the rubric categories with descriptors for areas of strength and areas for improvement. Although results are shared in the final program review report, data specific to the IEP review can be shared with the district upon completion. The results shared contain no identifiable student information. Attention is drawn to associations and correlations where possible. Because district program reviews involve many variables and are not designed as experimental research, we avoid making causal claims since cause and effect cannot be directly isolated.

Family and Staff Online Surveys and Stakeholder Engagement

Recognizing stakeholder engagement as a core priority of the evaluation, CREC Resource Group will design, deploy, and analyze districtwide online surveys for all families of students with disabilities (PreK–22) and all staff involved in their education and care. These online surveys will evaluate perceptions of key operational domains including communication, IEP/PPT processes, IEP effectiveness and fidelity, access to supports including mental health and behavioral, inclusive practices, transition pathways, access to academic and nonacademic opportunities, and overall satisfaction with Westport Public Schools' special education programming.

We use a structured, deductive coding system for open-ended online survey responses and interview responses. To triangulate data, our team will facilitate focus groups and interviews with district leaders, administrators, teachers, service providers, paraeducators, families, and approved students. We will use standardized engagement protocols for focus groups and representative sampling to capture perspectives across grade levels, program model, disability profile, and service intensity. Through the triangulation of stakeholder feedback with quantitative metrics and policy analyses, we will distinguish isolated incidents from verified, system-wide patterns. We will consistently and frequently articulate that our role is not to investigate individual complaints. We will develop a communication plan for targeted response rate strategies and ensure accessible formats for participation. Reporting will include data disaggregated by school

level, staff role, and years of experience, where enough participants are available to avoid confidentiality violations or identification.

Onsite School Visits and Classroom/Program Observations

To evaluate classroom instruction and program implementation firsthand, CREC Resource Group will conduct structured onsite observations across all Westport school buildings, encompassing preschool, elementary, middle, high school, and secondary transition settings, including extracurricular and nonacademic settings. A rubric aligned with RFP focus areas and a validated observation tool will be utilized. Over a cumulative nine-day site visit, all six evaluation team members will deploy standardized, calibrated observation protocols to observe inclusive, co-taught, resource, and specialized learning environments. Observers will collect data on the delivery of specially designed instruction and instructional supports, grade-level curriculum access, student engagement and independence, accommodation fidelity, and general classroom culture with a focus on inclusion. Grade bands and program types will aggregate findings to highlight districtwide instructional trends and strengths while maintaining staff and student anonymity. Observations consist of one component of the data collection system that gets triangulated with other data sources such as online surveys, focus groups, IEP reviews, and document review.

All six team members have conducted classroom observations using calibrated observation protocols and engage with ongoing training to ensure bias is minimized and reliability is maintained. Documentation is maintained using an online Google Form and spreadsheet system. Schedules for observations can be organized in cooperation with district and school leadership to ensure minimum disruption and maintain confidentiality.

Continuum, LRE, Service Delivery, Access, and Outcomes

To evaluate Westport's continuum of services, LRE access, and student outcomes, CREC Resource Group will synthesize insights across data sources collected throughout the review, including IEP file reviews, document reviews, online survey responses, focus group perspectives, and classroom observation metrics. This analysis will examine referral pathways, Child Find practices, and placement decisions to determine whether students receive appropriate supports in the least restrictive environment. Furthermore, our team will evaluate student access to general education curricula, electives, and extracurricular opportunities, alongside key transition points from early childhood through postsecondary 18–22 pathways. By triangulating these multi-source qualitative and quantitative data, we will map trends, identify gaps, and provide insight into the overall effectiveness of the district's special education continuum.

Findings, Recommendations, Reporting, and Initial Action Planning

Throughout the review, our Project Director will provide updates to district leadership on emerging themes, challenges that have surfaced, and provide an opportunity to answer

questions. Draft findings will be provided to district leadership for factual review and contextual clarification without influencing findings or recommendations. To establish a clear roadmap for system improvement, CREC Resource Group will synthesize quantitative and qualitative data and insights, document findings, and observation data into a comprehensive final report. This deliverable will feature an executive summary, direct findings across all key RFP domains with a basis for the findings grounded in the review, and prioritized, evidence-based recommendations aligned with district goals and Connecticut state standards. Recommendations aligned with findings will be organized with attention to priority, implementation timeline, resource needs, and measures of progress. Findings will be presented to the Westport Board of Education with the final report, executive summary, and online survey summaries publicly available and accessible. CREC Resource Group will conduct a planning session with district-identified leadership and staff to bridge the findings and recommendations into actionable steps and strategies.

IV. Family and Staff Online Survey and Stakeholder Engagement Plan

Our approach combines districtwide online surveys with structured focus groups and interviews to evaluate key programmatic domains. CREC Resource Group will deploy online surveys tailored to two primary stakeholder groups: all families of PreK–22 students receiving special education or 504 services, and all general education teachers, special educators, related service providers, paraeducators, and administrators districtwide. The online survey will be accessed via a link or QR code to an electronic Google Form. We will coordinate with district leadership to identify multiple languages and accessibility options needed. A communication plan will include direct email invitations, reminder broadcasts on parent portals, and printed flyers and announcements. Analysis of non-response bias will assist with targeted communications. Online survey questions will be designed around the key RFP domains with an option for open-ended responses that will be analyzed using deductive coding aligned with RFP evaluation domains, combined with inductive coding to capture emerging, unexpected themes across stakeholder feedback. Survey results will be cross-tabulated across key variables including grade levels, programs, disability categories, program types, and race/ethnicity. Variables that do not have a minimum of 10 respondents will not be publicly reported but can be aggregated into other variables to create a larger group of respondents for public reporting.

CREC Resource Group will structure family focus groups into targeted cohorts segmented by grade bands, including early childhood, elementary, middle, high school, and 18 - 22 transition, as well as placement models ranging from co-taught general education settings to specialized in-district and outplaced programs. These sessions will examine family-school communication, PPT participation, progress reporting clarity, vertical transitions, and overall trust in district services. To mirror the online survey's accessibility and capture a representative sample across all demographics, family sessions can be offered with in-person and virtual options. CREC Resource Group will work with district leadership to determine accessibility needs, including language

translation services. Focus groups are limited to 12 participants, with sessions being recorded for later coding.

Within each cohort, participants will be selected based on a random sample from a district-provided list of parents of students with IEPs and 504 plans with variables of grade, placement/program setting, and disability category listed.

An observation, complaint, or feedback point is never classified as a system-level pattern based on a single data source alone. A theme is only confirmed as systemic when it is corroborated across at least three distinct data collection streams. Additionally, data is disaggregated across variables such as grade band, placement/program type, disability category, and race/ethnicity to ensure a vocal majority does not skew overall findings.

V. Site Visit and Observation Plan

The observation plan is largely driven by the school calendar, team member availability, and known activity in the schools that are ideal for observations. We propose six team members listed in **Section VII. Proposed Team and Level of Effort** of this RFP response will conduct on-site observations across nine school days between December and March 2027 in accordance with the school calendar and scheduled in agreement with school and district leadership. Once dates are identified, we will request a schedule of all academic service delivery settings in a building, including self-contained settings, resource rooms, inclusive classrooms, co-teaching, and paraeducator support. We will also request any opportunities during the scheduled day to observe non-academic activities such as clubs, community outings, or activity periods where students with disabilities participate. Observations are typically conducted for up to 30 minutes; however, they can be extended based on the observer's discretion. Observations are not evaluations of teachers' performance and cannot be used as any component of the district's teacher evaluation system. All six team members have conducted classroom observations using calibrated observation protocols and engage with ongoing training to ensure bias is minimized and reliability is maintained. Documentation is maintained using an online Google Form and spreadsheet system. Reporting will be organized by school level, placement setting, and disability across domains in the rubric aligned with RFP focus areas and a validated observation tool while maintaining confidentiality.

VI. Data, IEP, Benchmarking, and Resource Analysis Plan

Datasets & Documents Requested: Core policy and procedure documents, guidelines, Multi-Tiered System of Support (MTSS) frameworks, MTSS enrollment and progress monitoring data, caseload/workload grids, professional learning plan and/or offerings FY26 and FY27, special education expenses FY25 and FY26, approved special education budget FY27, special education and related services staff listing FY27, total enrollment PreK - 22, special education

prevalence PreK-22, special education student listing by SASID ID #, referral/evaluation patterns, outplacement rates, graduation rates, and time spent with non-disabled peers (TWNDP).

Analytic Approach & Disaggregation: Aggregate trends and patterns will be evaluated and disaggregated by school level (PreK–22), program model, disability category, placement type, and race/ethnicity where privacy thresholds (N > 10 for disaggregated cells, N > 30 for broad groups) permit. Data checks will distinguish correlation and association without asserting unsupported causal claims.

IEP & Student Record Sampling: A multivariate stratified random sample will be generated via Gemini AI and will pull de-identified SASID spreadsheets from the district. IEP analysis will occur via direct access to the district's CT-SEDS system or PDF transfers of comprehensive evaluations and subsequent IEPs. IEP reviews rely on a validated rubric examining alignment among present levels of performance, student needs, goals/objectives, services, accommodations/modifications, placement, progress monitoring, and educational benefit. Inter-rater reliability calibration ensures team consistency, requiring an 85% scoring agreement threshold.

Benchmarking: Core indicators such as prevalence rates, expenditures, TWNDP, out-of-district placement rates, achievement, and graduation will be benchmarked against Connecticut state standards, District Reference Group (DRG) metrics, and comparable districts using publicly available State Department of Education (CSDE) and Annual Performance Report (APR) data.

Staffing, Resource, Outplacement & Cost-Effectiveness: System-level staffing efficiency, caseload management, building schedules, spending patterns, and outplacement expenditure trends will be evaluated to determine how effectively fiscal and human capital are aligned to student needs, LRE maintenance, and service delivery.

Analysis of Achievement and Growth Gaps, Grade-Level Progress, and Family Reporting

Analysis will examine academic performance and growth trends over time comparing students with disabilities to non-disabled peers across state and district measures. The review will evaluate specific measures Westport Public Schools uses to determine grade-level curriculum access, mastery, and progress monitoring. Family reporting practices will be evaluated to determine how clearly progress is communicated to parents and guardians.

Program-Effectiveness Focus vs. Fiscal/Legal Compliance Review

The evaluation functions strictly as a system-level program-effectiveness review focused on service alignment, educational benefit, LRE support, and practical recommendations. Evaluators are prohibited from conducting full fiscal, forensic accounting, or budget audits, nor will they perform full ADA/facilities accessibility audits. Evaluators will not render legal compliance rulings, issue opinions on statutory violations (e.g., IDEA, Section 504, ADA, FERPA), or investigate

individual student/staff disputes. Spending and resource allocation are examined strictly to evaluate structural alignment and overall cost-effectiveness in supporting student outcomes.

VII. Proposed Team and Level of Effort

All team members are mandated reporters and have completed all state-required public school training for educators. CREC Resource Group abides by district policies for student and data confidentiality, as well as FERPA and HIPPA requirements.



Dana Corriveau, Ph.D.

Managing Director for Professional Learning

Dr. Corriveau serves as the Project Director and subject matter expert for special education program reviews. She will be involved in all aspects of the review, including communication with district leadership, collecting and analyzing data from all data sources, report writing, presentation to the Board of Education, and follow-up action planning session, all comprising 39% of project effort or 22 days. Although Dr. Corriveau leads many initiatives at CREC Resource Group, her availability is readily available for email, virtual meetings, phone communication, and more limited for on-site obligations without prior notice. Throughout her career, Dr. Corriveau has demonstrated an unwavering commitment to education, systems improvements, and working with students with disabilities. She began her career as a special education teacher in Connecticut and Massachusetts, and in 2006, she joined the Connecticut State Department of Education as an Education Consultant in the Bureau of Special Education. Dana also brings with her over 11 years of experience as a Director of Student Services for North Haven Public Schools and Region 10 Public Schools, where she led initiatives affecting all students and adults, such as focused monitoring and general supervision, equity, social-emotional wellness, literacy, meaningful inclusion, and tiered support systems. She holds a B.S. in Elementary and Special Education from the University of Hartford, an M.Ed. in Special Education from Cambridge College, and a Ph.D. in Leadership Studies from the University of the Cumberlands. She has certification in Connecticut for Comprehensive Special Education (265) and Intermediate Administration and Supervision (092).

Nicole Natale, M.S., CCC-SLP, A.T.P.

Senior Education Specialist

Nicole Natale serves as the project manager and a subject matter expert. Ms. Natale will be involved in organizing team activities, accountability to the project calendar, collecting and analyzing data, support with report writing, and support with the presentation to the Board of Education, comprising 25% of project effort or 14 days. Ms. Natale leads multiple projects at CREC Resource Group, and her availability is readily available for email, virtual meetings, phone communication, and more limited for on-site obligations



without prior notice. Nicole joined CREC in 2007 and leads CREC's work in assistive technology (AT) and special education. With over 20 years as a speech-language pathologist and assistive technology practitioner, Nicole has focused her work with school districts on building the capacity of teams in providing AT supports and services to students with disabilities. She also provides professional development, technical assistance, and training on a variety of topics regarding AT, inclusion, and adaptations for students with disabilities and Universal Design for Learning. She completes evaluations for students who require AT to access the general education curriculum, as well as for students who require augmentative and alternative communication (AAC). Nicole also uses her expertise to conduct program reviews of district special education programming to effect change for students with disabilities. In addition to this varied background, Nicole has also co-authored a number of publications, including "The Assistive Technology Guide for Maximizing Learning for Students with Autism" and "The Blueprint: Building Powerful Special Education Practices." Nicole earned her Bachelor of Arts degree from the University of Connecticut and her Master's degree in Communication Sciences and Disorders from the Pennsylvania State University. She is certified by the American Speech-Language and Hearing Association with her Certificate of Clinical Competency, has a State of Connecticut Department of Education Speech-Language Pathology certification, and has her Assistive Technology Professional Certification from the Rehabilitation Engineering and Assistive Technology Society of North America. Nicole also holds an Intermediate Administration or Supervision certification from the State of CT.



Claudia Provenzano
Lead Education Specialist

Claudia Provenzano serves as a subject matter expert. Ms. Provenzano will be involved in IEP reviews, classroom observations, focus interviews, and document review. This will comprise 11% of project effort or six days. Ms. Provenzano leads multiple projects at CREC Resource Group, and her availability is readily available for email, virtual meetings, phone communication, and more limited for on-site obligations without prior notice. Claudia joined

CREC in 2017 after earning her undergraduate and graduate degrees from Manhattanville University and spending 17 years teaching in both general and special education. As Lead Education Specialist for the Advanced Alternate Route to Special Education (AARC), she leads program implementation, mentors and supports teacher candidates as they work toward cross-endorsement certification. She partners with districts to strengthen Multi-Tiered Systems of Support, Social-Emotional Learning, and autism programming. Passionate about educator well-being, Claudia also leads trainings on self-care, stress management, and mindfulness to promote positive school climates for students and staff alike. As the RESC representative for Secondary Transition, Claudia serves on the CT Transition Task Force, the Transition Steering Committee, and is a Charting the LifeCourse ambassador. She guides districts in person-centered planning, transition evaluations, and program development. Her statewide contributions include co-creating the CSDE Customized Employment course, Secondary Transition Coordinator

training, and Paraeducator training. Claudia is currently enrolled in the Educational Leadership doctorate program at Sacred Heart University.

EJ Piccirillo

Education Specialist

EJ Piccirillo serves as a subject matter expert. Ms. Piccirillo will be involved in IEP reviews, classroom observations, focus interviews, and document review. This will comprise 11% of project effort or six days. Ms. Piccirillo leads multiple projects at CREC Resource Group, and her availability is readily available for email, virtual meetings, phone communication, and more limited for on-site obligations without prior notice. Ms. Piccirillo brings Connecticut-specific expertise in special education, assistive technology (AT), augmentative and alternative communication (AAC), autism spectrum disorders, reading/literacy disorders, and early childhood intervention across district settings. As an Education Specialist with CREC and a former district Speech and Language Pathologist in Naugatuck Public Schools, EJ leads systems-level planning, technical assistance, and capacity-building efforts for PreK–12 multidisciplinary teams and families across Connecticut. Her work focuses on evaluating communication access, supporting early childhood language and literacy foundations, and integrating high-quality AT/AAC frameworks into everyday instructional environments. EJ holds a Master of Science in Speech and Language Pathology from Southern Connecticut State University, maintains an ASHA Certificate of Clinical Competence, and possesses Connecticut Provisional Educator Certification (061) alongside State Department of Public Health licensure. *(New résumé; included in Appendix A)*



Jenifer Tuller

Education Specialist

Jenifer Tuller serves as the subject matter expert for MTSS/RTI processes and outcomes. She will be involved in document review, IEP review, data analysis, and report writing as it pertains to the district's MTSS system. This will comprise 9% of project effort or five days. Ms. Tuller's availability is readily available for email, virtual meetings, and phone communication, and is limited for on-site obligations. With over 25 years of experience in special education and intervention in Connecticut's public schools, Jenifer Tuller is a trusted partner for schools and organizations seeking meaningful, measurable improvement in student outcomes. As an Education Specialist with CREC Resource Group, she brings a proven track record of helping educators translate research into practice through high-impact professional learning, coaching, and system-level support. Jenifer combines deep expertise with practical application, supporting districts in strengthening instruction incorporating Universal Design for Learning, building effective Multi-Tiered Systems of Support (MTSS), implementing restorative practices, and improving outcomes for students with diverse learning needs. Her work is grounded in implementation science and focused on results, ensuring that strategies are not only evidence-based but sustainable in real-world settings. Jenifer holds a Master's Degree in

Special Education and has completed advanced graduate coursework in Remedial Reading. She is currently pursuing her Doctorate of Education in Reading and Literacy, further deepening her expertise in evidence-based literacy practices.

Alison Cianciolo
Education Specialist

Alison Cianciolo serves as a subject matter expert for special education compliance, inclusive practices, and speech-language. She will be involved in IEP reviews, observations, and focus group interviews. This will comprise 7% of project effort or four days. Ms. Cianciolo's availability is readily accessible for email, virtual meetings, and phone communication, and flexible for on-site obligations. With over 30 years of experience in special education and speech-language pathology across Connecticut public schools, Ms. Cianciolo is a trusted partner for school districts seeking meaningful, measurable improvement in student outcomes and systemic capacity building. Ms. Cianciolo brings a track record of helping educators translate research into daily practice through high-impact professional learning, instructional coaching, and system-level technical assistance. Alison combines clinical expertise with practical application, supporting districts in building effective models for inclusive and LRE practices for all students, strengthening transition programming, implementing Universal Design for Learning (UDL), and guiding teams through CTSEDs and IEP quality processes. In addition to her regional leadership overseeing statewide paraeducator initiatives and COMPASS curriculum standards, she has served as an Adjunct Professor at Charter Oak State College, instructing candidates in speech-language pathology standards and clinical practice. Her extensive background spans roles as a Speech-Language Pathologist, PPT Chairperson, and Special Education Data Team Leader across CREC Magnet Schools, Bloomfield, Hartford, and Waterbury Public Schools throughout her career. Ms. Cianciolo's work is grounded in evidence-based implementation, ensuring that instructional, behavioral, and communication strategies are sustainable in real-world school settings. Alison holds a Master of Arts in Speech and Language Pathology from Kean College and a Bachelor of Science in Speech Pathology from East Stroudsburg University. She remains actively engaged in state and national leadership as a member of the American Speech-Language-Hearing Association (ASHA), the Association for Supervision and Curriculum Development (ASCD), and the Connecticut Paraprofessional Advisory Council. *(New résumé; included in Appendix A)*



VIII. Potential Conflicts of Interest

CREC Resource Group has not identified any conflicts of interest. During the past five (5) years, CREC Resource Group has partnered with Westport to provide the following services:

- Educational Audiology--CREC Soundbridge provided audiology support to two (2) students
 - 2023-24, up to four (4) hours, \$920

- 2024-25, up to seven (7) hours, \$1,610
- Advanced Alternate Route to Certification (AARC)-- one (1) Westport teacher is currently enrolled in CREC's AARC special education cross-endorsement program

IX. Timeline and Project Management

Table 2: CREC Resource Group Work Plan by Phase

Phase & Timeline	Key Focus and Major Milestones	Core Dependencies	Communication	Risk Management & Mitigation	Quality Control Checks
Phase 1: Nov 2026	● 1.1 Project Kickoff: Finalize communication and data protocols. ● 1.2 Online Survey Launch: Deploy districtwide PreK–22 family and staff survey. ● 1.4 Sampling: Generate multivariate stratified random sample for IEP review and focus groups. ● 1.5 District calendar coordination (accounting for winter breaks/testing)	● District delivery of de-identified SASID student list. ● CT-SEDS system access or PDF file transfer.	Weekly check-ins between Project Director (Dr. Corriveau) and District Leadership.	Risk: Delays in CT-SEDS system permissions. Mitigation: Utilize secure cloud folders; start document review immediately.	Non-response bias check at Day 14 of survey window.
Phase 2: Dec 2026	● 2.1 IEP Review: Complete scoring of selected IEPs	● Focus group opt-in parent groups. ● School building	Bi-weekly executive updates to Superintendent.	Risk: Low focus group turnout or skewed parent representation.	● Ensure coding alignment with RFP domains.

Phase & Timeline	Key Focus and Major Milestones	Core Dependencies	Communication	Risk Management & Mitigation	Quality Control Checks
	using validated rubrics. ● 2.2 Online Survey Close: Close window; run non-response bias and cell suppression. ● 2.3 Focus Groups: Conduct qualitative sessions with staff, parents, and students. ● 2.4 Observation Schedule: Finalize 8-day site visit schedule across schools and programs	schedule alignment to avoid class disruption.		Mitigation: Offer virtual/in-person, morning/evening options.	● FERPA compliance check—de-identify all transcripts and notes.
Phase 3: <i>Jan – Feb 2027</i>	● 3.1 Onsite Visits: Deploy 5 team members across 8 observation days. ● 3.2 Resource Analysis: Complete financial, staffing, and CSDE/DRG benchmarking. ● 3.3 Triangulation: Cross-analyze survey, IEP,	District calendar coordination (accounting for winter breaks/testing).	Weekly leadership check-ins.	Risk: Winter weather delays interrupting observation schedule. Mitigation: Extend timeline proportionally	Require corroboration across ≥ 3 independent data streams for systemic findings.

Phase & Timeline	Key Focus and Major Milestones	Core Dependencies	Communication	Risk Management & Mitigation	Quality Control Checks
	observation, and focus group data. ● 3.4 Emerging Themes: Brief leadership on preliminary patterns.				
Phase 4: <i>Mar 2027</i>	● 4.1 Comprehensive Draft: Synthesize findings and prioritized recommendations. ● 4.2 Factual Review: Submit confidential draft report to leadership. ● 4.3 Report Refinement: Incorporate district factual feedback.	Timely district leadership review (10-business-day window).	Bi-weekly progress updates; formal draft review presentation with Superintendent.	Risk: Disagreements on factual interpretation or context. Mitigation: Hold structured clarification workshop while preserving third-party independence	Verify report adheres strictly to scope (no legal/individual dispute rulings).
Phase 5: <i>Apr 2027</i>	● 5.1 Final Deliverable: Submit final public report and executive summary. ● 5.2 BOE Presentation: Present findings at	Public Board of Education meeting schedule.	Final project debrief and presentation coordination meetings.	Risk: Public confusion over complex metrics or suppressed small N data cells. Mitigation: Provide clean, visually accessible executive	Verify Section 508 web accessibility and FERPA N < 10 suppression rules.

Phase & Timeline	Key Focus and Major Milestones	Core Dependencies	Communication	Risk Management & Mitigation	Quality Control Checks
	public Board of Education meeting. ● 5.3 Action Planning: Lead leadership workshop to bridge report into action steps.			summaries and data guides.	

X. Deliverables

All aggregate findings and synthesis as presented in the final report are property of Westport Public Schools; usage rights to be granted with permission from district leadership.

1. Final project work plan, review questions, schedule, communication plan, data request, and confidentiality/data-management plan.

Format: Google Doc/PDF
Timing: November 2026
Lead Personnel: Dana Corriveau & Nicole Natale
Proprietary: NO
District usage rights: Must cite “CREC Resource Group, November 2026”

2. Approved family and staff survey instruments, administration and response-rate plans, analysis plans.

Format: Google Doc/PDF
Timing: November 2026
Lead Personnel: Dana Corriveau & Nicole Natale
Proprietary: YES
District usage rights: Confidential, usage only with permission from CREC

3. Stakeholder engagement plan, sampling rationale, protocols.

Format: Google Doc/PDF
Timing: November/December 2026
Lead Personnel: Dana Corriveau & Nicole Natale
Proprietary: YES
District usage rights: Confidential, usage only with permission from CREC

4. Site-visit and observation plan, structured protocol, sampling rationale.

Format: Google Doc/PDF
Timing: November/December 2026
Lead Personnel: Dana Corriveau & Nicole Natale
Proprietary: YES
District usage rights: Confidential, usage only with permission from CREC

5. IEP/record-review methodology, rubric/protocol, quality assurance procedures.

Format: Google Doc/PDF
Timing: November/December 2026
Lead Personnel: Dana Corriveau & Nicole Natale
Proprietary: YES
District usage rights: Confidential, usage only with permission from CREC

6. Interim leadership briefing(s) and preliminary findings presentation or memorandum.

Format: Google Doc/PDF
Timing: Weekly, biweekly
Lead Personnel: Dana Corriveau & Nicole Natale
Proprietary: YES
District usage rights: With permission from CREC or district leadership

7. Draft final report for factual review.

Format: Google Doc/PDF
Timing: March 2027
Lead Personnel: Dana Corriveau & Nicole Natale
Proprietary: NO
District usage rights: With permission from district leadership

8. Final report in accessible PDF and editable format, including executive summary, methodology, data sources, findings, strengths, recommendations, limitations, and appendices.

Format: Accessible Digital PDFs
Timing: April 2027
Lead Personnel: Dana Corriveau
Proprietary: NO
District usage rights: With permission from district leadership

9. Board of Education presentation deck and presentation.

Format: Slide Deck Presentation/PDF
Timing: April 2027
Lead Personnel: Dana Corriveau
Proprietary: NO
District usage rights: With permission from district leadership

10. All nonproprietary project data files, coding frameworks, and instruments created specifically for the District, subject to contract terms and privacy requirements.

Format: Google Doc/PDF
Timing: April 2027
Lead Personnel: Dana Corriveau
Proprietary: NO
District usage rights: With permission from district leadership

XI. Data Privacy and Security

CREC Resource Group maintains stringent technical, administrative, and physical safeguards to ensure full compliance with the Family Educational Rights and Privacy Act (FERPA), the Health Insurance Portability and Accountability Act (HIPAA), and Connecticut state data privacy laws.

Data Storage, Transfer, and Infrastructure Security

All project files, documents, and analytical materials are housed on CREC's secure internal servers protected by enterprise-grade security protocols. Team members access project tools, including Google Chrome productivity tools and Google Forms, via strictly authenticated sessions requiring Multi-Factor Authentication (MFA). Furthermore, all electronic data transfers, including file uploads and CT-SEDS or PDF record transmissions, occur over secure, encrypted channels utilizing AES 256-bit encryption at rest and TLS 1.3 in transit.

Access Controls and Role-Based Permissions

Access to project directories, data files, and raw online survey responses is strictly limited on a need-to-know basis and governed under the authority of the Project Director, Dr. Dana Corriveau. File and document access permissions are restricted exclusively to authorized team members granted explicit permission. Assigned personnel receive role-based access rights aligned directly to their specific evaluation duties, which prevents unauthorized internal or external data exposure.

De-Identification, Suppression, and Confidentiality

Student records are fully de-identified before analysis by scrubbing personally identifiable information (PII) and replacing student names and addresses with State Assigned Student Identifier (SASID) numbers. Educator names are similarly removed from observation forms and qualitative notes, replaced instead with generic labeling. To safeguard individual confidentiality, public reporting enforces strict sample size thresholds of $N \geq 10$ for disaggregated subgroups and $N \geq 30$ for broad group totals, automatically suppressing or combining any subgroup cell with fewer than 10 respondents. Additionally, districtwide family and staff online surveys are administered anonymously via web-based Google Forms without collecting IP addresses, and qualitative comments undergo thorough de-identification checks before analysis.

Data Retention, Destruction, and Subcontractor Controls

All raw project data, notes, and de-identified files are securely archived in CREC's encrypted storage for the duration required by contract and state policy before undergoing permanent destruction using DoD-compliant digital wiping protocols. CREC Resource Group executes all evaluation activities, data analyses, site visits, and reporting using internal, vetted CREC personnel without relying on any third-party vendors or subcontractors.

Incident Response & Data-Sharing Agreement Experience

To protect district interests, CREC relies on a dedicated IT Security Team that operates under a rapid-response protocol. In the unlikely event of a potential security issue, the Superintendent will be notified within 24 hours while technical teams immediately secure the system and investigate. Furthermore, CREC routinely partners with Connecticut school districts and state agencies under legal frameworks, such as Data-Sharing and Privacy Agreements with districts providing access to CREC in their CT-SEDS system for program reviews. This guarantees that Westport Public

Schools retains full ownership of its data, and all student privacy rights under FERPA are upheld throughout the evaluation.

XII. Exceptions and Assumptions

No exceptions or exclusions are requested. CREC accepts all RFP terms subject to contract negotiation.

XIII. Appendix A - Additional CREC Resource Group Résumés

EDNA-JO PICCIRILLO



CONTACT

- 📞 (203) 725-6584
- 📍 123 Progress Drive
- ✉️ epiccirillo@crec.org
- 🌐 www.crec.org

ABOUT ME

I am a speech language pathologist and assistive technology (AT) specialist with a deep commitment to equitable access. My work blends broad AT expertise with a specialized focus on augmentative and alternative communication (AAC), implementation science, and coaching to help families, educators, and districts build sustainable, meaningful change. I believe in collaborative problem solving, context-responsive solutions, and empowering educators to confidently support AT and AAC users across environments.

EDUCATION

SOUTHERN CONNECTICUT STATE UNIVERSITY

Master of Science
Speech and Language Pathology
May 2015

Bachelor of Science
Communication Disorders
December 2012

SKILLS

- AT and AAC expertise
- Literacy and language
- Equitable and cultural responsiveness
- Adult learning theory
- Implementation science application
- Data informed decision making
- Systems level planning
- Professional learning design
- Context-responsive problem solving

CERTIFICATION

ASHA Certificate of Clinical Competence
valid through December 2026

CT Provisional Educator Certification (061)
valid through August 2026

CT Department of Public Health license
valid through May 2026

WORK EXPERIENCE

• EDUCATION SPECIALIST

Capitol Region Education Council (2020-present)

I lead AT and AAC implementation efforts across Connecticut school districts, working in partnership with educators, administrators, families, and multidisciplinary teams to strengthen communication access for students with complex needs. My work blends technical expertise with implementation science to design systems that are sustainable, responsive to context, and grounded in equitable practice. I collaborate closely with teams to assess needs, identify barriers, and develop cohesive AT and AAC plans that integrate seamlessly into instructional environments. Through coaching, professional learning, and data-informed decision making, I help educators build confidence, refine their practice, and adopt high-quality communication supports that endure beyond individual sessions. My commitment is to create environments where AT and AAC are not isolated interventions, but integral components of meaningful, everyday access and communication for learners.

• SPEECH AND LANGUAGE PATHOLOGIST

Capitol Region Education Council (2019-2020)

Naugatuck Public Schools (2015-2019)

Across grades Pre-K to 12, I provided speech and language therapy and comprehensive diagnostic evaluations for students with mild to severe communication needs, including autism, learning disabilities, language impairments, intellectual disabilities, ADHD, social-pragmatic disorders, articulation and phonology disorders, and medically complex profiles. I collaborated extensively with multidisciplinary teams, partnering with families, educators, other related service providers, administrators, and advocates through consultation, training, and team meetings to ensure cohesive, high-quality support. My work included collecting, interpreting, and sharing data to guide eligibility decisions and therapeutic direction, as well as billing for reimbursable services. I consistently engaged in professional development to strengthen my practice and improve outcomes for students and colleagues. In Naugatuck, I contributed to districtwide efforts as a founding AT team member and provided consultation to district schools regarding AT needs.



Alison G. Cianciolo, MA CCC-SLP
Capitol Region Education Council
acianciolo@crec.org

Education

M.A. **Kean College, Union NJ.** Masters of Arts in Speech and Language Pathology. Internship at St. Barnabus Hospital in Craniofacial Disorders and Geriatrics. Graduated cum laude.

B.S. **East Stroudsburg University, East Stroudsburg, PA.** Bachelor of Science in Speech Pathology.

Experience

Feb. 2013-present

- **Capitol Region Education Council (CREC),
111 Charter Oak Dr., Hartford, CT
Education Specialist/Speech Pathologist
CREC Resource Group**
Developed functional curriculum in alignment with the Common Core State Standards and Common Core Essential Elements (grades 9-12); comprehensive Speech and Language Assessments; developed Blueprint Module: **Building Powerful Inclusion and Collaboration: Developing Effective Models for Inclusive/LRE Practices for Students with Significant Disabilities**; instructional coach for **Evidence Based Practices for Speech and Language Pathologist/Special Educators, Inclusion, LRE, SRBI**; COMPASS trainer; facilitator of **PATH (Planning Alternative Tomorrows with Hope)** and **MAPS (McGill Action Planning System)**; Leadership Challenge Participation; co-presenter at UDL-IRN (Universal Design for Learning Implementation and Resource Network) Inaugural Conference; Universal Design for Learning; conducts **Independent Education Evaluations** throughout the state for students with communication disorders and Autism Spectrum Disorder; **Paraeducator Initiatives Coordinator**: coordinator for state Paraeducator Development and Leadership Symposium (2016-present); member of the State of Connecticut Paraprofessional Council; oversees curriculum for COMPASS Modules: Paraeducator Curriculum for Professional Development that aligns with the National Standards for Paraeducators; mentor for **Alternate Route to Certification(ARC)** for special education certificate.; Transition Programming, Training of Speech and Language Departments on Current Practices in the Field. **CTSEDS and IEP Quality Trainer and Facilitator** for Speech and Language Pathologists and Special Education Teachers.

- **Speech and Language Pathologist** Oct 2011-Feb 2013
 - Provided service to communicatively handicapped students 1st through grade 12 in the **Magnet Schools Division**. Application and usage of speech/voice recognition applications and high tech Assistive Technology. Consult with special and regular education teachers to develop modifications. Liaison between districts for PPTs. Supervisor for SLPA student intern. Participant on Speech and Language Pathologist interview panel.

- **Charter Oak State College** Aug. 2013-present
- **55 Paul J. Manafort Dr.**
- **New Britain, CT**
 - **Professor for Speech and Language Pathology**
 - **Assistant Certification**
 - COM102: Introduction to Language and Communication Development
 - COM103: Standards and Practices for SLPAs in the School

Bloomfield Board of Education, Carmen Arace Intermediate and Middle Schools, 390 Park Ave., Bloomfield, CT. Feb. 2007-Oct. 2011

- Diagnosis and therapeutic planning for communicatively handicapped students-ASD, SLD, fluency and SLI. Point person responsible for focus monitoring. PPT chairperson. Special Education team leader. CFY Supervisor/Mentor. Collaboration in developing Scientifically Research Based Intervention Manual for Bloomfield Public Schools. Collaboration and in servicing of school population on communication disorders impact on the learning process. Turnkey information on language disorder vs. language difference. Assistive technology (Go Talk) and sign language. Maintenance of special education files for SLI students. Monthly statistical report. Medicaid reporting. Parent conferences. Administration and proctoring of Connecticut Mastery Test and District wide assessments. SRBI testing and implementation. Differentiated Instruction. Co teaching in regular education setting. Provided professional development on the State of Connecticut Speech and Language Guidelines.

Special Education Data Team Leader

responsible for collecting/tabulating and report generating of 7th and 8th grade students.

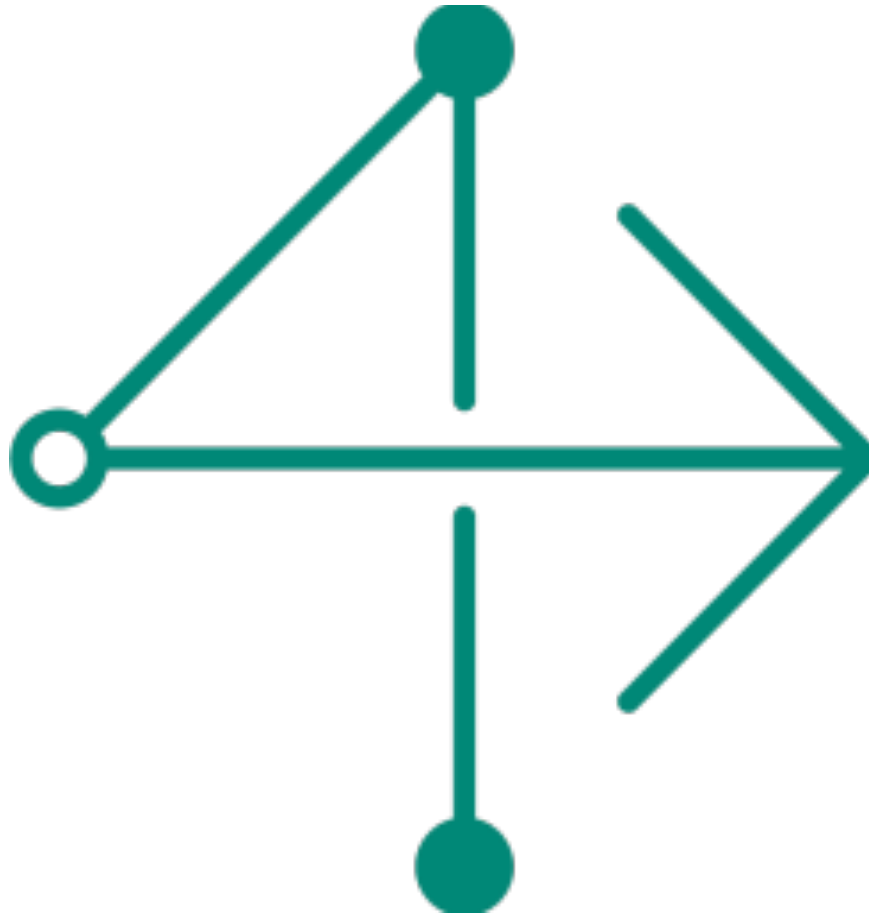
Development of Bloomfield Public Schools SRBI Manual. Professional Development presenter: Modifications, Accommodations and Differentiated Instructional Strategies. Dynamic Assessment Model presentation.

- **Hartford Public Schools,** Oct. 1992-Feb. 2007
MD Fox Elementary School
- **250 Maple Ave. Hartford, CT.**
 - Implementation of therapeutic/diagnostic plans for mono/bilingual communicatively handicapped population. Maintenance check for FM equipment for hearing impaired students. Attendance and running of PPTs. Coteaching with regular education staff members. Professional development on language disorders and language differences. Success for All reading program. Lindamood-Bell Phonemic Awareness Program. Maintenance of records. Medicaid reporting. Monitoring, proctoring and administration of the CMT.
- **Waterbury Public Schools, Grand St., Waterbury, CT.** Sept. 1985-Sept. 1992
 - Speech and Language Pathologist in an urban school district. Diagnostic and prognostic approach to communicatively handicapped children. Attendance at PPTs. Maintenance of records. Service provider in 5 different elementary schools. Collaboration with school community.

Publications

Assisted in the norming of the following published assessments for Speech and Language Disorders:

- Diagnostic Evaluation of Language Variance-First Edition. 2000
- Phonological Awareness Test-First Edition. 1993
- Comprehensive Receptive and Expressive Vocabulary Test-First Edition. 1990



Technical Proposal for Special Education Program Review

Submitted to Westport Public Schools (27-003-RFP)

August 25, 2026

Submitted by:

Dr. Scott Joftus, President

Scott@FourPointEducation.com

301-524-2603

www.FourPointEducation.com

I. Cover Letter and Certification

Elio Longo, Chief Financial Officer
Westport Public Schools

Dear Mr. Longo and Members of the Selection Committee:

On behalf of FourPoint Education Partners ("FourPoint"), a limited liability company, I am pleased to submit this proposal to conduct a comprehensive, system-level review of Westport Public Schools' PK-12 special education programs and services. We are excited about the opportunity to partner with the District to ensure your continuum of services is effectively aligned to student needs, implemented with fidelity, and supports placement in the least restrictive environment.

As the President of FourPoint, I will serve as the primary contact for this proposal and the authorized signatory for any resulting contract. Our proposed team, led by myself as Project Director, Dr. Alice Parker, Dr. Mary Ann Dewan, Sharon Deich, Dr. Connie Wehmeyer, and Valda Valbrun, will execute this work directly without the use of subcontractors. Please note that there have been no material changes to our organization, proposed team, availability, or qualifications since our initial RFQ submission (RFQ #26-025-RFQ).

In accordance with the requirements set forth in the RFP, FourPoint formally certifies and commits to the following:

1. **Validity:** This proposal and the accompanying separate fee proposal shall remain valid and binding for a period of at least 120 days from the submission deadline of September 1, 2026.
2. **Mandatory Proposal Commitments:** FourPoint accepts and commits to all mandatory requirements outlined in Section 3 of the RFP without exception. Specifically, we commit to:
 - Completing the full review, final report, and Board of Education presentation within four to six months from the project kickoff.
 - Designing, administering, analyzing, and reporting on districtwide surveys for both families of students with disabilities and staff who support them.
 - Conducting comprehensive onsite visits and observations covering all school levels and major program types, including specialized and transition/18-22 programming.

- Facilitating interviews and focus groups with a balanced, representative set of central office leaders, building administrators, teachers, support staff, families, and (where approved) students.
- Assigning our named key personnel, including leaders with substantial special education experience, with the understanding that substitutions require prior District approval.
- Strictly adhering to FERPA-aligned data handling and ensuring all public reporting focuses on systemic patterns in aggregate, de-identified form.
- Delivering all required reports, executive summaries, presentations, and actionable, prioritized recommendations.
- Submitting a complete, transparent fee proposal in a separate file from this technical proposal.

We look forward to the opportunity to support Westport Public Schools in its pursuit of equitable, high-quality outcomes for all students.

Sincerely,

A handwritten signature in black ink, appearing to read "Scott Joftus", with a stylized flourish at the end.

Dr. Scott Joftus
President & Authorized Signatory
FourPoint Education Partners S
Scott@FourPointEducation.com
301-524-2603

II. Understanding of Westport and Research Questions

Understanding of Purpose, Context, Priorities, Scope Boundaries, and Outcomes

Based on our review of Westport Public Schools' (WPS) Request for Proposals and publicly available data, FourPoint understands that WPS maintains a comprehensive continuum of supports across its nine school sites—one preschool, five elementary schools, two middle schools, one high school, and one transition program. The District has made significant investments in early identification, MTSS structures, inclusive instructional settings, intensive behavioral and mental-health supports, and specific programming such as the Connections Transition Program for students ages 18–22.

While the District is recognized for maintaining a strong, compliant system, WPS is seeking an independent, system-level review to move beyond basic procedural compliance. The primary purpose of this engagement is to evaluate whether the District's wide array of services is coherent, consistently implemented across all buildings, appropriately aligned to individual student needs, and effective in placing students in the least restrictive environment (LRE).

We clearly understand the District's key priorities, which have been heavily informed by community feedback. These include investigating family satisfaction and communication breakdowns, verifying the fidelity of IEP service delivery, analyzing outplacement trends and criteria, evaluating the consistency of early intervention/MTSS, assessing training needs for paraeducators, and evaluating the quality of transitions across grade spans.

Furthermore, FourPoint recognizes the strict scope boundaries of this review. Our evaluation will remain focused entirely on system-level program effectiveness. We understand that we are not authorized to adjudicate individual student or personnel disputes, make legal compliance findings regarding IDEA or Section 504 in specific cases, or conduct forensic financial or ADA facilities audits. We understand that the District is interested in resource allocation and special education spending only as it relates to the broader question of systemic program effectiveness.

Our ultimate desired outcome is to provide WPS with a clear, evidence-based final report featuring a focused set of practical, prioritized, and actionable recommendations that can be implemented in the short, medium, and long term.

Proposed Review Questions and Thematic Connections

To ensure our methodology yields the insights Westport requires, FourPoint proposes adopting the District's 10 Guiding Review Questions. To answer these comprehensively, we will utilize our Four-Pillar Special Education Framework, an evaluation model designed to connect student needs, services, LRE, experiences, outcomes, and resources (Figure 1) that includes aligned surveys as well as interview focus group, observation protocols.¹ Figure 2 outlines how the District's guiding questions directly map to the Framework. By filtering the District's guiding questions through these

¹ FourPoint has revised its Special Education Framework since submitting the RFP proposal.

four pillars, FourPoint will provide a holistic, interconnected evaluation of Westport's special education programming. This mapping ensures that our analysis does not view compliance, instruction, finance, or family engagement in isolation. Instead, it systematically traces how resource allocation (Pillar 1) impacts the continuum of care (Pillar 3), how that care is delivered in the classroom (Pillar 2), and how it is ultimately experienced by the Westport community (Pillar 4).

Figure 1. FourPoint's Four-Pillar Special Education Framework

Pillar	Indicators
1. Organizational Vision & Operational Efficacy	a. Learner-Centric Governance b. Strategic Resource Allocation c. Data-Informed Protocols d. Collaborative Leadership
2. Inclusive Pedagogy & Affirming Climate	a. High Expectations & Growth Mindset b. Rigorous Universal Instruction c. Culturally Sustaining Spaces d. Active Student Agency
3. Individualized Design & Continuum of Care	a. Support Planning & Implementation b. Behavioral Health & Wellness c. Life-Course Transitions
4. Educator Excellence & Ecosystem Support	a. Recruitment & Retention b. Empowered Professional Practice c. Transparent Stakeholder Engagement d. Accessible Community Hubs

Figure 2. Alignment between WPS Guiding Questions and FourPoint's Four-Pillar Special Education Framework

WPS Guiding Review Questions	FourPoint Evaluation Pillar	Connection to the Systemic Ecosystem
1. To what extent is the District's PK-12 continuum of services, including transition/18-22 programming sufficient, consistently understood, and aligned to student needs?	Pillar 3: Individualized Design & Continuum of Care	• Evaluates the initial identification of student needs and the availability of appropriate services across the PK-12 continuum.
2. To what extent do early intervention, MTSS/RTI, referral, evaluation, IEP development, placement, and progress-monitoring practices support appropriate and timely services?	Pillar 3: Individualized Design & Continuum of Care	• Assesses the specialized compliance, care, and precision education planning required to match interventions to individual profiles.
3. To what extent are services and supports described in IEPs implemented consistently and effectively at the system level?	Pillar 3: Individualized Design & Continuum of Care	• Evaluates the systemic fidelity with which highly specialized services and IEPs are actually delivered to students.

WPS Guiding Review Questions	FourPoint Evaluation Pillar	Connection to the Systemic Ecosystem
4. How effectively does the continuum support LRE, inclusion, access to curriculum and extracurricular experiences, and student progress?	Pillar 2: Inclusive Pedagogy & Affirming Climate	Evaluates whether students are successfully supported in the LRE and general education spaces.
5. What patterns are evident in academic, behavioral, social/emotional, graduation, and transition-related outcomes?	Pillar 2: Inclusive Pedagogy & Affirming Climate	Measures the tangible academic, behavioral, and social-emotional outcomes resulting from universal and specialized interventions.
6. What trends and gaps are evident over time between students with disabilities and students without disabilities in academic achievement and growth, and what measures does the District use to determine grade-level progress or mastery and communicate progress to families?	Pillar 2: Inclusive Pedagogy & Affirming Climate	Analyzes systemic achievement and growth gaps, ensuring rigorous universal instruction is reaching all learners.
7. How do students, families, educators, providers, paraeducators, administrators, and other stakeholders experience the system? How do these stakeholders experience the system if/when there is a disagreement with a proposed program or placement?	Pillar 4: Educator Excellence & Ecosystem Support	Captures the lived experiences, perceptions, and transparent stakeholder coalitions navigating the system and resolving conflicts.
8. What factors contribute to outplacement, and where may opportunities exist to strengthen in-district capacity while preserving individualized decision-making?	Pillar 1: Organizational Vision & Operational Efficacy	Investigates operational frameworks, placement trends, and the strategic road mapping needed to build internal capacity.
9. How effectively are staffing, professional learning, time, services, spending, and other resources aligned to student needs and outcomes?	Pillar 1: Organizational Vision & Operational Efficacy <i>and</i> Pillar 4: Educator Excellence & Ecosystem Support	Evaluates how systemic resources (budget, time) and adult capacity (professional learning) are deployed to support the entire continuum.
10. What actionable, prioritized changes should the District consider in the short, medium, and longer term?	Pillar 1: Organizational Vision & Operational Efficacy	Focuses on data-informed, strategic governance to map out actionable, prioritized recommendations for long-term improvement.

III. Detailed Methodology and Work Plan

FourPoint proposes a comprehensive, mixed-methods research design anchored by our Four-Pillar Special Education Framework. Our methodology is designed to triangulate quantitative data (e.g., state benchmarking, budget analytics, and IEP audits) with qualitative insights (e.g., classroom observations, focus groups, and open-ended survey responses) to isolate systemic patterns from isolated experiences.

Per the requirements of the RFP, below is our detailed approach addressing each component of Section 5. *(Note: Detailed methodologies for Family/Staff Surveys [Component 5.3] and Onsite Visits [Component 5.4] are provided in Sections IV and V of this proposal, respectively, to align with the District's requested submission formatting).*

5.1 Project Initiation, Governance, and Management

Our review will begin with a structured kickoff meeting (held virtually) with Westport Public Schools (WPS) leadership. During this meeting, we will confirm the final review questions, establish communication protocols, clarify data-sharing and confidentiality expectations, and define key dependencies.

- **Project Leadership:** Dr. Scott Joftus will serve as the Project Director, holding ultimate authority over scope, schedule, and quality and serving as the point of contact for WPS.
- **Project Management Plan:** Within two weeks of the kickoff, FourPoint will deliver a comprehensive project management plan featuring milestones, responsible parties, meeting cadences, and risk-mitigation strategies (e.g., contingency plans for low survey response rates).
- **Data Request:** We will utilize a secure, FERPA-compliant portal to submit a comprehensive initial data and document request, prioritizing an efficient process that minimizes the administrative burden on WPS staff.

5.2 Document, IEP, Data, Benchmarking, and Resource Analysis

FourPoint's analytical procedures are designed to move beyond compliance and evaluate program effectiveness through several lenses:

- **Document and Data Review:** We will analyze relevant District policies, MTSS/RTI structures, LRE and placement data, outplacement trends, attendance, discipline, and academic outcomes (including graduation and transition rates). We will disaggregate these data by school level, program, disability category, and placement type, utilizing strict suppression rules for small *N* sizes to protect privacy. See Figure 3 for a partial resource analysis conducted for a recent FourPoint client.

- **IEP and Record Review Methodology:** To ensure findings are representative of the system, we will conduct a stratified random sample review of 75-90 IEPs (proportionately representing all nine schools, major disability categories, and specialized programs like the Connections Transition Program). Led by Dr. Alice Parker, our team will use a structured rubric to evaluate the alignment between present levels of performance, student needs, goal rigor, specially designed instruction, accommodations, and evidence of educational benefit/progress monitoring. Reviewers will undergo calibration training to ensure high inter-rater consistency.
- **Benchmarking and Gap Analysis:** Using EdSight and other databases, we will benchmark WPS data against Connecticut State averages, the District Reference Group (DRG), and carefully selected comparable districts. Led by Sharon Deich and an analyst, we will explicitly analyze trends and gaps in academic achievement and growth between students with and without disabilities over time.
- **Resource and Cost-Effectiveness Analysis:** Led by Sharon Deich and analyst, we will conduct a systemic analysis of special education spending, staffing ratios, outplacement costs, and resource allocation. We will evaluate whether current human and financial investments are effectively aligned to student needs and producing the desired outcomes. See Figure 4 for a partial resource analysis conducted for a recent FourPoint client.
- **Analytic Limitations:** All analyses will distinguish between correlation and causation and will clearly state methodological limitations regarding data quality or sample sizes.

Figure 3. Partial Extant Data Analysis from a FourPoint Client: Teacher Quality

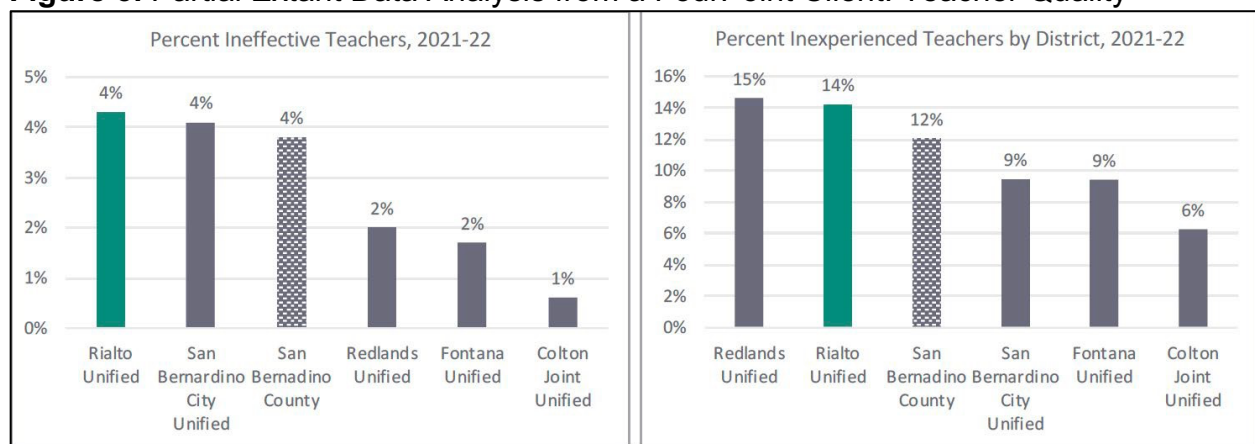
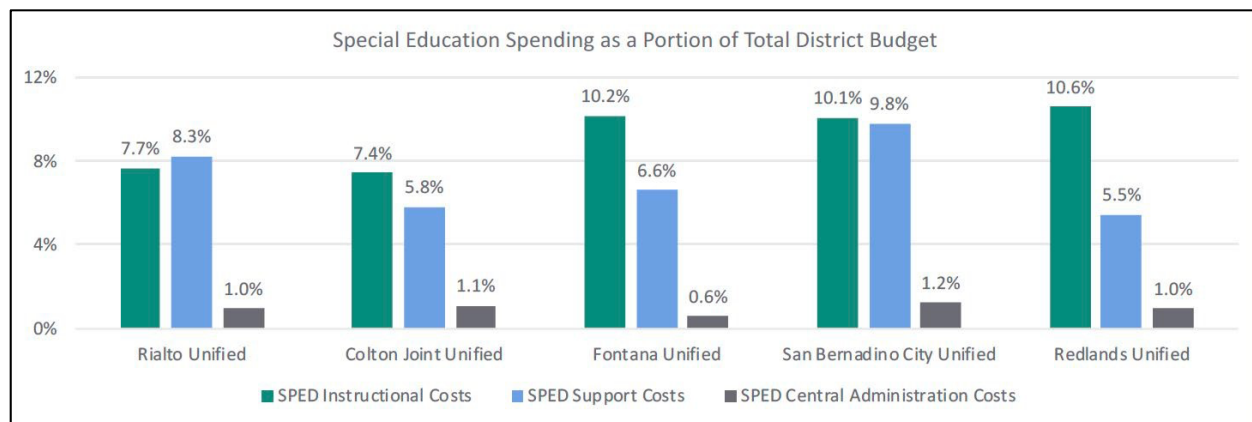


Figure 4. Partial Extant Data Analysis: Special Education Funding



5.3 Family and Staff Surveys and Stakeholder Engagement

See Section IV of this proposal.

5.4 Onsite School Visits and Classroom/Program Observations

See Section V of this proposal.

5.5 Continuum, LRE, Service Delivery, Access, and Outcomes

Through the triangulation of our data, document reviews, and onsite observations, we will conduct a systemic evaluation of the PK-12 continuum. Our analysis will focus on:

- **Consistency and Fidelity:** Evaluating how consistently early intervention, Child Find, MTSS/RTI, and referral/evaluation pathways are implemented across the preschool, five elementary schools, two middle schools, and high school.
- **LRE and Access:** Examining how placement decisions are made, assessing whether students are supported in the least restrictive environment, and analyzing access to grade-level curriculum, electives, and extracurricular activities.
- **Transitions:** Evaluating the structural support and data-sharing processes during critical transitions (PK to elementary, elementary to middle, middle to high, and high school to post-secondary/18-22 programming).
- **Staff Capacity:** Reviewing professional learning, role clarity, and supervision structures for special education teachers, related service providers, and paraeducators.

5.6 Findings, Recommendations, Reporting, and Initial Action Planning

Our reporting process emphasizes continuous District engagement to ensure accuracy and actionability:

- **Interim Briefings:** We will provide at least one interim briefing to District leadership to discuss emerging themes, address data limitations, and request contextual clarifications.
- **Draft and Final Reports:** We will submit a draft findings memorandum for factual review by the District, ensuring contextual accuracy without compromising the independence of our professional judgment. The final report will include an executive summary, methodology, data limitations, strengths, areas for improvement, and prioritized recommendations.
- **Actionable Recommendations:** For each major recommendation, we will detail the supporting evidence, suggested implementation horizon (short, medium, long term), key dependencies, anticipated resource implications, and suggested progress measures.
- **Action Planning and Presentation:** We will facilitate an action-planning session with District leadership to support initial prioritization and present our final, de-identified, public-facing findings to the Board of Education.

“FourPoint is the best thought partner I’ve ever had. After engaging our community, they provided an insightful, equity-focused assessment of our district that provided a strong foundation for our strategic plan. They continued engaging our community during the planning process and managed to push our board and administration to be bold and bought into the change process. After the plan was approved unanimously, FourPoint continued providing invaluable support by helping to manage the change process, restructure our central office, and provide leadership and culture training. I recommend them whole heartedly to any district.”

Dr. Susan Zola,

Retired Superintendent (IL Superintendent of the Year), Champaign Unit 4 (IL) Public Schools

IV. Family and Staff Surveys and Stakeholder Engagement Plan

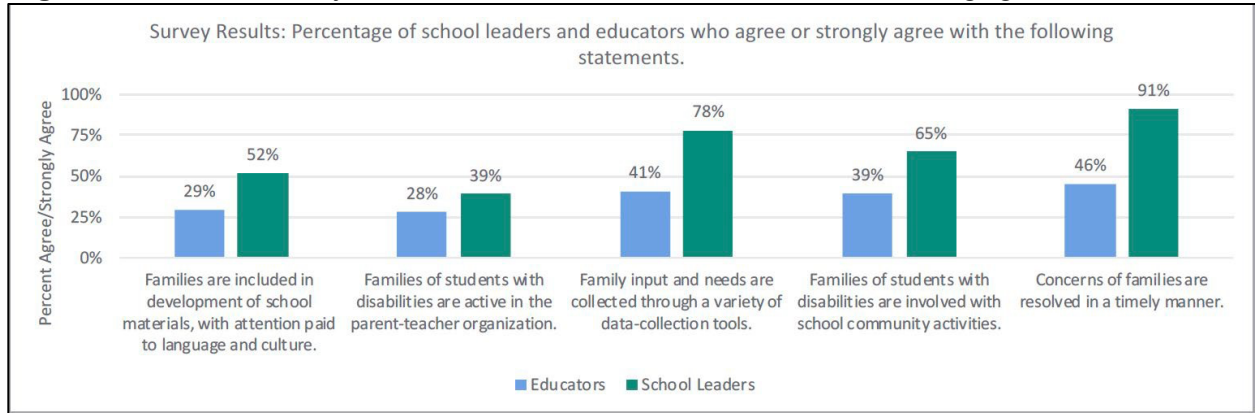
Stakeholder engagement is fundamental to FourPoint's methodology, ensuring that our evaluation captures the lived experiences of the Westport community while distinguishing isolated incidents from systemic patterns.

Districtwide Survey Design and Administration

FourPoint will adapt two of our surveys (families of students with disabilities and staff who teach, support, supervise, or make decisions affecting these students) aligned with the Four-Pillar Special Education Framework and incorporate feedback from WPS, administer them using Survey Monkey, analyze the data, and report on the findings.

- **Survey Domains:** Survey items will be adjusted to map onto Westport's guiding questions, covering domains such as communication and responsiveness, family experience with the IEP/PPT process, perceived service effectiveness and fidelity, access to supports, inclusion, mental-health and behavioral supports, transitions, access to academic/ nonacademic opportunities, and overall satisfaction.
- **Platform and Accessibility:** Surveys will be administered via Survey Monkey, a secure, mobile-compatible platform that decouples identifying metadata from substantive responses to ensure complete anonymity. The surveys will be offered in multiple languages to guarantee language access and barrier-free participation.
- **Response-Rate Strategy:** To maximize participation, FourPoint will collaborate with the District to deploy advance communications, scheduled reminders, and accessible formats distributed through approved District channels.
- **Qualitative Coding:** In addition to Likert-style items, the surveys will include open-ended response opportunities. FourPoint will utilize a defensible qualitative coding process, employing multiple analysts to code responses for recurring themes, supplemented by quality-control procedures to ensure inter-coder reliability.
- **Disaggregation and Reporting:** We will disaggregate survey results by school level, staff role, and other relevant demographic categories, strictly enforcing privacy-protective minimum group sizes to prevent the identification of individuals. Our final reporting will transparently detail the number of invitations distributed, completed responses, response rates, applicable denominators, and subgroup representation. Where feasible, we will assess potential nonresponse bias and will carefully caveat limitations, ensuring we do not characterize findings as "districtwide" unless the participation data definitively supports that conclusion. See Figure 5 for example survey data from a recent FourPoint client.

Figure 5. Partial Survey Data from a Recent Client: Stakeholder Engagement



Stakeholder Interviews, Focus Groups, and Listening Sessions

To contextualize the survey data, FourPoint will conduct targeted qualitative engagement, including approximately 10 interviews and 15 focus groups.

- **Target Audiences:** We will engage a balanced set of central office leaders, school administrators, special education and general education teachers, related service providers, paraeducators, mental-health/behavior staff, families, and (where appropriate and District-approved) students.
- **Sampling and Selection:** We will work with the District liaison to utilize a stratified selection approach, ensuring diverse and balanced participation across school levels, program types, disability profiles, and placement environments.
- **Protocols and Analysis:** All sessions will be guided by consistent, structured protocols aligned to our evaluation pillars. FourPoint’s analysts are highly trained in triangulating stakeholder input with IEP data, classroom observations, and survey results. This rigorous triangulation ensures that our final reporting identifies verified, corroborated system-level patterns rather than adjudicating individual complaints or elevating isolated experiences. All findings will be reported in aggregate and de-identified forms.

V. Site Visit and Observation Plan

Onsite visits are a critical component of FourPoint's review, allowing us to evaluate the fidelity of service delivery, the application of specially designed instruction, and the cultivation of an affirming climate across the District.

Scope and Scale of Onsite Visits

FourPoint proposes a comprehensive four-day site visit conducted by a four-member team of subject-matter experts (including Dr. Scott Joftus, Dr. Connie Wehmeyer, Dr. Mary Ann Dewan, and Valda Valbrun).

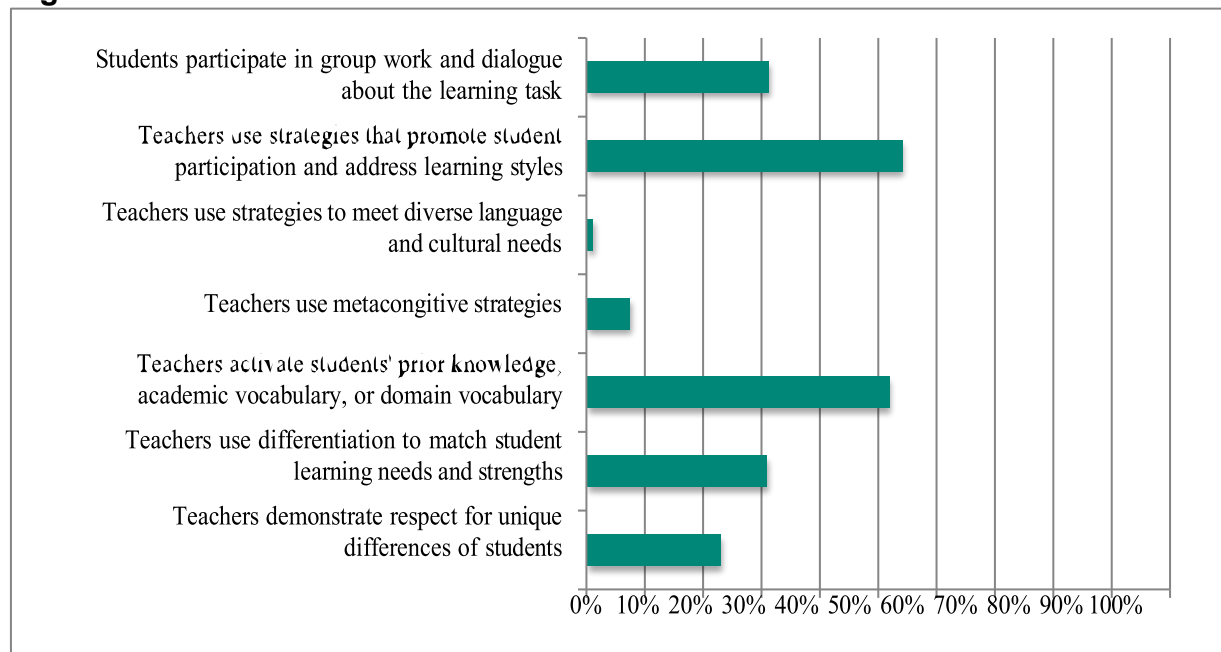
- **Interviews, Focus Groups, and Observations:** The subject-matter experts will be divided into two groups—one to conduct interviews and focus groups and the other to conduct classroom/program observations.
- **Building Coverage:** To support valid cross-school and districtwide conclusions, observers will conduct observations across all nine District buildings, guaranteeing representation across the preschool, five elementary schools, two middle schools, the high school, and the Connections Transition Program.
- **Observation Settings:** We anticipate conducting approximately 40 structured observations. These will comprehensively cover Westport's full continuum, including general education/inclusion settings, co-taught classrooms, resource supports, intensive and specialized programs, clinical/therapeutic or behavioral supports, transition/18-22 programming, and nonacademic or extracurricular contexts where feasible. We will also observe related service delivery where appropriate and non-disruptive.

Structured Observation Framework and Execution

- **The FCW Tool:** FourPoint will utilize an adapted version of our web-based Focus Classroom Walkthrough (FCW) tool. The protocol will be explicitly aligned to Westport's guiding questions, capturing real-time data on the LRE, access to grade-level instruction, the delivery of specially designed instruction, service model implementation, student engagement, the use of accommodations/modifications, and evidence of student independence, belonging, and inclusion.
- **Observer Qualifications and Calibration:** All FourPoint team members possess substantial leadership and instructional experience in special education. Prior to the Westport site visits, the observation team will undergo a dedicated calibration and norming session using the customized FCW protocol to ensure high inter-rater reliability and consistent documentation.

- **System-Level Focus:** Observations will be strictly programmatic and non-evaluative. We will carefully coordinate all scheduling with the District to minimize educational disruption. Our observers will not evaluate individual students or staff members.
- **Analysis and Reporting:** Observation data will be aggregated systematically and triangulated with IEP record reviews, document analysis, and stakeholder feedback to form the basis of our evidence-based findings and recommendations. See Figure 6 for a partial analysis of classroom data for a recent FourPoint client.

Figure 6. Partial Classroom Observation Results from a FourPoint Client



VI. Data, IEP, Benchmarking, and Resource Analysis Plan

FourPoint’s analytical approach is designed to transform disparate data points into a coherent narrative about system-level effectiveness. We understand that while WPS consistently ranks among the highest-performing districts in Connecticut, statewide data from EdSight often reveals persistent achievement and growth gaps between students with disabilities (SWD) and their non-disabled peers, even in high-resourced District Reference Group (DRG) A communities. Our data analysis will investigate the root causes of these gaps and evaluate how resources are deployed to close them.

Requested Data Sets, Documents, and Analytic Approach

To build a comprehensive profile of the District’s programming, FourPoint will submit a targeted data request via a secure, FERPA-compliant portal.

- **Datasets:** We will request aggregate and disaggregated data (suppressed for privacy) regarding enrollment, disability identification rates by category, referral/evaluation timelines, LRE/placement percentages, outplacement figures, attendance, discipline, and post-secondary transitions.
- **Documents:** We will review District policies, MTSS/RTI procedural manuals, master schedules, caseload/workload data, professional learning materials, and family communication protocols.
- **Disaggregation:** Data will be disaggregated by school level, and—depending on sufficient sample size—specific program (e.g., Intensive Resource, Connections Transition Program), disability category, and demographic subgroups to identify systemic inequities or disproportionality.

Achievement, Growth, and Gap Analysis

Understanding that WPS utilizes state assessments (Smarter Balanced/SAT) alongside local benchmarking measures, our team will analyze longitudinal academic achievement and growth.

- **Gap Analysis:** We will analyze the trends and gaps over time between SWD and students without disabilities. We will move beyond proficiency scores to examine growth metrics, analyzing whether SWDs are making at least a year's worth of academic progress in a year's time.
- **Progress Communication:** We will evaluate the specific measures the District uses to determine grade-level mastery and examine the clarity, frequency, and effectiveness of how this progress is communicated to families, addressing concerns raised in community feedback.

IEP and Record Review Methodology

Recognizing Connecticut's recent transition to CT-SEDS, we will evaluate how effectively District staff are utilizing the system to develop high-quality, individualized plans.

- **Sampling:** We will conduct a stratified random review of 75–90 IEPs, ensuring representative sampling across all nine schools, transition programming, and major disability categories.
- **Review Rubric:** Using a structured, calibrated protocol, we will analyze the internal alignment of each IEP, tracking the "golden thread" from present levels of performance to student needs, goal rigor, the provision of specially designed instruction, accommodations, and the selected placement. This will allow us to report on systemic trends regarding IEP quality and service delivery consistency.

Benchmarking against State and Peer Data

To provide meaningful context, FourPoint will benchmark WPS data against relevant comparison groups.

- **Comparison Groups:** We will utilize EdSight to compare WPS's identification rates, LRE placements, outplacement trends, and achievement data against Connecticut state averages and DRG A peers (e.g., Darien, New Canaan, Weston).
- **Methodology:** We will clearly explain the selection criteria for these comparison groups and transparently communicate any data limitations, ensuring the Board of Education and community have a reliable benchmark for evaluating the District's standing.

Staffing, Resource Allocation, and Cost Effectiveness

Led by Sharon Deich, our Center for Financing School-Community Partnerships team will conduct a thorough analysis of how WPS invests its resources.

- **Cost-Effectiveness and Outplacement:** High outplacement costs are a common challenge in Fairfield County. We will analyze the factors driving WPS outplacements and evaluate the financial and programmatic cost-effectiveness of these decisions compared to strengthening in-district capacity and specialized programming.
- **Strategic Staffing:** We will map school master schedules against student IEP LRE requirements to analyze the efficiency of co-teaching models and paraprofessional deployment, ensuring staffing models are driven by student need rather than historical precedent.

Maintaining a Program-Effectiveness Focus

FourPoint understands that this review is an evaluation of program effectiveness, not a forensic accounting exercise or a legal compliance audit. While we will review spending patterns, outplacement costs, and adherence to procedural timelines, our analysis will focus strictly on how these elements impact system-level capacity, resource alignment, and student outcomes. We will not make legal findings regarding IDEA violations in individual cases, nor will we audit specific financial invoices; instead, our findings will focus on systemic coherence and actionable recommendations for District improvement.

“FourPoint was an incredible support to me during my first year as superintendent in Kentucky. Scott and the team are incredibly knowledgeable, but they understand that being ‘right’ doesn’t always win the day. They know that positive and equitable change also requires stakeholder support, leadership and staff capacity, and performance management to be successful. I would recommend FourPoint to any superintendent or district that is truly serious about improving systems and student outcomes.”

-- Dr. Demetrius Liggins, *Superintendent*, Fayette County (KY) Public Schools

VII. Proposed Team and Level of Effort

FourPoint is proposing a leadership team with years of experience working with and for school districts and states in the areas of equity reviews and strategic planning, leadership development, school and district improvement, community engagement, and project management.

A senior team with unmatched experience in special education reviews, school improvement, leadership development, and stakeholder engagement.

Project Coordination and Communication Approach

Dr. Scott Joftus will serve as the project director and primary point of contact for WPS. He will oversee all project management, ensuring milestones are met on time. Dr. Alice Parker will lead the special education compliance and IEP review process. Dr. Mary Ann Dewan will guide the instructional and leadership assessment with classroom observation support from Dr. Connie Wehmeyer. Sharon Deich will manage the financial and resource allocation review. Valda Valbrun will lead stakeholder focus groups and equity analysis. Our team will maintain bi-weekly status update meetings with the WPS project manager to ensure seamless communication and alignment. Figure 7 outlines responsibilities and estimated time commitments for these senior members of the team

Figure 7. Project Management Responsibilities and Time Commitments

Personnel	Responsibilities	Commitment to Project
Dr. Scott Joftus	Project Director. Ensure overall quality and allocate resources to project, liaison with district, participate in site visit, and lead review.	13 days = 19%
Dr. Mary Ann Dewan	Subject Matter Expert (SME). Lead observation work and participate in site visit.	10 days = 15%
Valda Valbrun	SME. Lead all work related to stakeholder engagement and participate in site visit.	9.5 days = 14%
Sharon Deich	SME. Lead all work related to data and financial analysis with support from analyst.	9 days = 13%
Dr. Alice Parker	SME and Advisor. Lead all work related to IEP and document review and participate in FourPoint team meetings.	8 days = 12%
Dr. Connie Wehmeyer	SME. Support classroom observations and participate in site visit.	8 days = 12%
TBD	Analyst. Support logistics planning, data request and analysis, and IEP review.	13 days = 19%

Personnel

Dr. Scott Joftus, co-founder and president of FourPoint, is the project director for the proposed engagement. Dr. Joftus brings significant experience helping districts across the country assess needs, evaluate programs, and plan for equitable improvement. This work has included a multi-year engagement with Hartford Public Schools (CT) to support leadership development, strategic and action planning, and performance management. FourPoint's engagement with HPS to address State findings related to the district's non-compliance with State and Federal requirements to protect children from abuse and neglect.



Dr. Joftus was the primary developer and is now the director of The Learning Network, a partnership approach to school and school system improvement, which was implemented statewide in Kansas and Washington, DC. He was also the founding director, senior strategic advisor, and technical assistance provider of the Race to the Top Technical Assistance Network, a \$43 million initiative funded by the U.S. Department of Education to help states implement major reforms and achieve dramatic improvements in student outcomes. For the past 20 years, Dr. Joftus has served as an adjunct professor at George Washington University's Graduate School of Education, where he teaches leadership, program evaluation, and education policy and where he was recently named a senior fellow.

During calendar year 2022, Dr. Joftus served as a member of the board of education for Montgomery County Public Schools (MD), the 15th largest district in the country, after being appointed by the board to complete term of a board member who passed away unexpectedly in September 2021. He now serves as on the board Montgomery County's Black and Brown Coalition, which advocates for improved student outcomes across the district.

Previously, Dr. Joftus served as the policy director for the Alliance for Excellent Education, where he helped develop the agenda for the newly created policy organization focused on ensuring all students graduate high school prepared for college. From 1998 to 2002, Dr. Joftus was director of policy, research, and evaluation for The McKenzie Group, an education policy consulting firm. In this position, he conducted numerous evaluations for and provided technical assistance to the U.S. Department of Education and states and school districts nationwide.

He also served as a senior associate at the Council for Basic Education and as a strategic planning consultant to the San Francisco-based think tank Public Policy Institute of California. In addition, he was an elementary school teacher as a member of the first-ever corps of Teach for America. Dr. Joftus earned his bachelor's degree in public policy from Duke University, a master's degree in public policy from the University of California at Berkeley, and a doctorate in education policy and leadership from The George Washington University.



Dr. Alice Parker, FourPoint’s director of special education, has more than 40 years of experience in education—in the classroom, as a building principal, a district administrator, and a director of special education and assistant superintendent of public instruction for California. Her areas of expertise include public policy and practice as well as federal- and state-compliant special education models that are rooted in the Response to Intervention approach to improving outcomes for all children at risk of school failure.



Dr. Parker has worked as a consultant to state departments of education, local school districts, and charter management organizations and agencies and provided support, consultation, and training to build leadership capacity, reduce disproportionate identification of students with disabilities, support effective education programs for adjudicated youth, and implement Response to Intervention, inclusive preschool options, and other systemic improvements.



Dr. Mary Ann Dewan—FourPoint’s newest partner—is an award-winning education leader with over 35 years of experience. Her extensive work focuses on systems change, leadership and organizational development, and teaching and learning improvement. Dr. Dewan is an expert in supporting strategic and sustainable partnerships that pave the way for learning and achievement for children and youth from cradle to career.



Throughout her career, Dr. Dewan has demonstrated her commitment to continuous improvement and strengths-based leadership to foster positive and impactful learning environments. Her experience as both a general education and special education teacher formed the foundation for her collaborative, wholistic, and service-oriented leadership style. Her leadership roles span site, district, county, and regional levels in a variety of roles including principal, director, assistant superintendent, and (most recently) county superintendent. She has significant experience partnering with local, state, and federal government agencies, leaders, and elected officials on policy efforts to advance early care and education, improve outcomes for students with disabilities, expand school-based health and wellness services, and increase access to educational opportunity. She is a national leader in advancing whole child policy implementation and securing funding to address digital equity, chronic absenteeism, foster youth services, youth civic engagement, childcare, youth mental and behavioral health, and cross system data sharing.

Due to her impactful leadership, Dr. Dewan has received several significant recognitions. She was named a Woman of Influence by the Silicon Valley Business Journal in May 2023. In September of 2024, Dr. Dewan received the National Individual Achievement Award from the Association of Educational Service Agencies. In March 2025, she was honored to receive the Champion for Children Award from the Santa Clara County Children’s Agenda Network.

Dr. Dewan earned her doctorate in education at Indiana State University. She serves on several committees and nonprofit boards of directors to advance collaborative partnerships that benefit

children and families with systems improvement, food stability, mental and behavioral health, and healthcare.



Sharon Deich—who led FourPoint’s engagement with Hartford Public Schools and surrounding districts related to community school financing—is a FourPoint partner and director of FourPoint’s Center for Financing School-Community Partnerships. The Center provides technical assistance to districts, non-profits and foundations to promote sustainability; facilitates strategic planning for partnership efforts in early learning and K12 systems; develops multi-year sustainable financing plans for districts and nonprofits; conducts financial analyses for school districts looking to reallocate resources toward priority areas and nonprofits looking to scale their work; supports learning networks of district and city leaders to address financing challenges; and develops tools and resources to build capacity for districts and nonprofit organizations to improve financing and reach more students.



Ms. Deich also provides strategic counsel to foundation officers to help guide strategy and funding decisions. Her work builds on two decades of experience in the nonprofit sector that includes research, policy analysis, and technical assistance. She has worked with federal agencies, state government leaders, city officials, foundation initiative leaders, and nonprofit organizations on issues related to early care, K12 education, afterschool programming, community schools, school-community partnerships and related education reform efforts. From 1997 to 2007, Ms. Deich served as an associate director for The Finance Project, where she authored numerous briefs and reports on the financing of human services programs and provided technical assistance and expert facilitation to organizations looking to scale up and sustain promising initiatives. During this period, she also served on numerous advisory boards, including one for a joint project of the National Governors Association, the Council of Chief State School Officers, and the National Conference of State Legislatures to expand extra learning opportunities as a way to improve student success.

Before joining The Finance Project, Ms. Deich spent 15 years researching and evaluating programs that support children and families in under-resourced communities. Her prior experience includes work for the American Institutes for Research, where she worked closely with the Head Start Bureau to revise performance standards and the training and technical assistance system. She also spent six years working at the Urban Institute, where she was a contributing researcher and author for the National Child Care Study.



Valda Valbrun, senior associate at FourPoint, has worked nationally on leadership development and executive coaching and provides coaching and professional development to aspiring, newly appointed and experienced leaders. She started her career over 28 years ago and currently provides leadership development and consulting as well as training specifically targeted to build the capacity of culturally proficient leaders and staff who can address issues of equity, diversity, and inclusion. She offers support in the areas of strategic planning, strategy management and organizational development and works specifically to build the capacity to lead for equity, create equitable environments, mitigate opportunity gaps, implement systems for improvement, and manage change for results.



As an equity specialist, she is a certified administrator of The Intercultural Development Inventory® (IDI®) which assesses intercultural competence. As an IDI-qualified administrator, she is certified to administer the IDI to others as well as apply the IDI to her own work, both in how she demonstrates cross cultural knowledge and navigates cultural differences, and in how she supports organizations as they advance equity initiatives to address challenges, increase cultural understanding, and support the accomplishment of equity goals.

Ms. Valbrun is also trained and certified in Facilitative Leadership for Social Change to help her clients as they manage issues of culture, class, and equity and confront systems that threaten inclusive practices. Specifically, training in Facilitative Leadership for Social Change is designed to help lead the conversations to get diverse community groups to shared goals by using collaborative processes, frameworks, skills, resources, and tools designed to gather and understand diverse perspectives.

In addition to her district level leadership roles, Ms. Valbrun has served as the director of professional learning at ASCD and as the executive director of organizational development for Charlotte-Mecklenburg Schools (NC).

Connie Wehmeyer, FourPoint's director of teaching and learning, will serve as a subject-matter expert (classroom walkthroughs) and school coach for the proposed engagement. She leads the firm's focus on PK12 curriculum and instruction to support school and district improvement and instructional leadership, doing so in districts as diverse as the District of Columbia, Kansas City (KS), and Cecil County (MD).



Dr. Wehmeyer has more than 30 years of experience as an educator and administrator. As a district administrator for teaching and learning, she facilitated the creation of a standards-based written curriculum, developed structures and processes to facilitate professional learning communities, authored and delivered many professional learning opportunities, and managed federal and state program budgets for school-wide programs. Her efforts resulted in increased student achievement and allowed the district to be removed from a Title I "needs improvement" status. This work also increased the learning of students with disabilities in the district through a focus on literacy.

Prior to joining FourPoint, Dr. Wehmeyer served as a school and district improvement specialist at the Kansas State Department of Education providing technical assistance to low-performing schools and districts. She led root cause analysis work in districts to identify effective use of Title program dollars, improve processes and procedures to support student learning, and guide program development and leadership decisions for school turnaround. Moreover, she utilized improvement science research to support sustainability of initiatives. She has authored many handbooks and tools to support educator understanding of Title I school improvement processes and school turnaround models.

Dr. Wehmeyer developed a training and delivery model to support district and state implementation of college- and career-ready standards. Implementation resources included needs assessments to determine district readiness and guide the planning process and on-line clearinghouse of vetted instructional supports for ELA/literacy and math, teacher and principal professional development, and parent communication. Partnering with districts, Dr. Wehmeyer created instructional frameworks, professional development plans, classroom observations tools and protocols, and professional learning community structures to support student success in college, career and life. Most recently, her work includes support to schools and districts seeking evidence-based practices related to MTSS.

“It’s been clear throughout their engagement that FourPoint understands school district cultures, including the role of the central office as a school service entity. The team understood the political and social interplay that goes hand in hand with a superintendent’s job. They understood how to leverage district and other resources to support principals as they look at effective practices that improve student achievement. Finally, their understanding of community proved to be invaluable when dealing with our parents, school board, nonprofits, and other key stakeholders. The team displayed forthrightness, commitment to implementation, and can relate to people on many levels. Skillful, dedicated and visionary, the FourPoint team garners my unequivocal support and recommendation.”

—Dr. Tawana Grover, Former Superintendent of Grand Island Public Schools, Current Superintendent of Cedar Rapids Public Schools (IA)

VIII. Potential Conflicts of Interest

FourPoint Education Partners is committed to providing an independent, objective, and unbiased review of Westport Public Schools' special education programs. In accordance with the requirements of the RFP, we certify the following regarding potential conflicts of interest:

- **Past or Present Relationships:** FourPoint Education Partners, including our principals, proposed project team members, and employees, have not had any contractual, financial, or personal relationships with Westport Public Schools, its Board of Education members, or members of the District Administration within the past five years.
- **Independence of Review:** We are not aware of any other factors, affiliations, or financial interests that could reasonably affect the independence of our program review, nor are there any circumstances that would give rise to a conflict of interest or the appearance of a conflict of interest in executing this scope of work.

“I attribute much of FourPoint’s success to their professionalism, their collaborative approach, and their ability to contextualize the services. The FourPoint team has a tremendous amount of expertise, but they approach the work in a humble way, working collaboratively and respectfully with education leaders while still pushing for excellence. I truly valued the partnership that I had with them during my tenure in Kansas, and strongly recommend them to any school system.”

—Diane DeBacker, Former Kansas State Superintendent

IX. Timeline and Project Management

FourPoint proposes a comprehensive five-month work plan designed to deliver rigorous findings while remaining flexible to the operational realities of WPS. Assuming an anticipated project kickoff of November 2, 2026, the following milestone calendar outlines our process through final Board presentation in March 2027. Figure 8, below, provides a summary of the timeline in Gantt-chart form.

Month 1: Project Initiation & Instrument Adaptation (November 2026)

- **Week 1:** Conduct official kickoff meeting with District leadership to finalize review questions, data requests, and confidentiality protocols.
- **Weeks 2–3:** FourPoint adapts and submits draft family/staff survey instruments, interview/focus group protocols, and the customized Focus Classroom Walkthrough (FCW) observation rubric.
- **Week 4:** District reviews and approves all instruments and protocols. FourPoint submits initial document and data requests.
- **Quality Control Checkpoint 1:** Finalization of data-sharing and confidentiality agreements prior to any transfer of student data.

Month 2: Data Collection & Survey Administration (December 2026)

- **Weeks 1–3:** Launch districtwide family and staff surveys (coordinated with District communications). Monitor response rates in real-time.
- **Weeks 2–4:** Receive and begin processing initial datasets, IEP records, and District documents. Work with the District liaison to schedule January onsite visits.
- **Communication Cadence:** Bi-weekly virtual status updates begin with the District liaison.

Month 3: Onsite Engagement & Deep Analysis (January 2027)

- **Weeks 1–2:** Conduct the four-day onsite visit. Conduct 40+ classroom observations across all nine schools and the Connections program. Conduct 15 focus groups and 10 stakeholder interviews.
- **Weeks 3–4:** Close surveys and begin quantitative and qualitative coding. Complete the structured rubric review of 75-90 IEPs.
- **Quality Control Checkpoint 2:** Observer calibration and norming session prior to onsite visits to ensure inter-rater reliability.

Month 4: Triangulation & Emerging Findings (February 2027)

- **Weeks 1–2:** Triangulate survey data, observation metrics, IEP audit results, and benchmarking/financial data.
- **Week 3:** Conduct an Interim Leadership Briefing with WPS leadership to discuss emerging themes, clarify data outliers, and test the feasibility of initial recommendations.
- **Week 4:** Submit the Draft Final Report (PPT) for the District's factual review.

Month 5: Finalization & Presentation (March 2027)

- **Weeks 1–2:** District returns factual corrections. FourPoint finalizes the report, ensuring independence of professional judgment.
- **Week 3:** Facilitate an initial action-planning or leadership working session to support prioritization.
- **Week 4:** Present the Final Report (PPT) and Executive Summary (PPT) to Board of Education. Transfer all required non-proprietary data files to the District.

Project Management Dependencies and Risk Mitigation

- **Dependencies:** To maintain this timeline, FourPoint assumes a turnaround time of 5–7 business days for District review of draft instruments and the draft final report. We also rely on the District to distribute survey links and assist with scheduling interviews, focus groups, and observations.
- **Risk Management (Survey Participation):** If survey response rates fall below statistically significant thresholds, we will deploy targeted reminders, offer paper formats, and work with building administrators to encourage participation, extending the survey window if necessary. Surveys will be administered in different languages per District recommendation.
- **Risk Management (Scheduling Delays):** Should weather or school closures delay onsite visits, our flexible staffing model allows our four-person team to quickly reschedule without extending the overall project deadline beyond the required 4–6 month window.

Figure 8. Special Education Program Review Timeline | Nov '26–Mar '27

Project Phase & Task	Month 1 Nov '26	Month 2 Dec '26	Month 3 Jan '27	Month 4 Feb '27	Month 5 Mar '27
I. Project Initiation & Design					
Kickoff Meeting & Finalize Scope	■				
Adapt Survey & Observation Instruments	■				
District Approval & Data Request					
II. Data Collection & Surveys					
Administer Districtwide Surveys		■			
Process Initial Data & Schedule Visits		■			
III. Onsite Engagement & Deep Analysis					
Onsite Visit (Observations & Focus Groups)			■		
Close Surveys & Qualitative Coding			■		
IEP Record Review & Auditing			■		
IV. Triangulation & Emerging Findings					
Triangulate Data & Benchmark Analysis				■	
Interim Leadership Briefing				■	
Submit Draft Final Report (PPT) for Review				■	
V. Finalization & Presentation					
Address Factual Corrections & Finalize					■
Action-Planning Leadership Session					■
Board of Education Presentation					■

X. Deliverables

FourPoint will produce the following deliverables, each aligned with the requirements of Section 9 of the RFP.

1. Final Project Work Plan & Logistics

- **Content:** Final review questions, detailed schedule, communication plan, data request, and confidentiality/data-management plan.
- **Format/Timing:** PDF Document; Delivered Month 1.
- **Lead Personnel:** Dr. Scott Joftus and Sharon Deich.

2. Survey Instruments & Response Plans

- **Content:** Approved family and staff survey instruments, administration plans, and response-rate strategies.
- **Format/Timing:** PDF Document; Delivered Month 1.
- **Lead Personnel:** Dr. Joftus and Sharon Deich.

3. Stakeholder Engagement Plan:

- **Content:** Sampling rationale, focus group/interview protocols, and aggregate synthesis of qualitative findings (delivered later).
- **Format/Timing:** PDF Document; Delivered Month 1 (Plan) and Month 4 (Synthesis).
- **Lead Personnel:** Valda Valbrun.

4. Site-Visit & Observation Plan:

- **Content:** Structured protocol (FCW tool), sampling rationale for 40+ observations, and aggregate synthesis.
- **Format/Timing:** PDF Document; Delivered Month 2 (Plan) and Month 4 (Synthesis).
- **Lead Personnel:** Dr. Mary Ann Dewan and Dr. Connie Wehmeyer.

5. IEP/Record-Review Methodology

- **Content:** Sampling methodology, evaluation rubric, quality assurance procedures, and aggregate findings.
- **Format/Timing:** PDF Document; Delivered Month 2 (Plan) and Month 4 (Findings).
- **Lead Personnel:** Dr. Alice Parker.

6. Interim Leadership Briefing

- **Content:** Preliminary findings presentation or memorandum identifying emerging themes and data limitations.
- **Format/Timing:** Virtual Presentation and Slide Deck; Delivered Month 4.
- **Lead Personnel:** Dr. Joftus.

7. Draft Final Report:

- **Content:** Complete draft of the final report submitted strictly for factual review and contextual clarification by the District.
- **Format/Timing:** Editable Document/PDF; Delivered Month 4.
- **Lead Personnel:** Dr. Joftus and Dr. Dewan.

8. Final Report:

- **Content:** Comprehensive report including an executive summary, methodology, data sources, findings, strengths, areas for improvement, limitations, appendices, and prioritized recommendations.
- **Format/Timing:** Accessible PDF and Editable Document; Delivered Month 5.
- **Lead Personnel:** Dr. Joftus.

9. Board of Education Presentation:

- **Content:** High-level, public-facing summary of systemic findings and prioritized recommendations.
- **Format/Timing:** Slide Deck (PPT) and In-Person/Virtual Presentation; Delivered Month 5.
- **Lead Personnel:** Dr. Joftus.

10. Data Files & Instruments:

- **Content:** All non-proprietary project data files, qualitative coding frameworks, and final survey findings reports.
- **Format/Timing:** Excel/CSV files and PDF; Delivered Month 5.
- **Lead Personnel:** Dr. Joftus and Sharon Deich.

Proprietary Tools and District Use Rights

The Focus Classroom Walkthrough (FCW) and underlying rubrics utilized during the onsite observations are proprietary to FourPoint. While FourPoint retains ownership of the FCW, WPS will be granted full, unrestricted, and perpetual use rights to all aggregated data, analysis, and custom observation protocols generated specifically for the District during this engagement. The custom survey instruments, interview protocols, and all final reports will be considered non-proprietary and fully owned by the District upon project completion.

“FourPoint has been a wonderful partner. Their team is made up of experienced, thoughtful educators who have served in almost every capacity in public education. This experience, I believe, gives them the understanding that there is no silver bullet in education but rather that improvement takes focus, effective coaching, content expertise, capacity building, and outstanding performance management.”

—Sharon Gaskins, Former Deputy Assistant Superintendent, DC Office of the State Superintendent of Education

XI. Data Privacy and Security

FourPoint understands the extreme sensitivity of special education records and adheres to rigorous, FERPA-compliant data security protocols throughout the lifecycle of the engagement. Our comprehensive approach to data privacy includes the following safeguards:

- **Data Storage, Transfer, and Encryption:** All data is encrypted in transit and at rest. We utilize secure, compliant cloud environments and require that all exchanges occur via a secure portal. Sensitive data or personally identifiable information is never transferred via email.
- **Access Controls and Role-Based Permissions:** Access to District data is granted exclusively on a strict "need-to-know" basis using role-based permissions. Only authorized project personnel actively assigned to the Westport review will have access to the data.
- **De-Identification:** Upon data receipt, PII is separated from analytical datasets and replaced with unique, randomized identifiers. The crosswalk key linking these identifiers to specific student records is stored separately in a highly restricted environment.
- **Suppression:** In all deliverables, public reports, and presentations, we apply strict data suppression rules for small sub-populations to ensure individuals cannot be identified.
- **Survey Confidentiality and Anonymity:** For all surveys, data is collected using secure platforms that intentionally decouple identifying metadata from substantive responses. All survey communications will explicitly outline these confidentiality assurances, guaranteeing respondents that individual, identifiable responses will never be shared with District administration.
- **Incident Response:** In the unlikely event of a suspected or confirmed data breach, FourPoint maintains strict internal incident response protocols and will notify the designated District liaison immediately, complying with all state and federal breach notification laws.
- **Retention and Destruction:** District data is retained only for the duration necessary to fulfill the project deliverables. Upon project completion or the expiration of the agreement, all data is permanently and securely wiped in accordance with industry standards.
- **Subcontractor Controls:** FourPoint will execute this entire scope of work using our own highly qualified personnel; we will not use subcontractors for this review.
- **Data-Sharing Agreements:** FourPoint has extensive experience successfully executing customized Data-Sharing Agreements and Memoranda of Understanding with local education agencies across the country. We will collaborate proactively with Westport's legal and IT teams to establish clear terms regarding authorized use, liability, and strict compliance with FERPA and Connecticut state data privacy laws prior to any data transfer.

XII. Exceptions and Assumptions

FourPoint Education Partners is fully committed to executing the scope of services as outlined in RFP #27-003-RFP.

Exceptions

FourPoint takes no exceptions to the mandatory proposal commitments, the base scope of services, or the general conditions outlined in the RFP.

Assumptions and Required District Resources

To successfully complete this comprehensive review within the required four- to six-month timeline, our proposal is based on the following assumptions regarding District resources and collaboration:

- **Project Liaison:** The District will designate a primary project liaison who will provide timely access to leadership for project decisions and assist in coordinating building access for the onsite visits.
- **Data Access:** The District will provide timely access (via the approved data-sharing process) to the requested student-level and aggregate data, IEP records, staffing information, financial/outplacement data, policies, procedures, and program materials.
- **Scheduling Assistance:** The District liaison will assist with scheduling District-approved interviews, focus groups, observations, and student/family engagement sessions.
- **Survey Distribution:** The District will distribute District-approved survey and engagement communications through its official channels to maximize reach and response rates.
- **Review Turnaround Times:** To maintain the proposed timeline, FourPoint assumes the District will review draft instruments, schedules, and the draft final report within an agreed-upon turnaround time of 5–7 business days.
- **Scope Boundaries:** As outlined in the RFP, FourPoint assumes this engagement is strictly a system-level program effectiveness review. We will not be expected or authorized to investigate individual student or personnel disputes, serve as legal counsel or compliance monitors, or conduct full forensic accounting or ADA/facilities audits.

Special Education Program Review #27-003-RFP

I. Cover Letter and Certification

August 27, 2026

Tom Scarice, Superintendent
Elio Longo, Chief Financial Officer
Westport Public Schools
110 Myrtle Avenue
Westport, CT 06880

Dear Superintendent Scarice and Mr. Longo,

New Solutions K12 is pleased to respond to RFP #27-003-RFP for Special Education Program Review. This proposal covers conducting a comprehensive, independent, system-level review of the District's PK-12 special education programs and services, including transition and 18-22 programming. It will directly and specifically answer all of the guiding review questions. This is precisely the work our firm was built to do, and we are confident that no team is better positioned to help Westport Public Schools answer the questions at the heart of this review. There have been no substantive changes to New Solutions K12 since the submission of our qualifications.

We bring extensive experience conducting reviews of exactly this kind. I have personally led over 300 special education program reviews across 30 states over the past 18 years. More importantly for Westport, we have deep and ongoing experience working with Connecticut districts. We have partnered with more than 40 Connecticut communities, including recent reviews in Branford and Vernon, and have worked directly with the Connecticut State Department of Education to improve special education outcomes statewide. We understand the Connecticut landscape — its data systems, regulatory requirements, and the realities facing districts like Westport — in ways that few firms can match.

Equally importantly, we have a track record of earning the trust of parents, staff, school boards, and senior leaders, all at the same time.

What distinguishes New Solutions K12 is not just our experience conducting reviews, but our track record of actually improving outcomes. As superintendent in Arlington, MA, I oversaw efforts that reduced the special education achievement gap by 40 points and cut the number of struggling readers K-5 by 68%. As a consultant, our team helped lead a multi-year statewide effort in Louisiana that produced the most growth in the history of IDEA, moving the state from 49th to 22nd in the nation. A number of our client districts have been independently identified as among the highest-performing in the country relative to their demographics. We do transformational work, grounded in the belief that dramatically better outcomes for students with disabilities are achievable in virtually every district.

Our approach is also designed to be cost-effective and to reduce, not add to, the stress on teachers and staff. The best special education systems are not the most expensive ones; they are the ones most thoughtfully designed. We bring that perspective to every engagement, and we look forward to bringing it to Westport.

This proposal accepts all mandatory proposal commitments.

This proposal remains valid for 120 days past the bid due date.

Sincerely,

Nate Levenson

President of New Solutions K12

II. Understanding of Westport and Proposed Review Questions

Our Understanding of Westport

Westport Public Schools is seeking an external partner to conduct a comprehensive, system-level review of its PK-12 special education programs and services. The district's core question is whether its existing continuum of supports — spanning early intervention, inclusive settings, resource and intensive services, behavioral and mental health supports, related services, and transition/18-22 programming — is appropriately aligned to student needs, consistently implemented across schools, and producing meaningful outcomes. Importantly, this review is distinct from a state-led compliance monitoring process; the district wants a deeper look at program effectiveness and student experience, not just procedural adherence. We will place extra emphasis on areas raised by the community, including family satisfaction and communication; IEP service-delivery fidelity; outplacement criteria, trends, and costs; resource allocation; early identification and intervention; cross-school consistency; training and support for paraeducators and other staff; mental-health and behavioral supports; access to classes, electives, extracurricular and nonacademic opportunities; and transitions across levels. We will directly and specifically answer all of the guiding review questions.

The scope of work is broad and multi-method. Our review will examine IEP service delivery and alignment with least restrictive environment principles, early identification and MTSS/RTI pathways, outplacement trends and in-district capacity, resource allocation and spending patterns, staffing models, achievement and growth patterns for students with disabilities relative to their peers, and access to academic and extracurricular opportunities. The work would also include onsite school visits and classroom observations across all school levels and program types, focus groups with administrators, teachers, paraeducators, and families, the design and administration of districtwide family and staff surveys, and a final presentation of findings to the Board of Education. Community feedback has specifically highlighted concerns around IEP fidelity, cross-school consistency, paraeducator training, and the criteria driving outplacement decisions.

Why New Solutions K12 Is the Right Partner

New Solutions K12 is uniquely well qualified to conduct this review. It is the primary work of our company, and we are well known across the state and the country for this type of work.

New Solutions K12 brings exceptional depth and breadth of experience to a special education program review of the kind the district is seeking. The firm's project lead, Nate Levenson, has personally conducted over 300 similar reviews across 30 states, and the team as a whole has worked with more than 40 Connecticut districts, including recent reviews in Branford, Vernon, and other Connecticut communities. In the last 12 months, we have worked with 3 very similar districts in Massachusetts (Lexington, Newton, and Wellesley), serving high-income communities with top-tier school systems, but also with some concerns from parents of students with disabilities. We have also partnered with the Connecticut State Department of Education to improve special education in Hartford and to improve special educator work life statewide. Levenson is also a recognized national thought leader in this space — author of *Six Shifts to Improve Special Education and Other Interventions* (Harvard Education Press), a book widely used to train special educators and administrators, and a keynote presenter at CONNCASE and more than 100 other conferences nationwide. His personal experience as a student with disabilities before the passage of IDEA adds an uncommon perspective to this work. The team also includes a member with extensive special education leadership experience. Danna LaCaze led her district's efforts to be one of the fastest-improving districts in the nation, including record-setting growth for students with disabilities.

We have followed the discussions concerning the proposed special education review. Much of the conversation seems to focus on ensuring that the review is transparent and unbiased. Some parents of students with disabilities have expressed a desire to be involved in the process in a number of ways.

New Solutions K12 is uniquely suited for this situation:

1. Project lead, Nate Levenson, brings firsthand experience to this work from all perspectives. He has been:

- A child with a number of mild to moderate disabilities
- A school board member
- A district superintendent

Nate brings empathy and experience for all perspectives.

2. New Solutions K12 is respected by special education advocates and district leaders alike. Our work over the years has been praised by both families of students with disabilities and school system leaders, because we don't "take sides" but objectively put the needs of students first.

We are pleased to share 3 references from special education advocacy organizations:

Liz Zogby
Co-Chair, Maryland Down Syndrome Advocacy Coalition

Co-Chair, Maryland Special Education Working Group
katzogby@gmail.com

Andrew Feinstein
Founder, Special Education Equity for Kids in Connecticut (SEEK-CT)
feinsteinandrew1950@gmail.com

Lauren M Rhim
Co-Founder of the Center for Learner Equity, a disability rights organization
lmrhim@centerforlearnerequity.org

At the same time, we have been hired at the request of hundreds of superintendents and are regularly invited to speak at state and national superintendents conferences, including in Connecticut.

3. We have direct experience in building alignment on a path forward and trust for improving special education in low-trust environments.

The state of Maryland set out to bring the Department of Education, special education advocates, and school district leaders together to assess the current situation statewide for serving students with special needs and for charting a path forward. From the outset, there was limited trust, much frustration, and a growing concern that the findings would not be widely supported. New Solutions K12 was asked to step in and help redesign the process and co-facilitate the work. By the end, most members, district leaders, and advocates alike described the work as the best of its kind ever experienced by a very experienced membership, and a clear and widely supported plan forward was developed. Ms. Zogby, referenced above, co-chaired this work.

The New Solutions K12 methodology is comprehensive and well-matched to what Westport is asking for. Our process includes structured document review, analysis of student placement and achievement data, including achievement and growth gaps between students with disabilities and their peers, classroom observations across the full continuum of settings, and in-depth focus groups and interviews with administrators, teachers, related service providers, paraeducators, and families — typically engaging in person around 100 - 150 stakeholders per review, plus many more via survey. The team will also design, administer, analyze, and report districtwide surveys of both families and staff. The team will also conduct benchmarking against national best practices, including What Works Clearinghouse, the Science of Reading, and peer districts, and can analyze how staff time is actually being used across roles. The review culminates not just in a written report but in interim leadership briefings, a draft report for factual review, facilitated planning sessions to help the district translate findings into action, and a final presentation to the Board of Education.

The team itself reflects a strong combination of practitioner experience and analytical rigor. Beyond Levenson — who served as superintendent in Arlington, MA, where he cut the special education achievement gap by 40 points and reduced struggling readers K-5 by 68% — the team includes David James (former teacher, middle school co-director), Caitlin Varys (former teacher, instructional coach), and Danna LaCaze, a Director of Special Education in who led her district to

top growth in her state for four consecutive years. Together, the team combines firsthand leadership experience in special education with the data analysis and project management skills needed to deliver a review of the scope and complexity Westport is envisioning.

Mandatory Commitments

New Solutions K12 commits to all the mandatory proposal commitments per the RFP, specifically:

- Completion of the full review, final report, and presentation within four to six months from kickoff. Respondents can identify contingency plans to address if the review extends beyond this timeline.
- Design, administration, analysis, disaggregation, and reporting of a districtwide survey of all families of students with disabilities and a districtwide survey of staff who teach, support, supervise, or make decisions affecting students with disabilities.
- Onsite visits and observations that cover all school levels and all major program types, including specialized and transition/18-22 programming where applicable.
- Interviews, focus groups, or listening sessions with a balanced set of central office leaders, school administrators, special education and general education teachers, related service providers, paraeducators, mental-health/behavior staff, students where appropriate and approved, and families.
- Assignment of named key personnel, including at least one individual with substantial special education leadership experience; key personnel substitutions require prior District approval.
- FERPA-aligned data handling, aggregate/de-identified reporting, and findings focused on system patterns rather than individual cases or personnel.
- A final report, executive summary, Board of Education presentation, and prioritized recommendations,
- A complete, transparent fee proposal submitted separately from the technical proposal.

Proposed Review Questions

We will also directly and specifically answer all of the guiding review questions.

1. To what extent is the District's PK-12 continuum of services, including transition/18-22 programming, sufficient, consistently understood, and aligned to student needs?
2. To what extent do early intervention, MTSS/RTI, referral, evaluation, IEP development, placement, and progress-monitoring practices support appropriate and timely services?
3. To what extent are services and supports described in IEPs implemented consistently and effectively at the system level?
4. How effectively does the continuum support LRE, inclusion, access to curriculum and extracurricular experiences, and student progress?
5. What patterns are evident in academic, behavioral, social/emotional, graduation, and transition-related outcomes?

6. 6. What trends and gaps are evident over time between students with disabilities and students without disabilities in academic achievement and growth, and what measures does the District use to determine grade-level progress or mastery and communicate progress to families?
7. How do students, families, educators, providers, paraeducators, administrators, and other stakeholders experience the system? How do these stakeholders experience the system if/when there is a disagreement with a proposed program or placement?
8. What factors contribute to outplacement, and where may opportunities exist to strengthen in-district capacity while preserving individualized decision-making?
9. How effectively are staffing, professional learning, time, services, spending, and other resources aligned to student needs and outcomes?
10. What actionable, prioritized changes should the District consider in the short, medium, and longer term?

We believe the guiding questions are appropriate to provide the insights and direction the district seeks to improve outcomes for students with disabilities, to serve students in the Least Restrictive Environment, to improve the work life of staff, and to do all of this in a cost-efficient manner.

Best Practices Show The Way

Many students struggled during the pandemic, and unfortunately, many continue to struggle after. Districts are challenged to address learning loss and trauma. The good news is that clear best practices exist for improving services for students with special needs and students who struggle. Some districts regularly see 18 to 24 months of academic growth from students with IEPs, others have reduced the number of struggling readers by 2/3^{rds}, and some have reduced students dropping out by more than half.

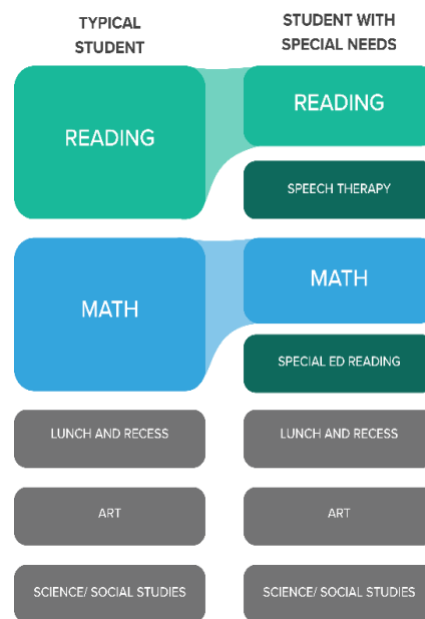
These best practices, practical implementation lessons, and many success stories have been documented in my book, *Six Shifts to Improve Special Education and Other Interventions*. These ideas have been widely embraced by both general and special education leaders and staff across the country. They are the foundation of new guidance in many states and have been endorsed by state special education associations as well. These best practices include:

Focus On Core Instruction

Students with mild to moderate disabilities benefit greatly from receiving 100% of core instruction, highly engaged classroom teachers, and additional services on top of, not instead of, general education instruction. Students with disabilities, however, often receive less core instruction and less attention from their skilled classroom teacher than students who don't struggle. This happens because, too often, students are pulled from math or reading in order to get IEP-mandated services. These services are best provided at other times during the school day.

Extra Time To Learn

Not all students learn at the same pace. Some will need more time to catch up. For students struggling with prior grade-level knowledge gaps, extra time to fill in this missed learning is doubly important. Post-pandemic, this need is magnified. As DuFour aptly noted, “Learning should be the constant, and time the variable.”



Content Strong Teachers

Who is in the front of the class matters greatly. Students with disabilities deserve teachers with deep expertise in the content they are teaching. Anything less is unlikely to close the stubborn achievement gap. Special education teachers and special education paraprofessionals are great, but like all of us, they aren't great at everything. Research is clear: nothing matters more in raising achievement than the skills of the teacher. For catching up academically, a commitment to content strong instructors is key.

Social, emotional, and behavioral supports are key to personal and academic success. They are an important focus area of the review as well. In conversation with school and district leaders, improving and expanding social, emotional, and behavioral supports for students is at the top of their to-do list.

As districts continue to focus on improving mental health and behavior supports, best practices can help. This includes:

Don't Conflate Social-Emotional Learning Competencies with Behavior Challenges

While social-emotional learning competencies like grit and empathy, are critical components of developing a complete child, it is important not to conflate these with addressing behavior challenges. Both are equally important, and they overlap as well. But for many teachers, getting help addressing classroom outbursts and extreme behaviors is priority number one. Teacher stress over the growing intensity of problematic behaviors is forcing too many out of the profession. Their

frustration grows to anger when social-emotional efforts are launched without clarity of focus. Social-emotional learning is a wide brush covering many topics. Too often, front-line staff assume these efforts will address problematic Tier 3 behaviors, when that wasn't the primary focus at all.

Create Authentic Student Teacher Relationships

The pandemic led many students to feel disconnected and to wonder why school matters. While nearly all schools have worked hard to build a welcoming climate, to create advisory periods, and other strategies to forge bonds between students and staff, still too many kids feel lost, invisible, or unimportant. Fortunately, a more structured approach based on shared interests and authentic encounters can help.

Measure Effectiveness: Know What's Working and What Needs To Be Tweaked

It's impactful to measure where an effort is working, and where it is not. Sometimes a great effort shines in one school but not in others, or in one classroom but not another. Gathering feedback from students, tracking progress, and rigorously measuring mental health and behavior results, just like academic results, can help supercharge current efforts.



III. Methodology and Work Plan

New Solutions K12 has developed a comprehensive approach for identifying high-impact opportunities to improve services for students who struggle both with and without IEPs all while making the work of teachers more sustainable.

3a. Build A Collaborative Team

Since it is a shared responsibility to serve students who struggle both with and without a disability, it's best if this review is also a shared responsibility. It will take a team of general education and special education, of school leaders and central office, and of teachers and administrators to improve the lives and outcomes of students who struggle, with and without IEPs.

The work begins by communicating a message of teamwork and cross functional collaboration. To facilitate managing the change process, we recommend establishing a guiding coalition that includes district and school leaders, others as appropriate and includes representation from all levels. District leadership will help determine membership in the guiding coalition.

This important group will ensure that the values and priorities of the district are at the core of the review and the path forward. The coalition will serve as a sounding board for initial recommendations, will aid the district leadership team in planning for implementation, and most importantly, will provide invaluable two-way communication with key stakeholders including parents once the district begins to implement any new approaches.

3b. Provide Best Practices Professional Development

The guiding coalition will receive professional development in best practices for raising achievement for students who struggle, with and without IEPs. This interactive session can be joined by a wider group of school and district leaders.

By sharing what the research teaches and the experiences of other gap closing districts, participants will have a better sense of possible paths forward. The pandemic caused much learning loss for all students and especially for students with disabilities. This session will share three common sense, yet not commonplace, strategies for catching students up academically. Pre-pandemic, this approach helped close the general education–special education achievement gap by 40 points in some districts and drove 2 years of growth in a year in others. It’s what many kids need post pandemic.

The session will address:

- What actually raises achievement for students who struggle
- How to ensure students with disabilities receive high quality core instruction
- Why extra time to learn will be critical
- How to find time in the schedule for extra help
- Who is the most appropriate staff to provide extra help in reading, writing and math
- Ways to reduce general education and special education staff stress and burnout
- Leading edge approaches to behavior management and support
- Realistic approaches to providing high levels of services after ESSER funds end

3c. Understand Current Practices

We will conduct a deep review of current practices in the district. This begins with a systematic review of the district’s services, programs, procedures, schedules and staffing as it relates to special education, some aspects of general education, and mental health and behavior supports. To gain a comprehensive understanding of current practices, **New Solutions K12 will:**

- Review existing strategic plans, prior studies, and other written documents.

- Host small group, in-person and remote interviews with approximately 100 people representing a wide range of roles and responsibilities.
- Visit classrooms
- Survey families and staff
- Collect data on student placement, achievement, and spending.

Electronic spreadsheets are provided to assist the district in collecting the needed data. Detailed staffing and program information, but never personally identifiable student data, is collected and analyzed.

The research covers a wide range of topics. Major focus areas include:

- Academic performance of students with and without special needs
- Academic programming and teaching practices for students who struggle, both general education and special education offerings
- Services and strategies for supporting students with challenging behaviors
- Disproportionality of identification, services and discipline
- Attendance and discipline trends
- Staffing levels, by type of staff
- Staff perspectives on program effectiveness, organizational structure, professional development, and district support
- Role of paraprofessionals.
- Numbers of students identified for special education services, by disability
- The prevalence and effectiveness of serving students with disabilities in the general education setting

Family and Staff Survey

Surveys give every family and every staff member a chance to weigh in, not only those who take part in a focus group or interview. New Solutions K12 will design, administer, analyze, and report two districtwide surveys: one for all families of students with disabilities, and one for staff who teach, support, supervise, or make decisions affecting students with disabilities. Both are developed in partnership with district leaders so the questions reflect what matters most in Westport.

The surveys will explore the areas most central to this review, including:

- Communication and responsiveness
- Family experience with the IEP and PPT process
- Perceived effectiveness and consistency of services
- Access to supports and inclusion in general education settings

- Mental health and behavioral supports
- Transitions across levels and into 18-22 or postsecondary pathways
- Access to academic and nonacademic opportunities
- Overall satisfaction

Each survey pairs closed-ended questions with open-ended prompts so respondents can share detail in their own words. Open responses are coded through a consistent, documented process with quality-control checks so the themes reflect what respondents actually said.

Strong participation is essential to a survey that reflects the full community. We use advance communications, reminders, accessible and mobile-friendly formats to encourage broad response. Results are disaggregated by school level, staff role, and other relevant categories, subject to minimum group sizes that protect confidentiality.

We report survey results plainly, including the number of invitations sent, completed responses, response rates, and the limitations of the data. Where the evidence supports it, we identify districtwide patterns; where participation is thin, we say so rather than overstate what the data can support. Findings are reported in aggregate and de-identified form and are used to surface system-level themes, not to resolve individual concerns.

Understand How Staff Use Their Time

We can, if desired, also review how key staff members use their time. This is helpful in understanding the many demands on special educators and others. The data can help lead to ways to make the work more manageable, rewarding and sustainable.

The use of time analysis will provide insights on:

- How much time is spent directly with students each week
- How much time is spent on activities such as paperwork or meetings
- If time can be utilized differently or more efficiently and effectively such that staff spend more of their time providing services to students
- How much service is one-on-one, small group, or whole class
- If social, emotional, and behavioral supports can be expanded

This portion of the study is achieved by utilizing a simple to use tool that allows selected roles to share their schedule for a week. Staff such as interventionists, reading teachers, special educators, related service providers, school psychologists, social workers, counselors, instructional coaches and paraprofessionals upload how they spent their time in a typical week. No personally identifiable data is collected. The district leadership will decide which, if any, roles will participate.

Sample Use of Time Charts

Table 1: Time Spent with Students

Role	% Of Work Week Spent with Students
Special Education Staff	
Special Education Resource Room Teacher	57%
School Psychologist	6%
Speech Language Pathologist	52%
Occupational Therapist	47%
Special Education Teacher Consultant	35%
General Education Staff	
Literacy Specialist	44%
Interventionist	56%
Math Specialist	40%
Counseling Staff	
Social Worker	36%
School Counselor	41%
Other Certified Staff	
ELD Specialist	54%
Non-Certified Staff	
Student Support Aide	83%
Special Education Paraprofessional	84%
1:1 Paraprofessional	74%

Table 2: Time Spent With Students by Group Size

Role	% Of Time Spent With Students			
	1:1	2-4	5-8	9+
Special Education Staff				
Special Education Resource Room Teacher	21%	31%	25%	23%
School Psychologist*	83%	17%	0%	0%
Speech Language Pathologist	30%	54%	12%	5%
Occupational Therapist*	34%	31%	35%	0%
Special Education Teacher Consultant	49%	45%	3%	3%
General Education Staff				
Literacy Specialist	75%	12%	8%	5%
Interventionist	2%	6%	65%	26%
Math Specialist	44%	22%	2%	32%
Counseling Staff				
Social Worker	47%	31%	15%	7%
School Counselor*	25%	24%	4%	47%
Other Certified Staff				
ELD Specialist	9%	55%	21%	15%
Non-Certified Staff				
Student Support Aide	60%	31%	9%	0%
Special Education Paraprofessional	19%	28%	41%	12%
1:1 Paraprofessional*	27%	59%	13%	2%

The work will also consider a number of staffing issues, including:

- How to make the work more rewarding and sustainable for staff
- How to navigate special education staffing shortages
- How to thoughtfully set staffing levels

This research will help answer key questions, such as:

- What service delivery models are used, and are they consistent across the district?
- How do current service delivery models compare to best practices?
- What role do paraprofessionals play in each school?

The review also looks at systems and procedures, including:

- IEP referral process and IEP determination methodology
- Integration of special education with RTI (Response to Intervention)/MTSS (Multi-Tiered System of Supports)

- Special education organizational structure, reporting lines and clarity of roles, responsibilities and decision making
- Communication strategy and effectiveness of district communications

Stakeholder Focus Groups and Interviews

We balance data-driven analysis with extensive in-person and remote interviews. The hard data tells only half the story.

Small group interviews with a wide range of stakeholders – both general education and special education, both school and district based, both certified and classified, representing a wide range of roles and responsibilities – will be conducted to gain a deep understanding the district. Each district is staffed and structured differently, so we partner with the district in crafting the stakeholder engagement to provide a full picture.

During this research phase, the district leadership is an active thought partner. The district will help determine which roles should be interviewed, help create the lists of questions to be answered, and manage when staff share their thoughts

Interviews and focus groups will be a mix of in person and remote.

- Most focus groups and interviews are done in small groups of similar roles.
- Groups typically do not exceed six to eight people; smaller groups, when appropriate, are fine as well.

Sample List of Stakeholders Engaged

- Superintendent
- Senior teaching and learning district leader
- Senior financial district leader
- Senior special education district leader
- Other district-wide special education leaders
- Elementary school principals
- Middle school principals
- High school principals
- Building-based special education leaders
- Elementary special education teachers
- Secondary special education teachers
- Leaders of IEP team meetings and IEP referral testers
- Occupational therapists, speech and language pathologists, and physical therapists
- School psychologists
- Behavior support staff
- School counselors
- Social workers

- Special education paraprofessionals
- Elementary teachers
- Secondary classroom teachers
- ELL teachers
- Interventionists, reading teachers and Title 1 teachers
- Parents of students with disabilities
- Members of Parent Advisory Committee (or equivalent)
- School board (optional; must be less than quorum)
- Others, as appropriate

The final stakeholder engagement plan will be developed in partnership with district leaders. Many of these conversations are in fact, preferred by staff and districts to be conducted by Zoom!

Classroom Observations

The New Solutions K12 team will also get a feel for the special programs and supports in place for children with disabilities and other students who struggle. Classroom visits help us create a full and rich picture of the school district's special education program and general education supports. This includes a sampling of programs across the district in elementary, middle, and high levels, such as:

- General education classrooms
- Inclusion classrooms
- Co-taught classrooms
- Resource classrooms
- Intervention classes
- Substantially separate classrooms
- Classes for students with emotional/behavioral needs
- Any other classes the district feels are important in demonstrating how the district serves students

The goal is to visit every school and samples of every type of program at each grade band.

3d. Benchmark to Best Practices

Once a clear picture of current practices has been established, New Solutions K12 will compare district current practices to the best practices. Points of comparison include:

- State and national database of prevalence of identifying students for special needs, in total and by disability

- Recommendations of the *What Works Clearing House*, a leading source for field-proven best practices and other published studies
- Recommendations of the National Reading Panel and The Science of Reading, the preeminent source for reading instruction, especially for students who struggle academically
- John Hattie’s “Visible Learning Effect” size study
- Six Shifts for Improving Special Education and Other Interventions by Nate Levenson (Harvard Education Press, 2020)
- *Lost at School* (Ross Greene) and *The Behavior Code* (Jessica Minahan and Nancy Rappaport)

3e. Create a Short List of Commendations and Opportunities and a Practical Path Forward

Too often, districts dedicated to doing better for their students wind up with lengthy plans that prove too unwieldy to put into action. We believe that great power lies in having a plan tightly focused on a very small set of the most important steps for improving outcomes. A short list is better than a long one.

Our report includes:

- Summaries of best practice research
- Commendations
- A short list of the highest impact opportunities that can help raise student achievement and make the work more sustainable for staff
- Extensive analysis about the district’s current approach, services, and staffing
- Benchmarking of the district’s current approach to best practices and best practice districts

The report is a practical roadmap for a better future.

3f. Begin Planning For Implementation

The value of a review lies in what the district does next. From the outset, our work is designed not simply to document current practice but to give district and school leaders a clear, prioritized path they can act on.

Well before the final report, we keep district leadership informed. New Solutions K12 will provide one or more interim briefings on emerging themes, data limitations, and questions that need clarification. Ahead of the final report, we also share a draft findings memorandum or draft report

for factual review and context. This step improves accuracy and grounding while preserving the independence of our findings and recommendations.

The final report centers on prioritized recommendations rather than a long list of everything that could change. For each major recommendation, we identify:

- The rationale and the supporting evidence
- A suggested priority and implementation horizon
- Key dependencies and anticipated resource implications
- Suggested measures of progress

To help turn findings into next steps, we facilitate at least one action-planning or leadership working session focused on initial prioritization and sequencing. Districts that want continued help putting the recommendations into practice can add ongoing implementation support as an optional service.

New Solutions K12 will present the findings and recommendations to the Westport Board of Education. Our recommendations are advisory. The district and the Board will weigh them in light of student needs, professional judgment, strategic priorities, available resources, collective bargaining obligations, and other relevant considerations. The final report, executive summary, survey summaries, and Board presentation are prepared in an accessible, public-facing format, subject to legally required redactions and applicable confidentiality protections.

IV. Family and Staff Survey and Stakeholder Engagement Plan

The Family and Staff Survey and Stakeholder Engagement Plan are also discussed in the workplan section.

Surveys

New Solutions K12 designs each survey with the district, organized around the domains most central to this review: communication and responsiveness; the IEP and PPT experience; service effectiveness and consistency; inclusion and access to supports; mental health and behavioral supports; transitions; and overall satisfaction. Surveys are administered on a secure, mobile-friendly web platform and are offered in the district's major languages and accessible formats. We encourage strong participation through district communication, reminders, and multiple response windows. Closed-ended items and coded open-ended responses are disaggregated by school level, staff role, and other relevant categories, subject to confidentiality-protective minimum group sizes. Individual responses are never attributed to a person, and results are reported only in aggregate, de-identified form.

Focus Groups and Interviews

We conduct small-group interviews with a broad range of stakeholders, from central office leaders and principals to special and general education teachers, related service providers, paraeducators, and families, along with students where appropriate and approved. Most sessions group similar roles, typically six to eight people, in a mix of in-person and remote formats using consistent protocols aligned to the review questions. The district partners in determining which roles are engaged and how participants are invited, which supports balanced participation across levels, programs, and placements.

Reporting and Identifying Patterns

We report participation plainly, including invitations distributed, completed responses, response rates, denominators, subgroup representation, and limitations, and we assess potential nonresponse bias where feasible. To separate isolated experiences from system-level findings, we triangulate across surveys, focus groups, data, and documents, and report a finding as a pattern only when it holds up across multiple sources.

V. Site Visit and Observation Plan

Site visits are covered in the workplan section.

A team of three (Nate Levenson, Caitlin Varys, and Danna LaCaze) will be on site for up to 3 days to complete the site visits as described.

Coverage, Settings, and Personnel

New Solutions K12 will conduct onsite visits across all levels, elementary, middle, and high, with the goal of visiting every school and sampling every major program type at each grade band. Observation settings include general education, inclusion, and co-taught classrooms; resource and intervention settings; substantially separate classrooms; classes for students with emotional and behavioral needs; and any other settings the district considers important to how it serves students. The onsite team is Nate Levenson, Caitlin Varys, and Danna LaCaze, on site for up to three days.

Observation Approach and Reporting

Our visits are modeled on a principal's walk-through and follow a consistent approach aligned to the guiding review questions, so that what we look for stays the same from classroom to classroom. We are respectful of instruction and ask staff only a few brief questions when the situation allows. The goal is not to evaluate individual students or staff but to sample the range of services and strategies in use across the district. Observation notes are aggregated and triangulated with data, documents, surveys, and interviews, and are reported at the system level in de-identified form.

VI. Data, IEP, Benchmarking and Resource Analysis Plan

The relevant details are also outlined in the workplan section.

Data, Documents, and Analytic Approach

New Solutions K12 reviews existing strategic plans, prior studies, and other written documents, and collects data on student placement, achievement, staffing, and spending. Detailed staffing and program information is gathered through electronic spreadsheets we provide and never includes personally identifiable student data. The analysis is disaggregated by disability, school, and grade band, and examines identification numbers by disability, disproportionality in identification, services, and discipline, attendance and discipline trends, staffing levels by role, and the prevalence and effectiveness of serving students with disabilities in general education settings.

Benchmarking and Resource Analysis

Once current practice is clear, we compare it to best practices and to relevant external reference points, including state and national data on identification prevalence and the research base described in 3d. We also examine how staffing and resources are allocated relative to student needs, drawing on the placement, staffing, and spending data above and through the use-of-time analysis described in 3c.

Achievement and Growth Gaps

A central line of analysis is the gap in achievement and growth between students with disabilities and students without disabilities. As part of this, we look at the measures the district uses to determine grade-level progress or mastery and how it communicates that progress to families.

A Program-Effectiveness Review, Not an Audit

This work stays at the system and program level. We review resource allocation, staffing, and spending patterns to understand how resources connect to student needs and outcomes, but we do not conduct a fiscal, forensic, or budget audit, and we do not make legal or compliance findings about individual cases. Data is reported in aggregate, de-identified form and used to surface system-level themes.

VII. Proposed Team and Level of Effort

The team for this project will be Nathan Levenson, David James, Caitlin Varys, and Danna LaCaze. Full bios are provided in the appendix. They all have sufficient availability to meet the RFP requirements. Nate Levenson will be project lead; Caitlin Varys will be project coordinator. Nate, Caitlin, and Danna will be on site for all in-person work.

We bring extensive experience conducting reviews of exactly this kind. I have personally led over 300 special education program reviews across 30 states over the past 18 years. More importantly for Westport, we have deep and ongoing experience working with Connecticut districts. We have partnered with more than 40 Connecticut communities, including recent reviews in Branford and Vernon, and have worked directly with the Connecticut State Department of Education to improve special education outcomes statewide. We understand the Connecticut landscape — its data systems, regulatory requirements, and the realities facing districts like Westport — in ways that few firms can match.

Equally importantly, we have a track record of earning the trust of parents, staff, school boards, and senior leaders, all at the same time.

What distinguishes New Solutions K12 is not just our experience conducting reviews, but our track record of actually improving outcomes. As superintendent in Arlington, MA, I oversaw efforts that reduced the special education achievement gap by 40 points and cut the number of struggling readers K-5 by 68%. As a consultant, our team helped lead a multi-year statewide effort in Louisiana that produced the most growth in the history of IDEA, moving the state from 49th to 22nd in the nation. A number of our client districts have been independently identified as among the highest-performing in the country relative to their demographics.

Nate and Danna are subject matter experts; Caitlin and David design and manage the survey design, collection, and analysis.

VIII. Potential Conflicts of Interest

We have no conflicts of interest and no prior contracts with the district or district administrators in the last 5 years.

IX. Timeline and Project Management

The work will take 4 - 6 months.

Step	Timing
Kickoff and finalization of review questions and protocols	Month 1
Data/document request and receipt	Month 1
Family and staff surveys: design, District review, launch, reminders, close, analysis, and reporting	Month 2 and 3
Stakeholder interviews, focus groups, and student engagement where approved	Month 2 and 3
Onsite school visits and observations	Month 3
IEP/record review and quantitative analysis	Month 3
Triangulation, benchmarking, and emerging-findings review	Month 4
Use of time study	Month 3 or 4
Draft report for factual review	Month 5
Final report and Board presentation	Month 5 or 6

This timeline assumes:

- District provides requested data within 8 weeks of receiving data request
- District helps schedule interviews, focus groups, and classroom visits within 4-6 weeks of request
- The schedule allows an extra 6 weeks to revise outreach for the survey in case of low participation.

X. Deliverables

We will provide all the deliverables outlined in the RFP, plus the following additional deliverables:

- Use of staff time and group size results
- Benchmarking of use of time and group size, along with impact scenarios
- Summaries of best practice research and PD in best practices for improving outcomes for students with disabilities
- Objective assessment of what, if any, support will be needed to effectively implement the recommendations and objective assessment of any likely challenges in implementing the findings.

The time insight data collection tool is developed by New Solutions K12. The district will have ownership of the data, but not the tool. The district will, of course, have ownership rights of all deliverables.

XI. Data Privacy and Security

New Solutions K12 meets all FERPA requirements and has extensive experience maintaining rigorous data privacy protections across hundreds of district engagements. At the core of our approach is a simple but important principle: we never collect personally identifiable information. The data we request from districts — on student placement, achievement, staffing, and spending — is always provided in aggregate or de-identified form. We do not receive, store, or analyze any data that can be traced back to an individual student, family member, or staff member, eliminating the most significant privacy risks at the source.

All data shared with New Solutions K12 is transmitted through secure channels, stored in protected environments with strict access controls, and accessible only to members of the project team directly involved in the engagement. We are happy to execute a data-sharing agreement, nondisclosure agreement, or any other District-approved privacy documentation prior to receiving any district information, and we have done so regularly with districts and state education agencies.

Survey and focus group responses are held in strict confidence. Participants in family surveys and stakeholder focus groups are assured anonymity — no individual responses are attributed to specific individuals in any report or presentation, and comments are aggregated and reported only in ways that protect the identity of the respondent. This confidentiality is not just a procedural

commitment; it is essential to encouraging honest, candid feedback from families and staff, and we treat it accordingly.

Upon completion of an engagement, New Solutions K12 retains only the aggregate, de-identified work products necessary to support the district during implementation. District-provided data is not retained beyond the scope of the project and is destroyed in accordance with agreed-upon protocols. We do not use data from one district engagement in any other context, and we do not share district-specific information with any third party.

XII. Exceptions and Assumptions

We take no exceptions to the RFP.

Please note that project lead Nate Levenson will be out of the country on October 1, the day designated for interviews. Other members of the team can be available.

Appendix: About the New Solutions Team

Nathan Levenson, President

Nate's experience as a superintendent, school board member, consultant, researcher, and private sector CEO allows him to bring a unique perspective to his passion for improving outcomes for students with disabilities. His life's experience as a student with multiple disabilities before the passage of IDEA adds a personal perspective to his work. Nate works closely with superintendents and their leadership teams, Special ed leaders, policymakers, departments of education, and state legislators to create practical solutions to pressing challenges of helping students with special needs. He combines bold thinking, practical insights, and an ability to bring diverse stakeholders together to guide sustained efforts that turn opportunities into realities.

K-12 Consulting

- Partnered with more than 300 districts in 30 states to help raise achievement and improve fairness of both opportunity and outcomes in a cost-effective manner.
- Advised numerous state legislatures and ED on special education reform, weighted funding formulas, and addressing special ed staffing shortages.
- Helped lead pandemic recovery technical support effort for the state of Louisiana.
- Provided extensive training for special education leaders in Connecticut, Massachusetts, Louisiana, and Vermont.

District Superintendent

- Superintendent, Arlington, MA. Oversaw efforts that reduced the high school special education achievement gap by 40 points and reduced the number of struggling readers K-5 by 68%, despite tight budgets.

National Thought Leader

- Author of *Six Shifts to Improve Special Education and Other Interventions*, published by Harvard Education Press, which serves as both a call to action and a critical guide for administrators looking for more effective, affordable ways to close the achievement gap.
- Led a multi-year effort to improve special education across Vermont, which resulted in the passage of sweeping reforms (ACT 173).
- Conducted primary research and authored white papers for Center for American Progress, The American Enterprise Institute, and The Fordham Foundation.
- Author of six books and contributor to two anthologies. Wrote roughly 50 articles in nearly all major K-12 publications, countless blogs and webinars, and Op-Eds in the Washington Post and Wall Street Journal.
- Keynote presenter at more than 100 conferences across the country.

Education:

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

Boards:

- Former Chair, Boxford, MA School Board
- Former Vice President, Merrimack Valley Habitat for Humanity

David James, Managing Director

David brings experience as a teacher, school leader, consultant, and author to his work partnering with educators to improve opportunities and outcomes for students of all backgrounds and abilities. He supports school, district, and state education agency leaders in addressing their most pressing challenges related to special education services and supporting students with special needs, elementary and secondary scheduling, and strategic planning. He combines education and management experience to help clients identify practical, actionable, and sustainable solutions that benefit students and teachers alike.

K-12 Consulting

- Partnered with 15 districts in 7 states to review special education services and practices and identify ways to improve opportunities and outcomes for students of all ability levels and needs.
- Supported pandemic recovery technical assistance effort for the state of Louisiana and worked closely with 15 districts to accelerate learning for students.
- Conducted multi-layered root cause analysis for a large urban school district to identify why ELLs seldom advanced and helped craft a new strategy to improve mastery of English.
- Facilitated creation of 5-year strategic plan for urban school district with 50,000 students and \$1B operating budget.

Professional Experience:

- Director, District Management Group. Advised K-12 schools, districts, and state education agencies in 20+ states on how to raise achievement and improve opportunities and outcomes for students (with and without disabilities) in cost-effective ways.
- Co-Director, UP Academy Oliver Middle School, Lawrence, MA. Managed restart of under-performing middle school and led it to be the fastest improving public middle school in MA, as measured by student growth in math and ELA.
- Middle school science teacher, Boston, MA and Chelsea, MA.
- Management consultant at Blue Cross Blue Shield of Massachusetts.

Education Thought Leader

- Co-author of forthcoming book, *It's Time for Strategic Scheduling: Increase Learning and Lower Costs Through Smarter Schedules*, to be published by Association for Supervision and Curriculum Development (ASCD) in Fall 2022, which will serve as a practical and actionable guide for school and district leaders to schedule more strategically, fairly, and cost-effectively.
- Conducted primary research and supported development of white paper on the topic of effective district budgeting practices for Foundation for Excellence in Education.
- Wrote articles on secondary schedule practices and change management strategies in District Management Journal.

Education:

- BA from Bucknell University
- MEd from Boston University
- MBA with distinction from Babson College

Boards:

- Chair, UP Education Young Professional Advisory Board

Caitlin Varys, Consultant

Caitlin has held a variety of different roles across her career and thus brings a valuable broad perspective to her clients, including in schools as a teacher and school leader, in the education non-profit space, and in the financial industry. Her diverse experiences at different levels in the education space and elsewhere allow her to bring a unique view to the table when working with schools and districts, and enable her to consider and advocate for a wide range of perspectives from all stakeholders. Caitlin brings much passion for improving student outcomes and supporting educators and schools in order to see a world in which all children succeed.

K-12 Consulting Experience

- Partnered with several districts across a variety of states to analyze school and district master schedules, staffing, and enrollment data in order to make cost-effective suggestions for improved student outcomes.
- Assisted multiple state departments of education as well as school districts across the country in the review of their Special Education programming and systems to improve opportunities and outcomes for students of all ability levels and needs.
- Supported a state department of education effort to implement and evaluate the success and impact of high-dose tutoring for students state-wide.
- Co-wrote Staffing & Scheduling Best Practices for a state department of education.
- Applied Academic Return on Investment calculations in combination with reviewing current practices and budgets in order to offer concrete recommendations to revise and fine-tune programming and strategies.

Professional Experience:

- Program Manager for Teach for America - Massachusetts
- New teacher coach and Manager of Teacher Leadership Development for Teach for America – Massachusetts
- Teach for America Alumni Board Member
- Assistant Principal of Operations in a Boston, MA Public School
- High School Math Teacher in a Boston, MA Public School, including general education and replacement special education classrooms
- Trading Assistant in the Securities Lending division for Goldman Sachs
- Trade Settlements and Investment Administration at Wellington Wealth Management

Education:

- BS in Business Administration with a focus on Finance and Economics from Northeastern University Honors Program (Summa cum laude)
- Teaching Certification from Boston University

Danna LaCaze, Consultant

Danna brings over 18 years of professional experience in special education leadership, program development, and student achievement. She has a proven record of improving outcomes for students with disabilities, fostering inclusive practices, and guiding district-wide systems change. Recognized for achieving top growth in Louisiana for four consecutive years, her expertise has been highlighted at both the state and national levels, leading to invitations to present on best practices in special education.

K-12 Consulting Experience

- Consulted with districts across multiple states on best practices in special education and strategies for closing the achievement gap.
- Conducted classroom observations and contributed to team reports on district practices, helping to identify ways to strengthen opportunities and outcomes for students who struggle.
- Designed and developed the framework for a model early childhood classroom integrating general and special education, leveraging Universal Design for Learning (UDL) to improve student engagement and outcomes.

Other Professional Experience

- Director of Special Education, Natchitoches Parish, Louisiana. Oversaw district-wide services, compliance, multi-million-dollar budgets, and strategic initiatives for diverse learners. As an early adopter of the Special Education Playbook, led district-wide implementation of best practices, exceeding Louisiana benchmarks and driving measurable student growth. Spearheaded strategic planning that reduced academically deficient special education subgroups by 70% and positioned the district 2nd statewide for growth and proficiency.
- Special Education Coordinator, Louisiana. Supported IEP implementation, led professional development, mentored teachers, and developed district policies for academic and behavioral interventions. Coordinated gifted and talented programs to provide enrichment for advanced and twice-exceptional learners.
- Special Education Teacher, Louisiana.
- Fulbright Scholar, Leaders for Global Schools Alumni (Finland). Researched international best practices in educational leadership and teacher efficacy.
- Presenter. Presented at state and national conferences, sharing SPED Playbook insights and district leadership strategies that strengthened instructional capacity and drove student achievement.

Education:

- M.A. in Special Education, Northwestern State University of Louisiana
- B.A. in Sociology/Psychology, Northwestern State University of Louisiana



**THE STEPPING
STONES GROUP**

Transforming Lives Together



SUBMITTED TO

Westport Public Schools

Elio Longio, Chief Financial Officer
110 Myrtle Avenue
Westport, Connecticut 06880

AUTHORIZED CONTACTS

Laura Cook

Partnership Director

laura.cook@ssg-healthcare.com

T. 757.618.2224

John Gumpert

**Director of Contracts &
Proposals**

john.gumpert@ssg-healthcare.com

T. 610.517.0063

The Stepping Stones Group

184 High Street, 7th Floor
Boston, Massachusetts 02110

RFP 27-003-RFP

Special Education Program Review



Submission Date: September 1, 2026

I. Cover Letter and Certification

September 1, 2026

Tom Scarice, Superintendent of Schools

Elio Longo, Chief Financial Officer

Westport Public Schools | 110 Myrtle Avenue, Westport, CT 06880

Dear Superintendent Scarice and Chief Financial Officer Longo:

The Stepping Stones Group (SSG) is honored to submit this Technical Proposal in response to Westport Public Schools' Request for Proposals for a Special Education Program Review (RFP #27-003-RFP). We were proud to provide a response to the RFQ process and remain deeply committed to serving as Westport's trusted external partner in this important work.

SSG's mission — ensuring that every student with a disability receives the high-quality, individualized supports they need and deserve — aligns directly with the purpose of this review. SSG has built a strong track record of mixed-methods special education program reviews across the country, including completed engagements across New England in Danvers Public Schools (MA, 2024), Andover School District (MA, 2022), and Amherst School District (NH, 2026). Our review teams are led by practitioners who have worked directly inside public school special education systems — not generalist consultants — and our proprietary review tools, including the **CBS Foundational Skills Model Program Checklist**, the **CBS Classroom Observation and Environmental Readiness Tool**, and the **CBS Staffing Structure Review Checklist**, bring structured, validated rigor to every phase of our work.

Firm Identification

Legal Entity	The Stepping Stones Group, LLC
Headquarters	Boston, MA
Year Founded	1988 through legacy companies
Service Areas	Across 48 states, with deep presence in Connecticut and New England
Website	www.thesteppingstonesgroup.com
Primary Contact	Laura Cook, Partnership Director laura.cook@ssg-healthcare.com 757.618.2224
Contracts Contact	John Gumpert, Director of Contracts john.gumpert@ssg-healthcare.com 610.517.0063
Proposal Validity	This proposal remains valid for a minimum of 120 days from the submission deadline (through January 1, 2027).

Material Changes	SSG has no material changes to report from its RFQ #26-025-RFQ submission regarding firm, qualifications, or approach. The proposed team has been expanded with additional named reviewers as described in Section VII .
Subcontractors	None. All work will be performed by SSG personnel. Should any subcontractors be engaged, SSG will obtain prior written District approval and ensure they are bound by the same confidentiality and data-privacy obligations as SSG.

Representative Recent Program Review Engagements

The following recent engagements demonstrate our program review methodology, multi-level school coverage, and commitment to actionable findings. Full project details and sample report excerpts were provided in SSG's RFQ submission; references are available upon request.

Danvers Public Schools, MA (2024)	Comprehensive review of the Danvers Learning Center program across 10 classrooms at preschool, elementary, and middle school levels, serving 41 students with ASD and developmental disabilities. Scope included structured classroom observations, ABA program evaluation, staff survey (teachers, direct staff, BCBA, specialists), BCBA caseload analysis, student file review, staff interviews, and 17 prioritized recommendations. Lead evaluators: Jessica B. Thompson, BCBA, M.Ed., LABA and Kelsey Churchill, BCBA, MA, LABA. Reference: Christina Ryan, Director of Student Services, Danvers Public Schools.
Andover School District, MA (2021–2022)	PK-12 evaluation of the Bridge Autism Program across 9 classrooms and 61 students spanning five school buildings. Scope included quantitative ABA program evaluation using the Sundberg checklist, comparative district data analysis (MA DESE), staff motivation and climate survey, student file reviews, structured classroom observations across all levels, and staff interviews. Deliverables included a 20-page report with quantitative findings and prioritized recommendations organized across program systems, staff training, technology, and BCBA time allocation. Lead evaluator: Jessica B. Thompson, BCBA, M.Ed., LBA. Reference: Sara Stetson, Assistant Superintendent of Student Services, Andover SD.
Amherst School District, NH (2026)	Program evaluation of two specialized middle school programs (My Time social-emotional program and Life Skills functional program) at Amherst Middle School. Scope included the ABA Program Evaluation Form, CBS Foundational Skills Model Program Checklist, CBS Classroom Observation and Environmental Readiness Tool, CBS Staffing Structure Review Checklist, BCBA caseload review, student file audits, and structured staff interviews with case managers, BCBA, SLP, OT, social worker, and paraeducators.

	Lead evaluator: Cassie Parolisi, M.A., BCBA, LABA. Reference: Heather Jennings, Director of Student Services, Amherst SD.
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Confirmation of Mandatory Proposal Commitments

SSG confirms acceptance of all mandatory commitments in Section 3 of the RFP:

- **4–6 Month Completion:** SSG commits to delivering the full review, final report, and BOE presentation within five months of the November 2, 2026 kickoff (target: March 31, 2027), with April 2027 as a six-month contingency.
- **Districtwide Family Survey:** SSG will design, administer, analyze, disaggregate, and report a confidential districtwide survey of all families of students with disabilities.
- **Districtwide Staff Survey:** SSG will design, administer, analyze, disaggregate, and report a districtwide survey of all staff who teach, support, supervise, or make decisions affecting students with disabilities.
- **All School Levels & Program Types:** SSG will conduct onsite visits and observations covering all 10 District buildings and all major program types, including specialized and transition/18-22 programming.
- **Stakeholder Engagement:** SSG will conduct interviews, focus groups, or listening sessions with the full range of stakeholders identified in the RFP, including mental-health and behavior staff.
- **Named Key Personnel:** SSG has named key personnel assigned to this engagement. Any substitution requires prior written District approval.
- **FERPA-Aligned Data Handling:** All data handling and reporting will comply with FERPA. All findings will be reported in aggregate and de-identified form.
- **Required Deliverables:** SSG will produce all deliverables listed in RFP Section 9, including the final report, executive summary, BOE presentation, and prioritized recommendations.
- **Separate Fee Proposal:** SSG's fee proposal is submitted as a separate, clearly labeled document and does not appear in this technical proposal.

We are eager to partner with Westport Public Schools in this important work and welcome the opportunity to discuss our proposal.

Respectfully submitted,



John Gumpert

Director of Contracts & Proposals, The Stepping Stones Group

john.gumpert@ssg-healthcare.com | 610.517.0063

II. Understanding of Westport and Proposed Review Questions

District Context and Our Understanding of the Purpose

Westport Public Schools is a high-performing, resource-rich suburban Connecticut district serving a PK-12 population across ten buildings: one preschool, five elementary schools, two middle schools, one high school, and one transition program, with intensive specialized programs at multiple levels. The District has made substantial investments across its full continuum of special education supports — from early intervention and MTSS/RTI through inclusive, resource, and intensive settings, related services, behavioral and mental-health supports, and transition/18-22 programming.

The District is undertaking this review not primarily in response to a compliance deficiency, but because it is asking harder and more important questions: Are these investments working? Are services appropriately matched to individual student needs? Are students placed in the least restrictive environment? Are services delivered with consistency and fidelity across ten buildings? Are resources allocated effectively? SSG understands this distinction and will keep program effectiveness — not procedural compliance — at the center of every phase of this review.

Community feedback has surfaced specific and recurring themes that this review must take seriously:

- Family satisfaction and communication responsiveness
- IEP service-delivery fidelity across buildings and programs
- Outplacement rates, criteria, costs, and in-district capacity building
- Cross-school consistency in expectations and practice
- Paraeducator training and supervision
- Mental-health and behavioral supports
- Access to general education courses, electives, and extracurricular life
- Transitions across school levels and into postsecondary pathways

SSG also understands the scope boundaries: this is a system-level program-effectiveness review, not a legal audit, individual case investigation, ADA facilities audit, or forensic fiscal review. We will stay firmly within those boundaries while examining resource allocation, staffing, and outplacement as components of program effectiveness.

Proposed Review Questions

SSG proposes the following ten review questions, designed to connect student need, service design, delivery fidelity, experience, and outcomes. These are intended as a starting point for refinement with District leadership at project kickoff:

RQ 1: Continuum Alignment	To what extent is the District's PK–12 and transition-age continuum sufficient, consistently understood, and appropriately differentiated to address students' individualized academic, communication, behavioral, social-emotional, functional, and transition needs? How effectively does the continuum support access, progress, participation, and increasing independence in the least restrictive environment appropriate to each student?
RQ 2: Identification, Evaluation, and Program Development	To what extent do Child Find, early intervention, MTSS/RTI, referral, evaluation and reevaluation, eligibility determination, IEP development, placement, and progress-monitoring practices support timely, equitable, and individualized decision-making consistent with IDEA? How consistently are these practices implemented across schools, programs, and student groups?

RQ 3: IEP Quality, Implementation, and Educational Benefit	To what extent do IEPs demonstrate alignment among present levels, individualized needs, measurable goals, specially designed instruction, related services, supplementary aids and services, placement, and progress monitoring? To what extent does evidence indicate that IEP services are implemented as written and result in meaningful progress, access, participation, and increased independence?
RQ 4: LRE, Inclusion, and Meaningful Access	To what extent are students with disabilities educated with nondisabled peers to the maximum extent appropriate to their individualized needs, with supplementary aids and services considered and provided as appropriate? To what extent do students meaningfully participate in grade-level instruction, peer relationships, electives, extracurricular activities, and the broader life of the District while developing independence and self-determination?
RQ 5: Student Outcomes	What patterns are evident in academic achievement and growth, IEP goal progress, behavioral and social-emotional indicators, attendance, graduation, independence, self-determination, and transition-related outcomes? How do outcomes vary by school, program, grade band, disability category, placement type, service intensity, and student demographics?
RQ 6: Achievement Gaps and Progress Measurement	What trends and gaps are evident over time between students with and without disabilities in academic achievement and growth? What measures does the District use to evaluate progress toward grade-level standards, individualized IEP goals, functional performance, and independence, and how consistently are results used to adjust services and communicate progress to students and families?
RQ 7: Student, Family, and Staff Experience	How do students, families, educators, providers, paraeducators, administrators, and other stakeholders experience referral and evaluation, PPT and IEP processes, placement decision-making, service delivery, communication, collaboration, and access to supports? To what extent do these practices promote meaningful student and family participation, shared decision-making, dignity, agency, and timely resolution of concerns?
RQ 8: Outplacement and In-District Capacity	What individualized, programmatic, staffing, cultural, and systems-level factors contribute to outplacement patterns and decisions? How do beliefs, expectations, established practices, and perceptions of student need and District capacity influence those decisions? To what extent does the District first identify the supports and services each student needs before determining where those services can be delivered? Where might the District strengthen its continuum and in-district capacity while ensuring that placement decisions remain individualized, based on student need rather than disability label, existing program, or resource availability, and designed to support meaningful progress, belonging, and increasing independence?
RQ 9: Staffing, Professional Capacity, and Resources	How effectively are staffing models, caseloads and workloads, schedules, staff competencies, supervision, professional learning, career pathways, and financial resources aligned with individualized student needs and outcomes? To what extent does the District recruit, develop, support, and retain staff through clearly defined roles, competency-based training, coaching, advancement opportunities, and sustainable career pathways? How effectively do staffing and service-delivery models promote consistent implementation, meaningful participation, and student independence without creating unnecessary reliance on adult support?
RQ 10: Priorities for Sustainable Improvement	Based on findings across all evidence sources, what actionable and prioritized short-, medium-, and longer-term changes should the District consider to strengthen IDEA-aligned and individualized decision-making; LRE and meaningful inclusion; student belonging, progress, and independence; the continuum of services and in-district capacity; organizational culture and expectations; leadership capacity and accountability; service-delivery consistency; student and family partnership; staffing competencies, supervision, and career pathways; and the sustainable alignment of human and financial resources with student needs and outcomes?

III. Detailed Methodology and Work Plan

SSG conducts all program reviews through a rigorous, mixed-methods framework that integrates quantitative data analysis, IEP and document review, family and staff surveys, stakeholder focus groups, and structured onsite observations into a triangulated, system-level analysis. No single data source is treated as definitive; all findings are corroborated across multiple evidence streams before inclusion in the final report.

Phase 1 – Project Initiation and Governance

Immediately following contract execution, SSG will conduct a kickoff meeting with District leadership to confirm review questions, refine scope, establish communication protocols, and agree on deliverable formats. SSG will establish a project steering group with a defined meeting cadence, execute all required data-sharing and confidentiality agreements before accessing any student records, deliver a comprehensive initial data and document request, and finalize all survey instruments, observation protocols, and focus group guides through a District approval cycle.

SSG's project director and project manager will serve as the District's single points of contact, managing scope, schedule, quality, and communication throughout the engagement while minimizing burden on District staff.

Phase 2 – Document and Data Collection

SSG will submit an organized, categorized initial data and document request at kickoff. Requested materials include:

- Program descriptions, placement criteria, eligibility guidelines, and procedural documents
- Staffing plans, organizational charts, caseload data, paraeducator assignments, and service schedules
- Professional learning plans, training materials, and supervision frameworks
- Aggregate CT-SEDS data: enrollment, eligibility, LRE/placement, referral/evaluation, outplacement, and Child Find indicators
- EdSight outcome data: academic achievement and growth, graduation, suspension/expulsion, chronic absenteeism, and postsecondary outcomes
- Special education expenditure data, outplacement costs and vendor contracts, and staffing cost data in aggregate
- Prior review reports, state monitoring correspondence, corrective action plans, and parent communication protocols

Phase 3 – Family and Staff Surveys and Other Stakeholder Engagement

Surveys

SSG will design, pilot, administer, analyze, and report two districtwide surveys: a family survey targeting all families of students with disabilities, and a staff survey targeting all staff who teach, support, supervise, or make decisions affecting students with disabilities. Both surveys will be open for a minimum of three weeks with targeted reminders, language access, and accessibility supports. **See Section IV** for full detail.

Focus Groups

SSG will facilitate structured focus groups and interviews with a balanced cross-section of stakeholders across all school levels, program types, and roles, including central office leaders, building administrators, general and special education teachers, related service providers, paraeducators, mental-health and behavior staff, students where approved, and families. **See Section IV** for full detail.

Phase 4 – Onsite School Visits and Observations

SSG will conduct structured onsite visits to all ten District buildings, observing a representative range of settings including general education and co-taught classrooms, resource rooms, intensive and specialized programs, related service delivery, behavioral and therapeutic supports, transition/18-22 programming, and nonacademic contexts. **See Section V** for full detail.

Phase 5 – IEP and Record Review

SSG will conduct a structured review of a representative sample of IEPs using a standardized rubric aligned with IDEA, Connecticut requirements, evidence-based indicators of IEP quality, and review protocols developed through SSG's New England program-review experience. The review will examine the alignment among individualized student needs, present levels, measurable goals, services and supports, placement, progress monitoring, educational benefit, and increasing independence. The rubric examines: quality of present levels (PLAAFP); alignment among identified needs, annual goals, and specially designed instruction; appropriateness of related services, accommodations, and modifications; placement decisions and LRE justification; progress monitoring frequency, rigor, and family communication; and evidence of student and family participation in the PPT process.

- **Sampling Strategy:** SSG will review a stratified random sample of approximately 40–60 IEPs designed to represent the District's schools, grade bands, disability categories, placement types, and levels of service intensity, including both in-district and out-of-district placements. The final sample size and stratification plan will be confirmed at kickoff based on the District's special education population, available records, and applicable privacy requirements.
- **Reviewer Calibration and Inter-Rater Agreement:** All reviewers will complete initial training and calibration using the standardized IEP-review rubric before beginning the full review. A minimum of 20% of sampled IEPs will be independently scored by a second reviewer, with a target of at least 80% agreement across scored items. Results below the established threshold will prompt recalibration and additional double-scoring. Rating differences will be resolved through structured review, and the quality-assurance process and aggregate inter-rater agreement will be reported in the final report.
- **Confidentiality:** All IEP review conducted under the data-sharing agreement. No individual record identifiable in any deliverable. Findings reported exclusively in aggregate.

Phase 6 – Analysis, Triangulation, and Benchmarking

SSG's analysis will integrate publicly available data, District-provided records, and structured program-evaluation tools. As one component of the systems-level review, SSG will adapt relevant elements of its CBS Staffing Structure Review Checklist to examine staffing allocation, caseloads and workloads, coverage, role clarity, supervision, competency development, professional learning, team communication, leadership capacity, and career pathways. Findings will consider how staffing and service-delivery structures align with individualized student needs, support consistent implementation across the continuum, and promote meaningful participation and increasing student independence without creating unnecessary reliance on adult support.

- **Disaggregated Analysis:** Quantitative data will be analyzed, where data quality and privacy requirements permit, by school, grade band, disability category, race and ethnicity, gender, multilingual learner status, placement type, service intensity, and other relevant student or program characteristics. The analysis will examine patterns of access, identification, placement, service delivery, and outcomes.
- **Achievement and Growth Analysis:** SSG will examine trends and gaps between students with and without disabilities using available SBAC/CMT proficiency, growth, and other District-selected measures. The analysis will also consider how the District measures, uses, and communicates progress toward grade-level standards, IEP goals, functional outcomes, and increasing independence.
- **Benchmarking:** Selected data, practices, staffing structures, and outcomes will be compared with Connecticut District Reference Group peers, state averages, comparable districts identified collaboratively with Westport, and relevant evidence-based and IDEA-aligned practice frameworks. Comparisons will be interpreted in context and will not be used as stand-alone indicators of program quality or staffing adequacy.
- **Triangulation:** SSG will integrate evidence from quantitative data, document and IEP review, surveys, focus groups and interviews, and structured observations. The analysis will identify areas of convergence, divergence, and variation across data sources and stakeholder groups. Findings supported by multiple sources will be distinguished from emerging concerns or perspectives supported by a single source.
- **Data Quality and Interpretation:** SSG will conduct data-quality checks, document missing or inconsistent information, and apply small-cell suppression and aggregation rules appropriate to each data source, with a default suppression threshold of fewer than five individuals unless a more protective standard is required. Findings will include relevant limitations and will clearly distinguish descriptive patterns and associations from causal conclusions.

Phase 7 – Reporting and Action Planning

- **Interim Leadership Briefing:** Presentation of emerging themes, areas of convergence and divergence across evidence sources, data limitations, and questions requiring clarification. This briefing will allow District leadership to provide factual context without influencing the independence of the final findings.
- **Draft Report:** Delivery of preliminary findings and recommendations for District factual review. District feedback will be limited to correcting factual inaccuracies, identifying missing context or data, and clarifying District practices. SSG will retain responsibility for the independent analysis and conclusions.
- **Final Report:** Comprehensive written report including an executive summary, review questions, methodology, data sources and limitations, findings and supporting evidence, District strengths, areas for improvement, and prioritized recommendations. Recommendations will address IDEA-aligned practices, LRE and meaningful inclusion, student progress and independence, the continuum and in-district capacity, organizational culture, leadership capacity, family partnership, service-delivery consistency, workforce development and career pathways, and alignment of resources with student needs. Each major recommendation will include its rationale, supporting evidence, priority, implementation horizon, key dependencies, anticipated resource implications, responsible leadership considerations, and suggested measures of progress.
- **Action-Planning Session:** At least one facilitated leadership working session to translate findings into initial implementation priorities. The session will support sequencing, identification of responsible leaders, resource and capacity considerations, measurable next steps, and alignment with existing District initiatives.

- **Board of Education Presentation:** Public-facing presentation of the review’s methodology, strengths, findings, and prioritized recommendations. The presentation will use clear, accessible language for a broad community audience, protect confidential information, and distinguish system-level findings from individual experiences or cases. The presentation materials will be provided in accessible PowerPoint and PDF formats.

IV. Family and Staff Surveys and Stakeholder Engagement

Survey Design Process

SSG will develop district-specific family and staff surveys through a structured design and review process. Survey items will be adapted from SSG’s program-review instruments, including the Staff Motivation and Climate Questionnaire, informed by Reid and Parsons’ Motivating Human Service Staff framework and used across multiple SSG program reviews. These tools will be supplemented with items aligned with the ten review questions, relevant research and IDEA-aligned practice frameworks, and the priorities identified in the RFP.

Survey domains will address individualized decision-making; LRE and meaningful inclusion; student access, belonging, progress, and independence; service implementation; family and student partnership; organizational culture and leadership; staffing, supervision, professional learning, and career pathways; and confidence in the District’s continuum of services.

SSG will share draft instruments with District leadership and designated stakeholder representatives to review local relevance, terminology, accessibility, cultural and linguistic responsiveness, and alignment with the review’s scope. The surveys will then undergo a brief pilot and usability review before finalization and programming in the selected platform. The development, review, pilot, and District approval process will be completed within the first four weeks of the engagement.

Survey Domains

Both surveys address the following core domains, with items tailored to the respondent population:

Communication & Responsiveness	Frequency, quality, and timeliness of communication; responsiveness to family and staff questions and concerns.
IEP/PPT Process	Family involvement in PPT meetings; understanding of IEP goals, services, and placement rationale; experience when there is disagreement.
Service Fidelity & Effectiveness	Perceived consistency and effectiveness of service delivery; alignment of services to student needs.
Inclusion & Access	Access to general education settings, grade-level curriculum, electives, extracurriculars, and nonacademic opportunities.
Mental Health & Behavioral Supports	Availability, accessibility, and perceived effectiveness of behavioral and mental-health supports.
Staffing & Professional Learning	Staff survey only: training, supervision, role clarity, caseloads, collaboration, and professional learning adequacy.

Transitions	Experience across key transition points (preschool → elementary → middle → high school → postsecondary).
Outplacement	Family experience with outplacement criteria and processes (family); staff perspective on in-district vs. outplaced capacity (staff).
Overall Satisfaction	Global satisfaction rating and open-ended opportunity to share additional feedback.

Platform, Accessibility, and Language Access

- **Platform:** SSG will administer both surveys using Microsoft Forms- mobile-compatible, screen-reader accessible, and FERPA/privacy compliant.
- **Language access:** Surveys translated into all languages represented in the District's student population above a threshold of [5+] families, using professional translation services. Invitations and reminders translated as well.
- **Anonymity:** Family survey fully anonymous. Staff survey anonymous to the extent possible; demographic fields selected to prevent re-identification in small staff groups.

Response Rate Strategy

- Advance communication from District leadership (Superintendent, Director of Special Education) emphasizing purpose and anonymity protections, prior to survey launch.
- At least two reminder communications distributed through District channels at approximately 1-week and 2-week marks.
- Multi-modal access: online survey link via email, District app, and parent portal; paper copies available upon request.
- For staff: supervisors asked to communicate survey importance and allow protected completion time where feasible.
- SSG will monitor response rates in real time and recommend mid-course outreach adjustments if rates fall below target thresholds.

Disaggregation, Qualitative Coding, and Reporting

- **Disaggregation:** By school level, respondent role (staff survey), disability category (where feasible and approved), race/ethnicity, home language, and other relevant variables. All subject to minimum group-size requirements (default: n<10 suppressed) to protect privacy.
- **Open-Ended Coding:** Structured thematic coding framework developed prior to analysis. Quality-control: second-coder reliability check on a minimum 20% random sample; divergent codes resolved through structured discussion. Themes reported in aggregate with illustrative (never identifiable) summary language.
- **Reporting:** Separate stand-alone family and staff survey reports, plus integrated findings in the final review report. Each report includes: invitations distributed, completed responses, response rate, applicable denominators, subgroup representation, methodological limitations, and nonresponse bias assessment where feasible. Results not characterized as districtwide unless participation and evidence support that conclusion.

Stakeholder Engagement: Focus Groups and Interviews

SSG will conduct structured focus groups and/or individual interviews with the following stakeholder groups, using consistent protocols designed to capture varied perspectives across levels, programs, disability profiles, placements, and service intensity:

Central Office Leaders	Individual or small-group interviews with Superintendent, Director of Special Education, Director of Pupil Personnel Services, building principals, and relevant central office staff.
Special Education Teachers	Multiple focus groups stratified by school level (elementary, middle, high, transition/18-22). Minimum 2-3 focus groups.
General Education Teachers	Focus groups including teachers who co-teach or who serve students with disabilities in their classrooms. Minimum 1–2 focus groups.
Related Service Providers	Focus group(s) with speech-language pathologists, occupational and physical therapists, school counselors, and other providers.
Paraeducators	Dedicated focus group(s) with attention to training, supervision, role clarity, and relationship with classroom teachers.
Mental Health & Behavior Staff	Focus group or interviews with school psychologists, social workers, behavior specialists, and BCBAs where applicable.
Families	At least 2 family focus groups or listening sessions, offered at varying times and in multiple languages as needed. Coordinated through District-approved channels.
Students	Structured listening sessions with high school students with disabilities if approved by the District, with appropriate consent and safeguards. Participation voluntary and coordinated with District administration.

All focus group and interview findings will be reported exclusively in aggregate and de-identified form. SSG will explicitly distinguish between isolated experiences and corroborated patterns appearing across multiple independent sources, and will triangulate stakeholder engagement findings with survey results, quantitative data, IEP review findings, and observations before inclusion in the final report.

V. Site Visit and Observation Plan

Building Coverage

SSG commits to visiting all ten District buildings: the preschool, all five elementary schools, both middle schools, the high school, and the transition program. No building will be excluded. Scheduling will be coordinated with District leadership during Phase 1 to minimize disruption to instruction and students.

Proposed Onsite Days and Coverage

Total Onsite Days	Approx. 10 days across the project period (December–January 2027)
Preschool	1 day — Project Director + Project Manager

Elementary Schools (×5)	5 days — one per building; Project Director + Project Manager
Middle Schools (×2)	2 days — both buildings; Project Director + Project Manager
High School	1 days — Project Director + Project Manager
Transition Program (18-22)	1 day — Project Director + Project Manager
Reserve	1–2 additional half-days held for follow-up or program-specific observations identified during the review

Settings Observed

Within each building, SSG observers will prioritize a representative cross-section of:

- General education/inclusion classrooms with students with disabilities present
- Co-taught classrooms (special educator + general educator model)
- Resource room support settings
- Intensive support programs (self-contained or substantially separate)
- Specialized programs (e.g., autism support, behavioral/ED programs, language-based programs)
- Related service delivery (speech-language, OT/PT, counseling) where schedules permit
- Behavioral and therapeutic support settings
- Transition and vocational programming (high school and 18-22)
- Nonacademic and extracurricular contexts where feasible (lunch, specials, clubs, after-school)

Structured Observation Protocol

All observations will use SSG's proprietary CBS Classroom Observation and Environmental Readiness Tool, a structured instrument deployed across SSG's New England program reviews (including Danvers PS, 2024, and Amherst SD, 2026). The tool will be calibrated and adapted for the comprehensive district-wide context of this engagement and approved by the District prior to use.

The protocol captures evidence on:

- Evidence of LRE principles in practice: natural proportions, access to grade-level peers, physical and social inclusion
- Access to grade-level curriculum and specially designed instruction (SDI) that is intentional, explicit, and differentiated
- Implementation of IEP-specified accommodations, modifications, and supports
- Quality of instructional interactions among teachers, paraeducators, and students
- Student engagement, independence, and sense of belonging
- Co-teaching model fidelity and role differentiation where applicable
- Paraeducator proximity and facilitation of student independence

Observer Qualifications, Calibration, and Quality Assurance

Qualifications: All SSG observers will have prior experience conducting structured classroom and program observations in PK-12 special education settings, including individuals who have held instructional, supervisory, or administrative roles in special education.

Calibration: All observers participate in a calibration session using the observation protocol with video examples or practice scenarios before the first site visit. Target inter-rater reliability: 80%+ agreement on protocol items.

Documentation: Observation notes completed in writing during or immediately following each observation and reviewed by the Project Director before analysis.

Confidentiality: No individual student, staff member, or family identifiable in any observation record or deliverable. Findings reported in aggregate at the program and system level. Observations are not evaluative of individual staff performance.

VI. Data, IEP, Benchmarking, and Resource Analysis

Data Sources

CT-SEDS	Enrollment, disability category, LRE/placement, referral and evaluation timelines, outplacement, Early Childhood data, Child Find indicators
EdSight / CSDE	CT State Performance Plan indicators, CMT/SBAC performance, graduation, suspension/expulsion, chronic absenteeism, postsecondary outcomes
District Records	Caseload and staffing data, service schedules, outplacement vendor contracts and costs, budget and expenditure data (aggregate), professional learning records
Local Assessments	Benchmark, diagnostic, and progress-monitoring data including growth data where available
IEP System Data	Aggregate data on IEP goal attainment, progress monitoring frequency, and service documentation from CT-SEDS or the District's IEP platform

Achievement and Growth Gap Analysis

SSG will analyze the gap in academic achievement and growth between students with disabilities and students without disabilities using SBAC/CMT proficiency rates, Student Growth Percentile (SGP) data where available, and local assessment data. Analysis will address:

- Proficiency gap by subject (ELA, math), grade band, school level, disability category, and demographic subgroup
- Growth trends over time (minimum 3 years where data quality permits)
- How the District measures and communicates progress toward grade-level expectations to families, and the consistency of this practice across schools

SSG will clearly communicate data limitations, including constraints of small group sizes, assessment validity for students with significant disabilities, and the distinction between association and causation in reported patterns.

Benchmarking Approach

- **Connecticut State Averages:** CT-SEDS and EdSight statewide data and trend lines across key indicators
- **DRG Peers:** Westport's CT District Reference Group peers, where DRG data is available and meaningful
- **Comparable Districts:** Comparable districts identified in collaboration with District leadership based on enrollment, demographics, geographic context, and SPED percentage
- **Fiscal Benchmarks:** CT Special Education Expenditure Project (SWEEP) data and per-pupil expenditure benchmarks where available
- **Best Practices:** National and state research on evidence-based practices, LRE trends, and effective program models

SSG will document comparison group selection methodology and clearly communicate limitations, including differences in district characteristics, data availability, and time lags in public data sources.

Staffing and Resource Analysis

SSG will conduct a program-effectiveness-focused (not fiscal-audit) analysis of:

- Special education staffing ratios, caseload sizes, and paraeducator deployment patterns relative to student needs and district/state standards
- Alignment between staffing models, program types, and LRE goals
- Professional learning investment, training content, and staff-reported preparation and support
- Special education expenditure patterns, per-pupil costs, and cost trends over time, benchmarked against comparable districts and state data
- Outplacement costs, trends, vendor relationships, and the potential cost-effectiveness of in-district capacity expansion in appropriate areas

SSG will be explicit throughout that this analysis is in service of program-effectiveness conclusions and is not a forensic accounting review or legal audit.

VII. Proposed Team and Level of Effort

SOG proposes the following named review team, assembled specifically for this engagement. Resumes for all named team members are attached as **Appendix A**.

Team Overview

Project Director / Lead Reviewer Jessica B. Thompson, M.Ed., BCBA, LABA, Vice President of Education Partnerships	The Stepping Stones Group. Jessica is a Board Certified Behavior Analyst and educational systems leader with extensive experience conducting districtwide special education needs assessments, continuum of services reviews, specialized program evaluations, and strategic planning initiatives. Her expertise includes inclusion and LRE practices, behavioral and educational programming, staffing and resource allocation, organizational capacity building, and systems improvement. Jessica has led comprehensive evaluations across PK–12 and transition-age programming throughout New England, including engagements in Danvers Public Schools (MA, 2024) and Andover School District (MA, 2021–22). For this engagement, she will provide overall project leadership, lead stakeholder engagement and leadership interviews, oversee data synthesis, and author the final report and recommendations.
Project Manager Brianne Fredericks, M.S., BCBA, LABA, Clinical Director	Brianne (Bri) is a Board Certified Behavior Analyst who provides leadership, operational and clinical quality oversight to assigned programs spanning school, center, and home and community services (multi-state oversight of programs across NH, MA, CT, PA, DC, CO, MI, FL). She also supervises, leads and coaches local leaders responsible for oversight of their assigned service site/region. For this engagement, Rachel will co-lead data collection and analysis, stakeholder interviews, classroom and program observations, document review, survey administration, and development of findings and recommendations.
Data Lead Nicole Kinnard, M.A., BCBA, , Educational Partnerships	Nicole brings 20 years of experience in special education and behavioral health. She conducts district needs assessments, develops training content, supervises staff, and drives implementation of evidence-based behavioral programs tailored to each district’s needs. Her leadership ensures clinical excellence, compliance, and results-driven outcomes across all service lines. For this engagement, Nicole will support the Project Manager on data analysis, IEP review, and quantitative benchmarking across CT-SEDS and EdSight indicators. She will also support stakeholder interviews, family engagement activities, review of behavioral and mental-health supports, and analysis of systems designed to support student well-

	being and social-emotional development. She will also support both the family and staff survey design, administration, analysis, and reporting.
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Level of Effort

Role	Phase 1–2 (Nov–Dec)	Phase 3–4 (Dec–Jan)	Phase 5–6 (Jan–Feb)	Phase 7 (Feb–Apr)	Total Days	Onsite Days
Jessica Thompson — Project Director / Lead	3	20	0	5	28	18
Brianne Fredericks — Project Manager	13	20	19	5	57	18
Nicole Kinnard — Data Lead	13	10	19	5	47	8

All named personnel are committed to the Westport engagement for the duration of the project. We understand that any substitution of key personnel requires prior written District approval and will be limited to individuals of equivalent or greater qualification and Connecticut experience. No subcontractors are anticipated; if any are engaged with prior District approval, they will be bound by the same privacy, performance, and confidentiality obligations as SSG. Resumes for all named team members are attached as **Appendix A**.

VIII. Potential Conflicts of Interest

SSG has conducted a thorough internal review of potential conflicts of interest with respect to this engagement.

- **Past or Present Relationships:** SSG has not held any contractual or other relationship with Westport Public Schools or any member of the District's Administration within the past five years. SSG confirms that no such relationship would compromise the independence of this review.
- **Other Independence Factors:** SSG is not aware of any other factor that could reasonably give rise to a conflict of interest or an appearance of a conflict of interest in connection with this engagement.
- **Prohibition on Follow-Up Work:** SSG acknowledges and fully accepts the restriction in RFP Section 6 prohibiting bidding on or working on follow-up or future projects arising from this review's recommendations, unless that restriction is expressly removed by the Superintendent of Schools. SSG will not use this engagement to market or position itself for follow-up contracts.
- **Ongoing Disclosure:** SSG will promptly disclose to the District any potential conflict of interest that arises during the course of the engagement.

IX. Timeline and Project Management

Five-Month Project Calendar (November 2026 – March 2027)

The following milestone calendar is based on a November 2, 2026 kickoff and a target completion of March 31, 2027, with April 2027 as the six-month outer contingency. Specific milestone dates will be confirmed with District leadership at project kickoff.

Activity / Milestone	Nov	Dec	Jan	Feb	Mar	Apr
Project kickoff meeting	•					
Data-sharing & confidentiality agreements executed	•					
Initial data & document request submitted	•					
Survey instruments developed & District-reviewed	•	•				
Observation & focus group protocols finalized	•	•				
Document & record review (ongoing)	•	•	•			
Family survey: launch, reminders, close		•	•			
Staff survey: launch, reminders, close		•	•			
Stakeholder focus groups & interviews		•	•			
Onsite school visits & observations (all 10 buildings)		•	•			
IEP / record review			•			
Survey analysis & stand-alone reporting			•	•		
Quantitative data & benchmarking analysis		•	•	•		
Triangulation & synthesis				•		
Interim leadership briefing				•		
Draft report → District factual review					•	
Final report & executive summary					•	
Action-planning working session					•	
Board of Education presentation						•

District Dependencies and Risk Management

District Dependencies	Timely execution of data-sharing agreements; prompt response to data/document requests; scheduling support for site visits and focus groups; survey invitation distribution through District channels; factual review of draft report within agreed-upon turnaround.
Survey Participation Risk	If family or staff response rates fall below agreed upon threshold, SSG will recommend supplemental outreach and adjust the scope of disaggregation or nonresponse characterization accordingly. Survey findings will be clearly qualified where representative participation cannot be established.
Calendar Risk	School-year scheduling constraints (holiday breaks, testing windows) may compress available site-visit and focus-group windows. SSG will build a 3-week buffer into Phase 5–6 scheduling and will identify an April 2027 contingency window for final report delivery if needed.
Data Access Risk	If requested data is unavailable or incomplete, SSG will document the gap, adjust the analysis accordingly, and communicate limitations clearly in the final report.

X. Deliverables

The final report, executive summary, survey summaries, and Board presentation will be prepared in accessible, public-facing formats subject to legally required redactions and applicable confidentiality protections. SSG acknowledges that these materials are expected to be public documents. All nonproprietary project-specific instruments and data files created for the District will be delivered upon project completion. Restrictions on further distribution of SSG's proprietary core instruments will be addressed in the contract.

Deliverable	Format	Target Date	Lead
Data-sharing and confidentiality agreements	Executed documents	Nov 2026, Week 1	Project Manager
Kickoff materials: project management plan, finalized review questions, communication protocols, project roles, schedule, and initial data request	Word + accessible PDF	Nov 2026, Week 2	Project Director
Stakeholder engagement plan: sampling, balanced-participation strategy, protocols, accessibility supports, and interview/focus-group formats	Word + accessible PDF	Nov 2026, Week 3	Survey and Stakeholder Lead
Site-visit and observation plan, including building coverage, sampling, structured	Word + accessible PDF	Nov 2026, Week 3	Project Manager/ Site Visit Lead

Deliverable	Format	Target Date	Lead
protocols, observer calibration, and documentation procedures			
IEP and record-review plan, including sampling methodology, standardized rubric, reviewer training, inter-rater agreement, and quality-assurance procedures	Word + accessible PDF	Nov 2026, Week 4	Data and IEP Review Lead
Approved family survey instrument, administration plan, accessibility and language-access plan, response-rate strategy, and analysis and disaggregation plan	Survey platform + accessible PDF	Nov 2026, Week 4	Survey and Stakeholder Lead
Approved staff survey instrument, administration plan, confidentiality protections, response-rate strategy, and analysis and disaggregation plan	Survey platform + accessible PDF	Nov 2026, Week 4	Survey and Stakeholder Lead
Family survey findings report, including participation, subgroup representation, limitations, and appendix tables	Accessible PDF + appendix tables	Feb 2027	Survey and Stakeholder Lead
Staff survey findings report, including participation, subgroup representation, limitations, and appendix tables	Accessible PDF + appendix tables	Feb 2027	Survey and Stakeholder Lead
Aggregate stakeholder-engagement synthesis, including areas of convergence, divergence, and variation across stakeholder groups	Interim briefing + final report	Feb/Mar 2027	Survey and Stakeholder Lead
Aggregate observation synthesis, including patterns across schools, programs, and settings	Interim briefing + final report	Feb/Mar 2027	Project Manager/Site Visit Lead
IEP and record-review analysis, including aggregate findings, inter-rater agreement, and methodological limitations	Final report + appendix	Analysis completed Feb 2027; delivered Mar 2027	Data and IEP Review Lead
Interim leadership briefing: emerging themes, evidence convergence and divergence, data limitations, and questions for clarification	PowerPoint + facilitated discussion	Feb 2027	Project Director
Draft final report for District factual and contextual review	Word + accessible PDF	Mar 2027, Week 1	Project Director
Final written report with executive summary, findings, commendations, prioritized recommendations, implementation considerations, and suggested progress measures	Word + accessible PDF	Mar 2027, Week 3	Project Director

Deliverable	Format	Target Date	Lead
Initial action-planning working session and written summary	Facilitated session + summary document	Mar 2027, Week 4	Project Director
Board of Education presentation deck and public presentation	PowerPoint + accessible PDF	Mar/Apr 2027, based on BOE schedule	Project Director
Final analytic files and nonproprietary instruments, protocols, and coding frameworks approved for District use	Native files, per contract terms	Project close	Project Manager/Data Lead

XI. Data Privacy and Security

Data-Sharing Agreements	SSG will execute a formal data-sharing agreement with the District prior to accessing any student-level records or confidential data, specifying: permitted data categories, permissible uses, access controls, storage and transfer protocols, retention periods, and destruction obligations. SSG will also execute any District-required NDA or privacy documentation.
Secure Storage & Transfer	All electronic District data stored on SSG's encrypted, password-protected systems with access limited to named project team members. No data stored on personal devices or non-encrypted media. All transfers via secure, encrypted channels (SFTP, encrypted email, or District-approved platform).
Access Controls	Role-based access: only SSG team members with a need for specific data categories have access to those records. Access revoked upon project completion. SSG maintains an access log for all student-level records accessed.
Encryption	Data at rest: AES-256 encryption on SSG's secure storage. Data in transit: TLS 1.2+ for all data transfers.
De-Identification	All deliverables present findings in aggregate and de-identified form. No individual student, family member, staff member, or focus group participant is identified in any report, finding, or appendix.
Data Suppression	SSG applies suppression rules consistent with Connecticut EdSight standards. Any cell or subgroup with fewer than [5] individuals is suppressed or combined in all reports to prevent re-identification.
Survey Anonymity	Family survey: fully anonymous (no PII collected). Staff survey: anonymous to the extent possible; demographic items selected to prevent re-identification in small groups. Survey platform configured to prevent collection of identifying metadata. Survey data stored separately and never shared in individual form.
Incident Response	In the event of a suspected data breach or unauthorized access, SSG will notify the District within 24 hours of discovery, document the incident, take immediate remediation steps, and cooperate fully with any required investigation.
Retention & Destruction	Upon project completion, all student-level and confidential District data will be securely destroyed per the agreed data-sharing agreement timeline (default:

	within 60 days of final deliverable acceptance). SSG will provide written confirmation of destruction upon request.
Subcontractor Controls	No subcontractors anticipated. If any are engaged with prior District approval, they will be bound by the same privacy, security, and confidentiality obligations as SSG through written agreement.
FERPA Compliance	All aspects of SSG's data handling are designed to comply with FERPA. SSG operates as a school official with a legitimate educational interest under FERPA for purposes of this engagement, consistent with the District's data-sharing agreement.

XII. Exceptions and Assumptions

Exceptions

SSG proposes no exceptions to the scope, mandatory commitments, or terms set forth in RFP #27-003-RFP. The following clarifications describe implementation details that will be finalized collaboratively with the District:

- **IEP Sample Size:** SSG proposes a stratified random sample of approximately 40–60 IEPs. The final sample size and stratification plan will be confirmed at kickoff based on the District's special education population, available records, and the need for meaningful representation across schools, grade bands, disability categories, placement types, and levels of service intensity while protecting student privacy and minimizing administrative burden.
- **Student Engagement:** Student listening sessions will be conducted with District approval and in accordance with applicable parent consent, student assent, accessibility, confidentiality, and logistical requirements. Participation will be voluntary and designed to include students with varied communication and support needs. If direct student engagement is not approved or feasible, SSG will document the limitation and identify other available sources of student-experience data without representing them as equivalent to direct student input.
- **Follow-Up Work Restriction:** SSG acknowledges and accepts the restriction in RFP Section 6 concerning bidding on or performing follow-up implementation work arising from this review's recommendations. SSG will comply with the restriction as stated in the RFP and any resulting contract.

Assumptions

- The District will designate an executive sponsor and project liaison with sufficient authority to coordinate scheduling, data access, stakeholder engagement, and logistical requests. The anticipated response time is 10 business days for data and document requests and five business days for scheduling and routine project communications.
- The District will distribute approved family and staff survey invitations and reminders through established communication channels, including email, the parent portal, the District application, and other available channels appropriate to the intended respondents.
- The District will support language access and accessible participation by identifying required languages, communication formats, and accommodations for surveys, interviews, focus groups, and student listening sessions.

- The District will provide secure, timely access to approved CT-SEDS aggregate exports, EdSight data, District-held program, staffing and financial information, and other records required by the agreed scope and data-sharing agreement. SSG will not access CT-SEDS directly.
- The District will support recruitment of a balanced cross-section of stakeholders while protecting voluntary participation and avoiding participation structures that could inhibit candid feedback.
- Onsite visits will be scheduled jointly to minimize disruption and, where feasible, avoid major testing windows, holidays, and other significant District calendar events.
- The District will provide appropriate private and accessible spaces for interviews, focus groups, student listening sessions, and other confidential stakeholder-engagement activities.
- District leadership will review draft instruments, protocols, and factual content within the agreed-upon timelines. District review will address local relevance, terminology, factual accuracy, accessibility, and contextual clarification without directing or altering SSG's independent findings.
- SSG's fee proposal will be submitted as a separate, clearly labeled document and will not appear in the technical proposal, consistent with RFP Section 12.

Appendix A – Resumes of Key Personnel

CONTACT

- email: Jessica.b.moo@gmail.com
- phone: 781-710-7966
- address: 21 1st Street,
North Andover, MA 01845

LICENSURE & CERTIFICATION

Board Certified Behavior Analyst (2014)
Licensed Behavior Analyst in Massachusetts
Massachusetts Initial Educators License-
Severe Disabilities, All Levels

PROFESSIONAL CERTIFICATIONS

Organizational Behavior Management (OBM)
Certificate, ABA Technologies, Inc.

EDUCATION

ENDICOTT COLLEGE, BEVERLY, MA
MASTER OF EDUCATION 2013
Special Education and Applied Behavior
Analysis- Severe Disabilities

UNIVERSITY OF MASSACHUSETTS, AMHERST, MA
BACHELOR OF ARTS IN SOCIOLOGY 2007
Criminal Justice Concentration
Social Services Certificate

SKILLS

- Applied Behavior Analysis
- Enthusiastic and Engaging Speaker
- Staff Training and Development
- Leadership Development
- Organized and Action Focused
- Strategic Planning and Execution
- Project Management
- Special Education
- Sales and Client Relations
- Treatment of Severe Challenging Behavior- PFA/SBT
- Compassionate/Trauma Informed Care
- Vocational And Life Skills Programming
- Data Analysis
- Excel

SPEAKING EVENTS

- Effectively Disseminating ABA Across Environments: Presenting to Groups, Contentious meetings, and Supervising Others Whether They Report to You or Not (*APBA*), 2019
- Gamified Training: Curriculum and Measurement DIY (*APBA*), 2023

PROFESSIONAL MEMBERSHIPS

Massachusetts Association of Behavior
Analysis (MASSABA)
Berkshire Association for Behavior Analysis
and Therapy (BABAT)
Association of Professional Behavior
Analysts (APBA)
New Hampshire Association of Behavior
Analysis (NHABA)

JESSICA B. THOMPSON

DEDICATED EDUCATION PARTNER | BEHAVIOR ANALYST

Board Certified Behavior Analyst and education executive with 15+ years of experience designing, implementing, and scaling behavior analytic systems within public school districts. Expertise includes Multi-Tiered Systems of Support (MTSS), IDEA-aligned service delivery, organizational behavior management (OBM), district capacity-building, and executive-level partnership development. Proven track record of leading multi-region service lines, managing P&L performance, and improving student outcomes through data-driven, sustainable systems.

EXPERIENCE

THE STEPPING STONES GROUP

Vice President of Education Partnerships | 2026- Present

Director of Education Partnerships | 2025-2026

Manager of School Strategy | 2024-2025

- Promoted through successive leadership roles based on district growth and systems-level impact.
- Lead executive partnerships with superintendents, special education administrators, and school boards to align ABA services with district goals, IDEA requirements, and compliance mandates.
- Design and implement districtwide systems integrating Applied Behavior Analysis (ABA) within MTSS frameworks to support academic achievement, behavioral stability, and inclusion.
- Oversee multidisciplinary teams of BCBAs, special educators, and consultants providing direct and consultative services to public school districts.
- Develop scalable service models to increase district capacity, improve treatment fidelity, and ensure sustainable outcomes.
- Utilize data analytics and performance reporting to measure student progress and system effectiveness.
- Support contract growth and long-term partnership sustainability through strategic planning and stakeholder engagement.

CONSTELLATIONS BEHAVIORAL SERVICES

Director of Client Services | 2023-2024

Director of School Services | 2022-2023

Regional Director | 2019-2023

Educational and Behavioral Consultant | 2015-2019

- Advanced through five leadership roles culminating in operational and financial oversight of school-based services across Massachusetts and New Hampshire.
- Oversaw school consultation services across 30+ public school districts, supporting students with autism, emotional/behavioral disorders, developmental disabilities, and complex needs.
- Held full P&L responsibility; exceeded revenue targets and achieved 20% year-over-year growth through strategic contract expansion.
- Built and supervised multi-tier leadership teams, including Regional Coordinators, BCBAs, and Educational & Behavioral Consultants.
- Designed and executed onboarding and training programs to ensure compliance, treatment fidelity, and consistent implementation of evidence-based practices.
- Monitored performance indicators across clinical quality, safety, service delivery, and financial sustainability.
- Collaborated with district leadership to build internal capacity and implement sustainable behavioral systems.

MELMARK NEW ENGLAND

Lead Special Education Teacher | 2009-2015

- Served in a highly structured, ABA-based educational setting for students ages 10-22 with significant behavioral and developmental needs.
- Led classroom teams across multiple age bands, including transition-aged programming.
- Developed and implemented individualized academic, behavioral, vocational, and life skills curricula aligned with IEP goals.
- Conducted functional behavior assessments and academic evaluations to guide data-driven intervention planning.
- Collaborated with interdisciplinary teams to maintain compliance and improve student outcomes.

LEXINGTON PUBLIC SCHOOLS

Instructional Assistant | 2008-2009

- Participated as a member of the Compass Behavioral Inclusion Program, serving middle school students grade 6-8 exhibiting emotional and behavioral difficulties.

WALKER HOME AND SCHOOL

Child Care Worker | 2008

- Participated as a member of a treatment team in a residential program designed to meet the social, behavioral, and educational needs of children exhibiting emotional and behavioral difficulties.

BRIANNE FREDERICKS

39 N. Mast Street
Goffstown, NH 03045

Brianne.fredericks@ssg-healthcare.com • (603) 948-4383 ext 8904

EXPERIENCE

The Stepping Stones Group- Community Autism Services, Boston, MA (July 2024- Present)

Regional Clinical Director

July 2024- Present

- Provides leadership, operational and clinical quality oversight to assigned programs spanning school, center, and home and community services (multi-state oversight of programs across NH, MA, CT, PA, DC, CO, MI, FL)
- Supervises, leads and coaches local leaders responsible for oversight of their assigned service site/region
- Maintains the P&L for all cost centers, supporting revenue and gross margin goals
- Champions cultural dissemination and people change management to support company initiatives and goals while supporting teammates in a supportive, collaborative, and exciting work environment
- Supports acquisition team with assessment of potential partners as well as integration efforts for newly acquired locations/programs

Constellations Behavioral Services, Portsmouth, NH (Aug. 2014- July 2024)

Vice President of Client Services

Dec. 2022-July 2024

- Lead and directed all revenue-producing divisions of a multifaceted ABA business including the School Service Division, providing consultation to 30+ school districts in NH & MA and the Family Service Division, operating three early-intensive learning centers for preschool-aged children
- Supervised, hired, trained, and ensured retention of approximately 140 staff while maintaining adherence to clinical quality standards and revenue targets
- Member of the Executive Council, collaborated with the Chief Executive Officer, Chief Clinical Officer, Chief Financial Officer, VP of Support Services to drive company action
- Expanded and refined implementation of KPI systems and tracking to all operational units to monitor overall health of the agency using a Balanced Scorecard Approach (BSC)
- Supervised and coached division directors to oversee a team of service-specific coordinators responsible for the day-to-day operations of each site/region
- Designed and implemented leadership development training programs and curriculum for all leaders of the organization with a focus on establishing cross-divisional, high performing work teams
- Drove continuous improvement and company initiatives through the development and implementation of strategic plans (1, 3, 5 year)
- Supported tactical execution of team's goals through vision summaries and quarterly priorities, project management oversight, and people change management support

Vice President of School Services

Feb. 2021- Dec. 2022

- Developed and implemented use of KPI systems and tracking to ensure the overall health of the division using a Balanced Scorecard Approach (BSC)
- Scaffolded and trained use of BSC across key domains including safety, clinical quality, cost, delivery, and people
- Maintained a fiscally healthy School Service Division that exceeded GPM and NPM targets
- Supported the team in maximizing contractual agreements and service expansion resulting 20%+ revenue growth of the division year over year
- Recruited, trained, and retained Directors and Coordinators to operate the division's four geographic regions spanning NH and Northern MA
- Gathered, predicted, and analyzed market trends and conditions to plan and execute initiatives to maximize shareholder value in the long-term
- Collected and responded to clinical quality measures to maximize client and systems outcomes
- Developed and executed strategic planning to ensure company innovation clinically and operationally

Regional Director of School-based Services

Aug. 2018-Feb.2021

- Oversaw and maintained both fiscal and clinical health of assigned region
- Provided supervision, clinical oversight, and training and development of Regional Coordinators, Educational and Behavioral Consultants and ABA Instructors consulting to public schools
- Developed a comprehensive training and onboarding sequence with an emphasis on application and instructional design that utilized the principles of learning for high fidelity implementation
- Provided clinical monitoring, auditing, and support for assigned team members and across all cases
- Provided training and program monitoring to schools and specialized collaborative school models
- Oversaw consultation to schools, families, and area agencies using the principles of ABA

- Completed district assignments, supervision pairings, and oversight of all consultant work
- Conducted monthly professional development meetings for all staff, offering training and continuing education credits on relevant topics needed for school-based consultative success

Regional Coordinator of School-based Services

Aug. 2017-Aug. 2018

- Oversaw and supervised school-based BCBA consultants in assigned region while maintained all responsibilities as a consultant, carrying a caseload of students
- Managed and assigned schedules and placement of school-based consultants
- Provided clinical support for all team members and cases as needed including overlaps, clinical integrity checks, and reviewing and monitoring of all plans and reports

Associate Educational and Behavioral Consultant

Aug. 2014- Aug. 2017

- Consulted to families, and schools using the principles of Applied Behavior Analysis
- Completed assessments aimed at determining present levels of performance (FBA, VB-MAPP, ABLIS-R, AFLS, SSIS) to drive the development of individualized interventions and programming
- Developed programming and data collection procedures, sheets, and other related materials to address skill accesses and deficits (curriculum, lesson plans, behavior support plans)
- Provided staff/parent training and monitoring for ABA curriculum and behavioral supports

Easter Seals: Jolicoeur Schools, Manchester, NH (Aug. 2012- Aug. 2014)

Behavior Specialist

- Developed a three-tiered system of behavior planning for residential and day students aged 11-22
- Created and conducted trainings relevant to ASD and ABA for all staff
- Assessed student behavior and skills using descriptive analysis, functional behavior assessments, and observation
- Developed, implemented and modeled Behavior Intervention Plans and data collection methods
- Conducted Behavior Committee Meetings to assess student progress and growth
- Worked collaboratively with related services (SLP, OT, MSW) to develop effective plans and supports

New England Center for Children, Southborough, MA (Aug. 2009- Aug. 2012)

Assistant Classroom Coordinator/Teacher

Aug. 2009- 2012

- Assisted in training interns and new staff on implementing educational and behavioral programming
- Managed classroom finances
- Attended meetings with Educational Coordinator and Program Specialist to review classroom progress
- Completed case management duties (progress reports, data summing, parent contacts and home-visits)
- Implemented individualized behavior and educational programs for students in home-based, preschool, and residential placements
- Assisted in the assessment and development of educational and behavioral programming

EDUCATION

M.S., Applied Behavior Analysis, *Western New England University*, Springfield, MA
Overall GPA **4.000**/ 4.000

August 2012

B.S., *St. Lawrence University*, Canton, NY
Major: Psychology Minors: Educational Studies and Sociology
Major GPA **3.808**/4.000 Overall GPA **3.705**/4.000

May 2009

Honors: Magna Cum Laude, Phi Beta Kappa Honorary, Dean's List (Spring 2005- Spring 2009), Faculty Scholar (Fall 2007-Spring 2009), Psi Chi Honorary

Certifications: Board Certified Behavior Analyst, Licensed Behavior Analyst in MA, Lean Six Sigma-Yellow Belt

PUBLICATIONS AND APPEARANCES

- Gamified Training: Curriculum and Measurement DIY, *The Association for Professional Behavior Analysts (APBA)*, 2023
- Fredericks, B.M., et al, (2022). Teaching Joint Attention: Assessing Generalization and Maintenance of Effects using Multiple Exemplar Training, *The Journal of Autism and Development Disorders*.

MEMBERSHIPS

Berkshire Association for Behavior Analysis and Therapy (BABAT)
Association of Professional Behavior Analysts (APBA)
Association for Positive Behavior Support (APBS)
New Hampshire Association of Behavior Analysis (NHABA), Former Treasurer (2016-2018)
Served as board member in NH for affiliated chapter of the Association of Behavior Analysis International



NICOLE KINNARD

BCBA

Profile

BCBA and educator with 19 years of experience focused on improving the lives of individuals with disabilities.



(850) 380-5681



Nicole.Kinnard@ssg-healthcare.com

EXPERIENCE

STEPPING STONES GROUP

IBSS Director of Clinical Operations

Present

- Conduct district needs assessments
- Develop and refine training content, service protocols and measurement systems
- Oversee the implementation of developed protocols and services
- Organize event planning for conferences and workshops
- Analyze district data to identify trends and opportunities for improvement
- Assemble, train and manage a team of professionals
- Provide support, supervision, guidance and additional resources and/or assistance to professionals
- Develop and maintain relationships with partners and stakeholders
- Participate in the strategic planning and decision-making processes

EDUCATION

UNIVERSITY OF WEST FLORIDA

Bachelor of Arts Degree in
Exceptional Student Education

2001-2005

UNIVERSITY OF WEST FLORIDA

Master of Arts Degree in Exceptional
Student Education with Applied
Behavior Analysis Cohort

2010

PROFESSIONAL LEARNING OPPORTUNITIES PROVIDED

- Accommodations vs. Modifications
- IEP Development
- IDEA
- Data collection
- Assessment and progress monitoring
- Differentiated instructional techniques
- Assistive technology
- Transition planning
- Behavior Strategies
- Social Skills
- Adaptive curriculum
- Strategies for teaching students with disabilities



NICOLE KINNARD

BCBA

EXPERIENCE

SANTA ROSA COUNTY SCHOOLS

Program Facilitator and BCBA

2017- 2024

- Collaborate and consult with professionals in Santa Rosa County School District- teachers, administrators, paraprofessionals, community members
- Create and presented workshops for different professionals (teachers, paraprofessionals, related services) on curriculum for students on Access Points and behavior techniques for students significant problem behaviors/language deficits
- Work jointly with the Coordinator of ESE on curriculum for students on Access Points/modified curriculum
- Organized event planning for conferences and post secondary opportunities
- Analyze district data and provide recommendations for improvement
- Create, analyze and oversee ESE department yearly budget of 100,000
- Attend and collaborate on IEP (Individual Education Plan) for students
- Create pacing guides for students with language delays
- Autism Team Lead
- Onboard contract services including credentialing
- Oversee staff through contracted services
- RFP representative
- Oversee implementation of behavior initiatives for 70 PreK and CBSE classes

COMMUNITY

AUTISM PENSACOLA KIDS FOR CAMP-LEAD COACH

- Provided support of assistant coaches, lead teachers, and instructor
- Provided training for all staff members
- Oversaw 20+ staff members
- Conducted weekly assessment on lead teachers and instructor
- Set up and implemented schedules for both adults and students
- Managed and assisted teachers in all rooms with accurate data collection

2006-2011

AWARDS CERTIFICATIONS

- Board Certified Behavior Analyst
(Passed 2012)
- Hold current Florida Teacher
Certifications in Elementary Education,
ESE K-12, Pre-K/Primary, ESOL
- Santa Rosa County Schools LEAP Award
Recipient



NICOLE KINNARD

EXPERIENCE

ESCAMBIA COUNTY SCHOOL DISTRICT

Teacher (Autism and ESE)

2006- 2012, 2016

- Created and executed lesson plans that adhere to county and state guidelines
- Write and execute IEP (Individual Education Plan) for students
- Conduct assessments to determine student's strengths, weaknesses, and individual needs
- Collect and analyze student data
- Write, implement, and assess educational objectives
- Train teachers and staff for students with Autism Spectrum Disorder
- Communicate regularly with parents and other stakeholders to provide updates on student progress and discuss concerns
- Adhere to federal and state laws and regulations regarding Special Education
- Participate in professional development activities to stay current on best practices in Special Education
- Collaborate with general education teachers, support staff, service providers and parents to develop and implement effective strategies for supporting students with disabilities in the general education classroom
- Monitoring and managing student behavior to create a safe and productive learning environment
- Provide accommodations and modifications to help students access the general education curriculum

SACRED HEART HOSPITAL-AUTISM CENTER

Lead Board Certified Behavior Analyst

2012-2016

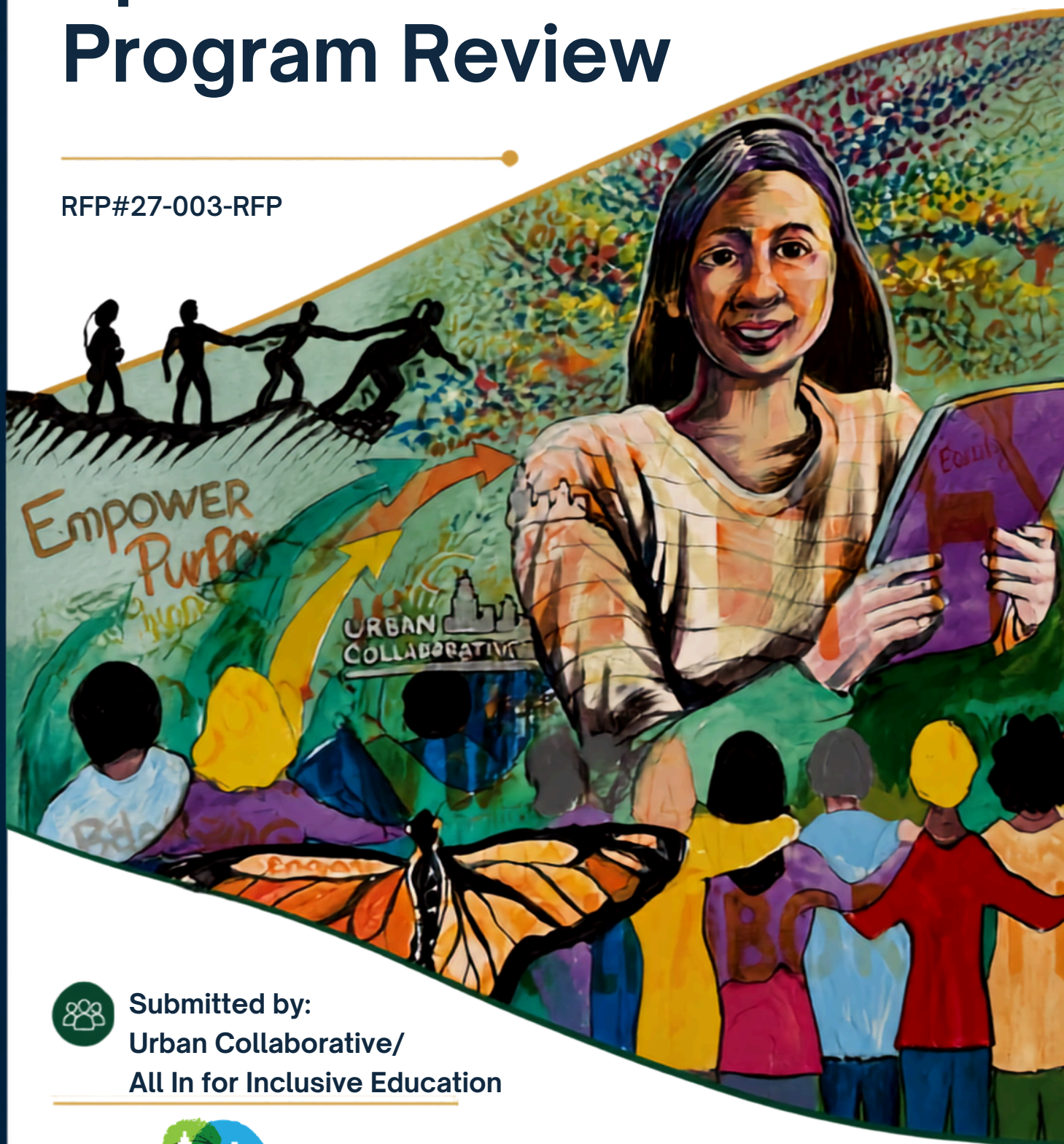
- Facilitator for new staff orientation and training program
- Scheduling for clients and employees
- Maintained financial billing records
- Oversaw medical billing for services
- Onboarded new clients
- Tracked and analyzed data
- ITDS Coordinator
- Participated in ADOS testing
- RBT Program Manager
- BACB supervision

SKILLS

- Presentation and Facilitation on Exceptional Student Education topics
- Time Management
- Communication
- Conflict Resolution
- Event Planning
- Program Development
- Data Analysis
- Maintaining financial records
- Interdisciplinary consulting and collaborating

Request for Proposal for a Special Education Program Review

RFP#27-003-RFP



Submitted by:
Urban Collaborative/
All In for Inclusive Education

Westport Public Schools

RFP Proposal

Urban Collaborative

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I. Cover Letter and Certification

To: Tom Scarice, Superintendent of Schools
From: Urban Collaborative @ All In for Inclusive Education
Re: Cover Letter and Certification - RFP#27-003-RFP
Date: September 1, 2026

Please accept this proposal for Westport Public Schools' Special Education Program Review RFP#27-003-RFP. We believe that our work conducting district reviews since 2006, work we understand has supported many districts' transformational change, align well with Westport's goals of a review that "move[s] beyond procedural compliance and examine[s] whether the District's continuum of services is aligned to student needs, supports placement in the least restrictive environment ("LRE"), is delivered with fidelity and consistency, produces meaningful outcomes and experiences for students, and uses human and financial resources effectively." We look forward to working with a district that welcomes such a comprehensive examination and anticipated transformational recommendations to improve practices.

- Legal entity and firm name: Urban Collaborative @ All In for Inclusive Education
- Primary contact: Lauren Katzman (lkatzman@allinforinclusiveed.org)
- Authorized signatory: Michele Gardner (michele@allinforinclusiveed.org)
- Partners/subcontractors, if applicable: We do not have partners or subcontractors.
- Confirmation that proposal is valid for at least 120 days: This proposal is valid for at least 120 days.
- Identification of any material changes since RFQ #26-025-RFQ:
 - We have added 2 district leaders as part of the Urban Collaborative team
- Confirmation of acceptance of all mandatory proposal commitments: We accept all mandatory proposal commitments.
- Identification of any requested exceptions: We are not requesting exceptions.

Sincerely,
Lauren Katzman, Ruchika Chopra, Michele Gardner

Lauren Katzman, Ed.D.
Co-Executive Director, Urban Collaborative
lkatzman@allinforinclusiveed.org

Ruchika Chopra
Co-Executive Director, Urban Collaborative
rchopra@allinforinclusiveed.org

Michele Gardner
CEO, All In for Inclusive Education
michele@allinforinclusiveed.org

II. Understanding of Westport and Proposed Review Questions

Our Understanding of Westport's Goals

Westport Public Schools (WPS) is requesting a “comprehensive, independent, system-level review of the District's PK-12 special education programs and services, including transition and 18-22 programming where applicable.”¹ Importantly, the district is looking for an in-depth review to assess current practices and provide recommendations to improve practices supporting student outcomes. Specifically, the review is intended “to move beyond procedural compliance and examine whether the District's continuum of services is aligned to student needs, supports placement in the least restrictive environment (“LRE”), is delivered with fidelity and consistency, produces meaningful outcomes and experiences for students, and uses human and financial resources effectively.” We look forward to working with a district that welcomes such a comprehensive examination and anticipated transformational recommendations to improve practices.

Westport School District is located in Fairfield County, Connecticut. District enrollment is close to 5,200 students with approximately 770, or close to 15% students with disabilities. The district has nine schools (1 preschool, five elementary, two middle, and one high school).² As it relates to race and ethnicity, during the 2024-25 school year 6.3% of students were Asian or Native Hawaiian/Pacific Islander, 2.1% Black/African American, 8.6% Hispanic/Latino, 75.7% White, and 7.3% Multiracial. English learners (or multilingual learners) are 1.1% of the student population, and 2.8% of students in the district are on free and reduced lunch.³

Academic outcomes for all students in WSD are relatively high. However, outcomes for students with disabilities are lower than those without. As special education is meant to level the playing field between students with and those without disabilities, and further, only a small minority of students with disabilities have cognitive impairments, in the ideal, academic outcomes between the population of students with disabilities and the overall student body should be relatively commensurate. A review can support the district to understand why, with the district's generally high graduation rates, there is a gap between students with disabilities (83.5%) and all students (95.8%).⁴ And why there is a gap in academic outcomes, with the ELA District Performance Index (DPI) for all district students at 81.2 and for students with disabilities, 61.1 and for math 80.3 vs. 57.3.⁵ What needs to change for this gap to decrease? Further, how can addressing this gap raise the bar for all students in the district?

¹ Unless otherwise specified, quoted text is from the RFP.

² [Westport Public Schools](#)

³ [EdSight.CT - District Profile and Performance Report: 2024-2025](#)

⁴ Ibid

⁵ Ibid

One factor known to lead to improved outcomes for students with disabilities is how much time a student with a disability spends in general education. Nationally, 73% of students with disabilities spend 80% or more of their time in general education. In Westport, 76% of students with disabilities spend 80% or more of their time in general education. This data indicates that the district is doing well in including students in general education. The question is, what else might account for the gap? Does the district have effective specially designed instructional practices? Does the MTSS model weave in special education or is it separate? This review can help the district find ways to minimize the gap between students with and those without disabilities.

The district is well-positioned to make good use of a comprehensive review. As described by the state reporting system, WPS reports that they have “made meaningful strides in improving programs and services for students with disabilities [by] strengthen[ing] transition services... expand[ing] professional development in multisensory reading instruction... [and providing] ongoing training to address the academic, social, and emotional needs of diverse learners.”⁶ The district has also “broadened its use of the Response to Intervention (RTI) framework... [by adding to academic instruction a focus] on behavior, helping staff respond proactively to truancy and behavioral concerns.”⁷ Further, the district has implemented recommendations from a review conducted by Cooperative Educational Services in 2017-18 such as elevating the Director of Pupil Services to better align special and general education.⁸

Our Understanding of Westport’s Review Questions

Westport Public Schools is focused on transformational work, asking 10 targeted and insightful guiding questions with the expectation of receiving actionable recommendations to assure each are addressed. These questions ask for important information, such as student outcomes and meeting timelines, and they go deeper, asking how the district understands its work, whether the work is not only effective, but appropriate, what are the trends in gaps between students with and without disabilities and are they measured with the right information, and are current resources effective? The district is also focused on the experiences of students, families, educators, providers, paraeducators, administrators, and other stakeholders.

When we work with a district, we do not only focus on addressing the “what” with technical questions and recommendations. We also focus on the “why” seeking to understand how stakeholders understand what is working, but what is getting in the way of closing the gap between students with and those without disabilities. If we are able to raise the bar for students with disabilities, we will raise the bar for all students.

⁶ Ibid

⁷ Ibid

⁸ [Parents, board differ on special ed study goals](#)

Each of these questions will be addressed through this review through examining student-level data, through asking those that are providing and those on the receiving end of special education what they believe works and what are the barriers, through examining data through the lens of the civil rights legislation that are the foundations of special education, and by examining what we know through research and practice work.

Westport's Review Questions:

1. To what extent is the District's PK-12 continuum of services, including transition/18-22 programming sufficient, consistently understood, and aligned to student needs?
2. To what extent do early intervention, MTSS/RTI, referral, evaluation, IEP development, placement, and progress-monitoring practices support appropriate and timely services?
3. To what extent are services and supports described in IEPs implemented consistently and effectively at the system level?
4. How effectively does the continuum support LRE, inclusion, access to curriculum and extracurricular experiences, and student progress?
5. What patterns are evident in academic, behavioral, social/emotional, graduation, and transition-related outcomes?
6. What trends and gaps are evident over time between students with disabilities and students without disabilities in academic achievement and growth, and what measures does the District use to determine grade-level progress or mastery and communicate progress to families
7. How do students, families, educators, providers, paraeducators, administrators, and other stakeholders experience the system? How do these stakeholders experience the system if/when there is a disagreement with a proposed program or placement?
8. What factors contribute to outplacement, and where may opportunities exist to strengthen in-district capacity while preserving individualized decision-making?
9. How effectively are staffing, professional learning, time, services, spending, and other resources aligned to student needs and outcomes?
10. What actionable, prioritized changes should the District consider in the short, medium, and longer term?

III. Detailed Methodology and Work Plan

Methodology

The Urban Collaborative's approach aligns well with the district's goal of an in-depth study moving past a sole focus on procedural compliance and large-scale outcomes to include an examination of adaptive, looking at why the outcomes are what they are. We approach our work with a focus on protecting the civil rights of students with disabilities, as outlined in Section 504 of the Rehabilitation Act of 1973, and we are guided by the purpose of special education, which under the Individuals with Disabilities Education Act (IDEA), is to “ensure(s) that the rights of children with disabilities and parents of such children are protected” and to provide students with disabilities a “free and appropriate public education” in the “least restrictive environment” to prepare students for “further education, employment, and independent living.”⁹ We achieve the objective of supporting the district in providing a higher standard of special education by first understanding Westport Public School's current state of effectiveness, which becomes the baseline, then understanding why the outcomes are what they are, and together we develop our recommendations. With our findings and a set of draft recommendations we invite the district to work with us to assure that we have addressed all questions and that our recommendations are created to align with the district's mission of “prepar[ing] all students to reach their full potential as life-long learners and socially responsible contributors to our global community.”¹⁰ In working collaboratively throughout the process, we have found that districts take what we learn, as we learn it, to move towards improved practices. In the end, our recommendations should help minimize the negative impact of students' disability and maximize the opportunities for students with disabilities to not only participate, but to thrive in general education (Hehir, 2005).

We base our analysis and recommendations on a robust array of data. We collect and analyze documents that describe and guide practices and policies related to special education. We collect and analyze a representative sample of IEPs in order to understand how these practices are operationalized for students, as well as how inclusive they are of the voice of students and families. We conduct surveys, focus groups, and interviews with special and general education staff at the district and school level, as well as families of students with disabilities, and where appropriate, students to understand their perspectives and experiences. We conduct onsite school visits and classroom/program observations to observe the connection between policies, guidance, stakeholders' understanding, and practice. We collect and analyze information on district resources. We collect and analyze student- and district-level data from both students with and without disabilities to examine population trends and the effectiveness of services. We disaggregate this data by disability type, educational environment, grade level, free/reduced lunch status, gender, race/ethnicity, and multilingual learner status. Where possible, we collect and compare state and federal data with district data.

⁹ Individuals with Disabilities Education Act, 20 U.S.C. § 1400 et seq. (2004).

¹⁰ [Westport Public Schools](#)

Our team compiles and analyzes all of the collected quantitative and qualitative data, which we compare with evidence-based practices and research and legal mandates to create a draft of short-, medium-, and long-term recommendations that are actionable and focused on improved outcomes for students with disabilities. We work with the district to assure that our observations are complete, and our recommendations will benefit and are tailored to supporting the district's growth. Once clarifications are complete, we finalize a report developed as a presentation. With this format districts can use in full or in parts for both presentations and professional learning. To aid in this transformational work, each recommendation is accompanied by a set of resources. Throughout this process, as we are in communication with the district sharing what we have learned, we have found that districts typically start the work before our process is complete.

Work Plan

Project Initiation, Governance, and Management

Our review will begin, as required in the RFP, with "a kickoff meeting with District leadership to confirm review questions, scope, data sources, project roles, communication protocols, confidentiality expectations, and deliverables." At this meeting, we will:

- Decide on communication paths, with Urban Collaborative's co-executive directors Lauren Katzman and Ruchika Chopra who have the authority to manage all aspects of the review, including communication and scheduling.
- Decide on regularly scheduled check-ins/updates between Westport's point of contact and Urban Collaborative's co-executive directors.
- Provide a more detailed project management plan that includes "milestones, responsible parties, onsite and virtual work, meeting cadence, decision points, dependencies, risks, and mitigation strategies."
- Provide a data/document request list, such as this draft data request that we have used in other reviews and will amend to address Westport data. Create processes that minimize the burden on staff, students, and families by scheduling times with them that align with their schedules, such as evening meetings with families, and providing communication to school-level staff that assure them that we are focused on understanding the system. We will not be reporting on individual staff or schools.

Continuum, LRE, Service Delivery, Access, and Outcomes

Through the comprehensive array of data collection and analysis, including documents, data on education placement, and student outcomes, survey, interview, focus group, and observational data, and our IEP review, we will have the ability to assess the effectiveness of Westport's special education supports and services. A focus on the review questions stated above will yield information on what is working and what are the barriers as they relate to several key areas of a highly effective district's implementation of special education - the continuum of special education supports and services, inclusive educational placements (LRE), effective services delivery, access to the general education class and general education curriculum, and student outcomes. In addition, this review will support effective transitions between grade spans and

post high school, effective and appropriate staffing models, and in general, educational benefit for all students with disabilities.

- *Continuum of special education supports and services* - We will examine the full continuum of special education services and whether options are individualized and focused on providing specially designed instruction and access to the general education curriculum. Through a combination of our data analyses, we will examine the continuum throughout the system, examining early intervention, inclusive and co-taught settings, resource services, intensive/specialized supports, related services, behavioral/mental-health/social-emotional/therapeutic supports, outplacement, and transition/18-22 programming.
- *Placement and service delivery* - Through data analyses, such as from our IEP review and interviews with staff and families, we will be able to understand how placement and service-model decisions are made, whether services are matched to student need, and whether students are supported in the least restrictive environment appropriate to their individual needs.
- *Consistency of services* - Our observations and IEP review will allow us to understand whether there is service-delivery consistency across schools and programs at the system level.
- *Early identification* - Through analyses of student-identifiable data and surveys, interviews, and focus groups with staff and families, we will understand whether early identification, intervention, MTSS/RTI, referral, evaluation, and transition pathways are consistent and effective.
- *Access to general education class and general education curriculum* - Through student-level data analyses, document review, and surveys, interviews, and focus groups we will be able to assess whether students with disabilities have the same access to educational opportunities as their peers without disabilities, whether this be academic courses, electives, or extracurricular activities.
- *Effective transition between grade spans and post high school* - We will examine transitions from preschool to elementary, elementary to middle, middle to high school, and high school to transition and postsecondary pathways for students 18-22 in order to understand both student experiences and to be able to gauge coherence and consistency across the district.
- *Staffing models and professional learning* - Through document reviews staffing data, and surveys, interviews, and focus groups with staff, we will be able to assess and provide any needed recommendations related to staffing models, professional learning, training, supervision, role clarity, and support for special education teachers, related service providers, paraeducators, administrators, and other staff supporting students with disabilities.
- *Overarching educational benefit* - Through our IEP review, surveys, interviews, and focus groups with students, families, and staff, and students outcome, we understand if the district has been able to provide an educational benefit through special education.

Findings, Recommendations, Reporting, and Initial Action Planning

We base our analysis and recommendations on the robust array of data we have collected, including information from student-level and district-level data (PK, K-12), surveys, interviews, focus groups, documents, IEP reviews, and observations. We engage in the process of continuous meaning-making, as Patton (1980) explains an “inductive analysis... the patterns, themes, and categories of analysis come from the data; they emerge out of the data rather than being imposed on them prior to data collection and analysis” (Patton, 1980, p. 306). We compare the collected data to understand the strengths and areas of growth in the Westport School District and create recommendations to strengthen, stabilize, and sustain the district’s high-performing inclusive system.

Each recommendation will include resources to help the district with implementation. Each will also include a rationale, supporting evidence, whether we believe it to be a short-, medium-, or long-term priority, what dependencies are key to its implementation, what resources are required, whether they be human or materials, and how to measure progress.

Throughout the entire process, we will be briefing the district as to our findings and recommendations. We will include in our briefings to District leadership on emerging themes, data limitations, and questions requiring clarification. We will conduct at least one significant working session to discuss initial prioritization and next steps.

Our final report will be a public document that includes an executive summary; review questions; methodology; data sources and limitations; findings and evidence; strengths/commendations; areas for improvement; and prioritized recommendations.

Our experience has taught us that our reports are most effective when in the form of a presentation, allowing the district to make use of the document as a teaching tool, to pull data as needed, to present all or parts of the review, and to utilize the resources we provide that are aligned to the recommendations. In the past, we have seen written reports of over 100 pages sit unused or the district has had to take the written document and develop from that a presentation. We have done this work for the district and have found that we can include more than what is in a written report, such as the connection of a vast array of resources aligned to each recommendation.

In districts where we have conducted reviews and in some where we have been monitors of implementing recommendations based on litigation, we have taken district leadership through coaching that supports continuous improvement through 100-day cycles of inquiry. We would welcome this work with the district.

Information on the review components listed below are found in the following proposal sections:

- *Family and Staff Surveys and Stakeholder Engagement (Section IV)*
- *Onsite School Visits and Classroom/Program Observations (Section V)*
- *Document, IEP, Data, Benchmarking, and Resource Analysis (Section VI)*

IV. Family and Staff Surveys and Stakeholder Engagement Plan

As the district states and we agree, “family and staff surveys and stakeholder engagement are central components and a high priority of this review.” We find that the perspectives of those responsible for or the recipients of the work we are examining is required to understand why some practices work and others do not. After doing this work for many years, we have found that with minimal direction and with the expectation of confidentiality, staff, families, and students are eager to share working, what is not working, why for both of these, and what they believe the district should do to improve outcomes for students with disabilities.

We look for a wide array of stakeholders in order to capture a full picture and to assure the district community that all voices are included in our findings and recommendations. We promise confidentiality, committing to all that there will be no identifying information in our report. Because we do this, our findings are reported only in aggregate and de-identified. We are looking at the system and we are finding themes. We are not addressing individual complaints.

Our unit of analysis is the district. All data we examine is to help guide us in reviewing the system as a whole. We are not focused on any one school, staff member, etc. We will also only use relevant data information that is triangulated with other data we have collected. In our data we look for patterns, and as the RFP states, “distinguish[ing] isolated experiences from corroborated patterns.”

The tools we use for stakeholder engagement are surveys, interviews, and focus groups. We use consistent protocols that are “designed to capture varied perspectives across levels, programs, disability profiles, placements, and service intensity.” After years of experience, we have found that stakeholders believe that they know what is working, not working, and why and they are eager to share that information. For this reason, we use a short protocol of a minimal number of questions and we probe for understanding to assure we understand the full breadth of their experience and to assure that we have the varied perspectives we seek.

Surveys: We will reach out to a diverse group of stakeholders with a survey that asks questions that include what is working, where do systems break down, what feels sustainable and unsustainable, what supports are provided and what supports are missing, and what would you protect at all costs? While surveys will be short in order to invite more participation, we will ask in more detail about effectiveness of communication, experiences with the IEP process, access to and effectiveness of services, social emotional supports, and transition services. All surveys will include open-ended response opportunities. We will analyze survey data with quantitative Likert scale analyses and qualitative coding of open-ended responses.

Our staff survey will include, as the RFP requires, a “balanced set of central office leaders, school administrators, special education and general education teachers, related service providers, paraeducators, mental-health/behavior staff.” If appropriate, we can add in school board members. Our family surveys will include all families of students with disabilities. Where appropriate, and with district agreement, we ask middle and high school students to participate.

Survey results will be analyzed first by role (families, students, staff) and within staff roles (central office leaders, school administrators, special education and general education teachers, related service providers, paraeducators, mental-health/behavior staff). Our focus is systems, rather than isolated experiences. Once we understand the system-level trends within these roles, we will disaggregate trends across groups to raise findings.

Surveys will be developed and implemented using Google Forms. We will not collect any identifying information. We will ask participants to provide their broad grouping, such as district administration, school administration, special education staff, general education teachers, family of a child with a disability, and student. As we will not collect any identifying information, this is a system that is secure for our use. It is also a platform that is relatively simple to use on a computer or a phone. We will provide the survey in English to staff. We will provide the survey in whatever language a family member or student requests, starting with the option of Spanish.

Our response rate should be high, as we take the following steps: providing anonymity, developing a short survey, providing the survey in whatever language a family member or student needs, assuring participants that only the Urban Collaborative team has access to responses. We will share the survey shortly before our site visit and keep it open shortly after our visit. This will allow us to ask participants if they have completed the survey, and for those hesitant, there is time for us to discuss with them.

Interviews/focus groups: In order to understand how special education works within the overall system, we reach out to a diverse group of interviewees and ask questions that may include what is working, where do systems break down, what feels sustainable/unsustainable, what supports are provided and what supports are missing for behavior, and what would you protect at all costs?

Participants include district leadership, district special education leadership, school leadership, special education teachers, general education teachers, paraeducators, and related service providers. We reach out to families of students with disabilities, and where appropriate, and with district agreement, we interview students in middle and high school. Based on the participants’ role, we decide whether a person is in an one-to-one interview or a group focus group. Our goal is to better understand the “why” behind the data of whether and how students are receiving educational benefit from the special education supports they receive. All information from interviews and focus groups remain anonymous. We conduct interviews/focus groups in person and virtually, as decided with the district. We decide on whether there is a one-to-one interview or group in a focus group depending on the detail we believe we can learn from each format and

in conjunction with the district. For example, we would likely have a one-to-one interview with the Superintendent, and a focus group of teachers. Interviews will last for 45-minutes or a more appropriate time based on individual schedules. Focus groups will span one-hour to allow for more voices to be heard.

As specified in the RFP and as we would do even if not specified, we will:

- Conduct interviews and focus groups with a “balanced set of central office leaders, school administrators, special education and general education teachers, related service providers, paraeducators, mental-health/behavior staff, students where appropriate and approved, and families of students with disabilities.” If appropriate, we can add in school board members and local advocates. The more voices included, the more people’s experiences are reflected in the review, the more the recommendations of the review will be considered valid.
- Use consistent protocols that are “designed to capture varied perspectives across levels, programs, disability profiles, placements, and service intensity.” After years of experience, we have found that stakeholders believe that they know what is working, not working, and why and they are eager to share that information. For this reason, we use a short protocol of a minimal number of questions and we probe for our own understanding and to assure that we have the varied perspectives we seek.
- “Distinguish isolated experiences from corroborated patterns” by only using as relevant data information that is a pattern, not something from a small number of individuals. We are looking for patterns to address symptoms. We are not focused on any one school, staff member, etc. We will also only use relevant data information that is triangulated with other data we have collected.”
- Assure all participants that their input is held in confidence. We do not use any identifying information in our interviews. Because we do this, our findings are reported only in aggregate and de-identified. We are looking at the system and we need themes. We are not addressing individual complaints.

For both the surveys and interviews/focus groups, we will report rates of participation, subgroup representation, potential nonresponse bias and limitations.

V. Site Visit and Observation Plan

As the RFP states, “onsite visits and observations are central components and a high priority of this review.” Our observations will focus on better understanding the system. We will not be focused on individual staff or schools. We use data from observations to triangulate information that connects policies, guidance, stakeholders’ understanding, and practices.

We plan to observe in all 9 schools (1 preschool, five elementary, two middle, and one high school) in order to assure valid cross-school and districtwide findings over a three-day period of time. We will have two team members conduct all observations. This allows for cleaner inter-rater consistency. Our team will observe in two schools each morning, one school each afternoon, and the remaining part of the day finalize notes, coordinate findings, etc.

As specified in the RFP, we will observe in a “representative range of general education/inclusion settings, co-taught classrooms, resource supports, intensive and specialized programs, related service delivery where appropriate, clinical/therapeutic or behavioral supports where appropriate, transition/18-22 programming, and nonacademic or extracurricular contexts where feasible and relevant.” We will decide on how many observations in each school once we have a clear picture of all of the special education services across the district. We will coordinate observations with the District and the schools so as to minimize disruption and assure that we are not evaluating or publicly identifying individual students or staff.

We will observe using the [Effective Inclusive Classroom Observation](#) protocol that we have developed based on the [Inclusive Practice Tool: What to Look For—Observations](#), a tool developed by the Massachusetts Department of Elementary and Secondary Education (MA DESE). This tool is designed to “identify, reinforce, and support educator practice in inclusive classrooms.” We are able to focus on “LRE, access to grade-level instruction, specially designed instruction, service model implementation, student engagement, instructional supports, accommodations/modifications, independence, belonging, and inclusion.”

We will search for cross-school consistency/variation, cross-program consistency/variation, districtwide patterns, strengths, and implementation gaps. The observation team will aggregate observation findings and triangulate them with data, documents, surveys, and stakeholder input.

VI. Data, IEP, Benchmarking, and Resource Analysis Plan

Student-Level Data: Student-level data describes student outcomes, or the “what” of a district review. We examine student-level data (PK-12) from the last full school year for students with and without disabilities. We examine academic achievement, graduation, time in general education (LRE), time out-of-class (absenteeism and disciplinary actions) and any other relevant factors related to the effectiveness of services that are uncovered during the review. We disaggregate data by disability type, LRE in district and with outplacements, special education program, grade span/level, free/reduced lunch status, gender, race/ethnicity, and multilingual learner status in order to uncover targeted areas to address. We evaluate referral and evaluation patterns, as well as data on progress monitoring and MTSS/RTI, LRE/placement. Our goal will be to show and understand the effectiveness of special education for students with disabilities in Westport, including outcome and growth data.

We will benchmark data from Westport against state and federal data where available and appropriate and we will benchmark Westport data against Connecticut's [District Reference Groups](#) (DRGs). DRGs are groups of districts linked together with similar socioeconomic and enrollment characteristics and are used for educational comparisons. There are 5 groups, ranging from most to least affluent, with Westport falling in Group A, the most affluent along districts such as Avon, Darien, Easton, New Canaan, Region 9, Redding, Ridgefield, Simsbury, Weston, and Wilton.

Individualized Education Programs (IEPs): We will collect and analyze a representative sample of IEPs to assess whether they are clearly developed to provide students with educational benefit where there is alignment between present level, student need, goals/objectives, specially designed instruction, accommodations/modifications, educational placement and progress monitoring. Criteria for a representative sample and the ability to disaggregate data in analysis include age, grade span, disability classification, educational placement, race/ethnicity, gender, multilingual status, and school. We will have two team members conduct this work so that inter-rater reliability is more clearly defined as they will start with reviewing the same IEPs until interrater reliability is attained, and throughout the process, continue to check in regularly to assure the continuation of reliability and confirmation of findings. The team will analyze patterns by school level, program, disability category, placement type, and other relevant variables. These data will be triangulated with all other data to create robust findings. We will request from the district a representative sample of IEPs as they relate to LRE/program, disability type, grade span, gender, race/ethnicity, multilingual learner status, and school.

Document Collection and Analysis: We will collect and examine documentation related to the district's special education policies and practices. This will be decided in conjunction with the district and should include, but will not be limited to the district's overarching strategic plan,

special education strategic plan, organization structure, policies and procedures related to special education, descriptions of special education services, staffing guidance, caseload guidance, professional learning plans, union agreements related to the provision of special education, and any other relevant guidance documents.

Resource Analysis Plan: In order to “analyze staffing and resource allocation, special education spending patterns, outplacement costs, and cost-effectiveness at a system level in relation to student needs, services, placements, and outcomes,” we will collect data on number and costs related to special education staffing, including district leadership, school-level personnel, related services providers (including paraeducators) and transportation. We will also review Medicaid reimbursement processes and funds. This analysis will examine how and whether resources are used effectively and efficiently to support effective outcomes for students with disabilities.

VII. Proposed Team and Level of Effort

Urban Collaborative: The [Urban Collaborative](#), started in 1994, is a national membership organization of special education district leaders from more than 100 school districts. We are focused on promoting equitable, effective, and inclusive special education supports and services, as well as decreasing the disproportionate representation of culturally and linguistically diverse student populations in disability services and disciplinary actions. As a group, we collaboratively develop, share, and influence knowledge, research, and policies.

We hold member meetings that provide opportunities to connect with district leaders from across the country and cover a variety of impactful topics including youth empowerment, anti-racist practices, developing comprehensive systems of general and special education practices and more. Member meetings provide opportunities for engaging members in a professional learning community, providing a space to discuss complex issues, networking, and leadership development. We also provide monthly virtual professional learning opportunities focused on topics requested by members and designed to support building effective, equitable, and inclusive school systems.

The Urban Collaborative is part of [All In for Inclusive Education](#), a non-profit organization based in New Jersey. All In is committed to advancing inclusive education as a fundamental civil right for students with disabilities. By working directly with schools, educators, and administrators, the organization aims to create equitable learning environments where all students, both with and without disabilities, are supported and empowered to thrive. Grounded in over 30 years of research and legal support through the Individuals with Disabilities Education Act (IDEA), All In for Inclusive Education strives to build socially just, inclusive communities where every individual has the opportunity to reach their full potential. They do this through professional development for educators and consultation and coaching for schools. In July of 2025 The Urban Collaborative brought its focus on district-level special education systems to support All In's work with schools and classrooms.

District Reviews: In addition to supporting our members through in-person member meetings and virtual professional learning opportunities, the Urban Collaborative conducts district reviews to evaluate a district's management of special education support and services. We work closely in partnership with districts and their schools, staff, and families to collect and analyze qualitative and quantitative data in response to critical questions and recommend enhancements to practices, policies, and organizational structures that help improve student outcomes. We disaggregate data in a variety of views, including race, gender, and multilingual status in order to understand if there is any over- or under-representation in disability categories, placement, or discipline.

To date, the Urban Collaborative has conducted 47 reviews.¹¹ In these, we provide analyses of current student outcomes, district practices, recommendations, and resources to help districts build their capacity. For some, we provide leadership coaching to implement recommendations.

We will assemble a team of professionals with a track record of conducting effective special education reviews. People on this team will have had or are currently managing district-level special education services and come with deep experience and expertise in special education research, policies, and practices. In every review the Urban Collaborative conducts, we add at least one team member who is currently working as a district leader in special education and a data analyst.

We are a team that believes in this work. We have seen changes that have come out of district reviews. As leaders, we have had district reviews on our work and have used this external view to help us make needed changes. We also believe that we will conduct a relevant, complex but accessible review that will support Westport School District in their focus on improving outcomes for students with disabilities.

Urban Collaborative Team

For this review, we have assembled a powerful team that includes:

- Lauren Katzman, Ed.D., - Co-Executive Director, Urban Collaborative
- Ruchika Chopra - Co-Executive Director, Urban Collaborative
- Carrie Parker, Ed.D. - Co-director and lead of quantitative and applied research - Multilingual Learning Research Center (MLRC) at the Wisconsin Center for Education Research.
- Sonya McElroy - Director, Birth-5 Programming and Service Accountability - Anne Arundel County Public Schools, Maryland
- New York City Department of Education District Leader (to be named if we are awarded)

Team members will hold these roles in the review process:

- Katzman - Project Director/Manager
- Chopra - Project Director/Manager
- Parker - Data analyst
- McElroy - Observations, IEP Review
- NYC DOE - Observations, IEP Review, Resource Review

Team members bring these areas of subject-matter expertise:

- Katzman - District leadership, systems change, qualitative research, High-incidence disabilities
- Chopra - District leadership, systems change, low-incidence disabilities
- Parker - Quantitative and qualitative research, multilingual learners (ML), Intersection of disability and MLs
- McElroy - Systems change, district leadership, early childhood

¹¹ [List of UC District Reviews](#)

- NYC DOE - Systems change, district leadership, school leadership, district budgeting and resource allocation, supervision

Anticipated hours/days, and percentage of total project effort:

- Katzman - 100% of total project, onsite 4 days
- Chopra - 100% of total project, onsite 4 days
- Parker - Data analysis 4 days
- McElroy - Onsite 3 days, analysis 3 days
- NYC DOE - Onsite 3 days, analysis 3 days

Connecticut experience:

- As stated above, the Urban Collaborative has conducted 47 district reviews. As it relates to Westport Public Schools, we have experience reviewing special education in four (4) districts in Connecticut:
 - Bridgeport (2022)
 - Norwalk (2020)
 - West Hartford (2008)
 - Hartford (2006)
- In addition, Greenwich Public Schools is an active member of the Urban Collaborative.

Team Member Bios



Dr. Lauren Katzman, Ed.D., Urban Collaborative, Co-Executive Director has held higher education positions as Associate Research Professor at Arizona State University, Associate Professor of Special Education at Boston University, and adjunct professor at the Harvard Graduate School of Education. Katzman has served as the Assistant to the Superintendent for Special Education for the Newark Public Schools and the Executive Director of Special Education in the New York City Department of Education. In both of these positions, she developed and led significant reform efforts, increasing academic achievement, inclusive educational and experiential options, reliable data management, and

statutory/regulatory compliance. She worked to develop strong interdisciplinary partnerships between districts, states, universities, advocacy groups, and communities to build the foundation for deep and sustaining systemic reforms. Prior to these two high-level and demanding school district leadership positions. Katzman co-authored the book *Effective Inclusive Schools: Designing Successful Schoolwide Programs* with Dr. Thomas Hehir, former Director of the Office of Special Education Programs at the U.S. Department of Education. She was also a special education teacher for 14 years in St. Louis, New Jersey, and New York City and has conducted over 20 program evaluations of the special education services including the

District of Columbia Public Schools, the state of Massachusetts, and the New York City Department of Education. [Katzman CV](#)



Ruchika Chopra, Urban Collaborative, Co-Executive Director is the former Director of the Office of Inclusive Education for New York City's District 75. Here, Chopra supported educators in 165 schools to include students with significant disabilities in general education classes. In her role in NYC, Chopra was instrumental in implementing the recommendation of the NYCDOE review. Chopra now works for the Urban Collaborative to create opportunities for members to connect with current research and to create avenues for collaboration. She has conducted six district reviews with the Urban Collaborative. [Chopra Resume](#)



Caroline (Carrie) Parker, Ed.D., is co-director and lead of quantitative and applied research at the Multilingual Learning Research Center (MLRC) at the Wisconsin Center for Education Research. She brings more than 25 years of experience leading research and evaluation studies looking at outcomes for multilingual learners, students with disabilities, and students that are dually identified. Parker has led impact evaluations of programs for students with significant cognitive disabilities funded by the Institute for Education Sciences and the Education Innovation and Research program of the Department of Education and has also received funding from the National

Science Foundation and the Hewlett and Schusterman Foundations. She has participated as the data expert on more than 20 district reviews of special education and multilingual learner programs. Parker's research includes quantitative studies of academic progress and reclassification patterns for English learners as well as studies funded by the Institute of Education Sciences examining the impact of a literacy intervention on reading levels of students with significant cognitive disabilities and the role of an innovative program providing students with intellectual disabilities access to college courses. [Parker CV](#)



Sonya McElroy, Director, Birth-5 Programming and Service Accountability - Anne Arundel County Public Schools, Maryland is a seasoned special educator with 24 years of experience, including 13 years as an early childhood special education teacher before transitioning into leadership roles. Currently living in Ellicott City, MD, with her husband and almost six-year-old daughter, Sonya has a background as a resource teacher and supervisor of special education. Throughout her career, she has developed innovative programs to support staff,

families, and the community in various Maryland public school districts. Sonya's passion lies in merging equity and special education to create exemplary inclusive spaces within public schools, aiming to transform perceptions of individuals with disabilities by addressing power dynamics and closing opportunity gaps. Her favorite pastime is spending quality time with her family, including their 29-year-old oldest daughter and five-year-old grandson. [McElroy Portfolio](#)

New York City Department of Education District Leader (to be named if we are awarded)

VIII. Potential Conflicts of Interest

The RFP asks us to:

- Identify any past (within the past 5 years) or present contractual or other relationships with the District or member of the Administration
 - We do not have any conflicts
- Identify any other factors you are aware of that could reasonably affect the independence of the review or give rise to a conflict of interest or appearance of a conflict of interest.
 - We do not have any conflicts

IX. Timeline and Project Management

Program Review Timeline

Phases	Nov	Dec	Jan	Feb	March	April
Phase 1: Project Initiation, Governance, Management						
Phase 2: Document, IEP, Data Benchmarking						
Phase 3: Interviews, Focus Groups, Observations		Virtual	On-Site	Virtual		
Phase 4: Analysis/Draft Report						
Phase 5: Report Finalization					Depending on district collaboration	
Phase 6: Presentation to Stakeholder Group(s)					Depending on district schedule	

Our process is divided into 6 phases of work, as listed above. Throughout each phase and aspect of the work, we build quality control checkpoints internally and we use our interim progress updates as a checkpoint with the district.

In Phase 1, once the evaluation is initiated we share a final project work plan and schedule, and review any questions we may have for each other. We will decide on regularly scheduled interim progress updates. Once contracts are signed, we will decide on a confidentiality/data management plan and request student-level data. We will also collect and review state, and national data. Our goal is to describe the district's student population and where appropriate, do this in comparison to state and national data.

In Phase 2 we will begin and continue throughout most of the process data analysis and benchmarking. At this point we start with a document and IEP review. We will provide for the district our detailed plans for the document and IEP review, as well as our plans for the stakeholder engagement, site visits, observations, and surveys.

In Phase 3 we will conduct in-person and/or virtual interviews and focus groups with, but not limited to, central administration, school administration, teachers (general and special education), related service providers (paraeducators, OT, PT, SpL), and families of students with disabilities.

In Phase 4 we compile and analyze all data (qualitative and quantitative) and provide the district with a draft report that includes key findings, strengths and areas for improvement, as well as a detailed data analysis including visualizations, and draft recommendations. The team works to assure that there has been a thorough examination of all pertinent areas and that the

recommendations are aligned with the district's overall strategic planning. We share this work with our district partners to begin the process of completing a report reflects the thinking of your reviewers, the Urban Collaborative, as well as working closely with the district to assure that we have not only covered all areas, but our ideas and even the language used to convey these ideas are accessible to the district.

In Phase 5 we develop our final report. The final report will include an executive summary, detailed findings, actionable recommendations, and a suggested prioritized roadmap, as well as supporting research and resources to support the district implementing recommendations. Our reports are typically in a presentation format. We have found districts can better use the information in this format, as they can use it to present certain aspects of the review. This format removes the step a district might have to take to present the information to a variety of stakeholder groups. Districts can also use the recommendations alongside the resources we provide as a teaching tool.

In Phase 6 we will present the review to the Board of Education, as well as other stakeholders decided upon with the district. The final report will be in an accessible PDF and editable format, including executive summary, methodology, data sources, findings, strengths, recommendations, limitations, and appendices.

X. Deliverables

The required deliverables will be aligned to the phases of the review, as shown in the chart below. Katzman and Chopra are responsible for all parts of the review, however, we do have different team members leading various aspects of the work:

- Data and document collection - Katzman & Chopra
- Student-level data analysis - Parker
- Document review - McElroy & NYC district leader
- Survey - Katzman & Chopra
- Interviews/focus groups - Katzman & Chopra
- IEP review - McElroy & NYC district leader

Phases	Schedule	Content
Phase 1: Project Initiation, Governance, and Management	Nov	• Final project work plan, review questions, schedule, communication plan, data request, and confidentiality/data-management plan
Phase 2: Document, IEP, Data Benchmarking	Nov-Feb	• Stakeholder engagement plan, sampling rationale and protocols • Site-visit and observation plan, structured protocol, and sampling rationale • IEP/record-review methodology, rubric/protocol, and quality assurance procedures • Approved family and staff survey instruments, administration and response-rate plans, and analysis plans
Phase 3: Interviews, Focus Groups, Observations	Dec-Feb	• Site-visit and observations
Phase 4: Analysis/Preliminary Findings/Draft Report	Feb	• Interim leadership briefing(s) and preliminary findings presentation or memorandum • Approved family and staff survey findings reports • Stakeholder engagement aggregate synthesis • Site-visit and observations aggregate synthesis • IEP/record-review methodology, rubric/protocol, quality assurance procedures, and aggregate findings
Phase 5: Report Finalization	March-Apr	• Draft final report for factual review
Phase 6: Presentation to Stakeholder Group(s)	March-Apr	• Final report in accessible PDF and editable format, including executive summary, methodology, data sources, findings, strengths, recommendations, limitations, and appendices • Board of Education presentation deck and presentation. • All nonproprietary project data files, coding frameworks, and instruments created specifically for the District, subject to contract terms and privacy requirements

XI. Data Privacy and Confidentiality

We will use appropriate data-quality checks, including investigating outliers, reviewing for duplicates, and consulting with district data staff to assure our analysis reflects accurate data. We will follow state-mandated data suppression rules, and will include key caveats or limitations in our reporting (e.g., variables with high missing values). We will clearly identify findings as correlational rather than causal to ensure that readers do not draw inappropriate conclusions from the findings.

For student-identifiable data, we need to assure that students' personal and academic information is not accessed by unauthorized parties who may disclose or misuse the information. This is especially important for students with disabilities. We strictly control how data is collected, stored, and shared. Our practices meet FERPA requirements.

For student-identifiable data, we will request that it be de-identified of student identifiers or we can immediately de-identify the data ourselves. We will collect and hold all data in a password protected Dropbox folder accessible to only the Urban Collaborative team and staff at Westport as decided upon between the district and Urban Collaborative. We will keep all data in this manner. No data will be transported through mail. We will suppress and not report on any student groups where there are 10 or fewer students. In consultation with the district, we will suggest destructing data after 3-years.

For our surveys, we use Google and never ask for identifiable information. We will ask participants if they are a general or special educator or a district or school administrator or a parent of a student with a disability.

XII. Exemptions and Assumptions

The RFP asks us to:

- List all exceptions, assumptions, exclusions, required District resources, or proposed changes to scope or terms. Silence will be interpreted as acceptance, subject to contract negotiation.
 - We have no exceptions or assumptions to list.

Appendix - Sample District Reviews

We have provided two redacted sample district reviews that we have completed.

- [Link](#) to redacted review - ABC Public Schools
- [Link](#) to redacted review - DEF Public Schools