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JAMES MADISON UNIVERSITY.

COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT

Contract No. UCPJMU7516

This contract entered into this 23rd day of June, 2026, by Educational Policy Improvement Center, dba Inflexion, hereinafter called the "Contractor" and Commonwealth of Virginia, James Madison University called the "Purchasing Agency".

WITNESSETH that the Contractor and the Purchasing Agency, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF CONTRACT: The Contractor shall provide the services to the Purchasing Agency as set forth in the Contract Documents.

PERIOD OF PERFORMANCE: From July 6, 2026 through July 5, 2027 with four (4) one-year renewal options.

The contract documents shall consist of:

(1) This signed form;

(2) The following portions of the Request for Proposal RFP SLD-1247 dated February 12, 2026
- (a) The Statement of Needs,
- (b) The General Terms and Conditions,
- (c) The Special Terms and Conditions together with any negotiated modifications of those Special Conditions;
- (d) Addendum No. One – February 23, 2026
- (e) Addendum No. Two – March 2, 2026
- (f) Addendum No. Three- March 5, 2026

(3) The Contractor's Proposal dated March 9, 2026 and the following negotiated modification to the Proposal, all of which documents are incorporated herein.
- (a) Negotiations Summary, dated June 17, 2026

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

CONTRACTOR:	PURCHASING AGENCY:
Signed by:	
By: matt coleman	By: Shanna Long
761662500FB24C9... (Signature)	(Signature)
matt coleman	Shanna Long
(Printed Name)	(Printed Name)
Title: CEO	Title: Lead Commodity Contract Officer

Rev. 5/12/21

JAMES MADISON UNIVERSITY

RFP # SLD-1247, Grant Proposal Development and Consulting Services
Negotiations Summary for Educational Policy Improvement Center dba Inflexion
June 17, 2026

1. Parties agree that items within this Negotiation Summary modify RFP# SLD-1247 and the Contractor's response to RFP# SLD-1247 and that this Negotiation Summary takes precedence in conflict.

2. Pricing Schedule:

   Retainer Model: The retainer model is used for ongoing strategic advising, grant development, research design consultation, and related support where a department or center requires flexible access to the expertise of the Inflexion team across multiple evolving initiatives. Under this model, services are billed using a blended professional services rate of $225 per hour.

   Fixed-Price Agreements: Fixed-price agreements are used for projects with clearly defined scopes of work, deliverables, and timelines. Under this model, Inflexion develops a project-specific budget based on the anticipated level of effort and staffing required to complete the work.

   Inflexion will develop a detailed project budget that includes the estimated level of effort by staff role and any anticipated project expenses (e.g., transcription, translation, software, participant incentives, or IRB-related costs, if applicable). The agreed fixed price includes those costs. If the work requires more time than estimated, Inflexion absorbs the additional cost as long as the work remains within the approved Scope of Work.

   Cost Reimbursement Agreements: Cost reimbursement agreements are used for projects where the general scope of work is known but the level of effort may evolve over time. Under this model, services are billed based on actual hours worked and approved project expenses.

   Inflexion will develop a detailed project budget that includes estimated staff time and anticipated project expenses. Actual hours and approved expenses will be invoiced as incurred in accordance with the approved Scope of Work. Additional approved work beyond the original Scope of Work would be invoiced based on actual costs incurred.

   Standard Project Billing Rates: Project-specific budgets developed under fixed price or cost reimbursement agreements will use the standard billing rate ranges identified below. The specific rate charged within each range will depend on the personnel assigned, their role and experience level, and the approved internal billing rate associated with that individual.

Role	Hourly Rate
Senior Researcher / Strategist	$175 - $300
Mid-Level Researcher / Strategist	$125 - $200
Project Management and Research Coordination Support	$85 - $125
Communications, Graphic Design, and Dissemination Support	$60 - $125
Additional Subject-Matter or Technical Specialists	Up to $300 depending on specialty and project requirements

3. Contractor has disclosed all potential fees. Additional charges will not be accepted.

4. Any projects or engagements shall be by mutually executed Scopes of Work (SOWs) pursuant to the terms and conditions and hourly rates/pricing as outlined in the above pricing schedule.

   The scope of work shall include number of hours to be worked, contracted hourly rates, deliverables to be provided, timelines, and total cost. The Purchasing Agency shall issue purchase orders in accordance with the project scope of work that shall authorize the offeror to proceed with work. There shall be no work permitted under any resulting contract without an agency issued purchase order.

5. Any scope of work agreed upon under the performance of this contract may be terminated by the university, in its sole discretion, for any reason or no reason at all, upon providing 30 days' written notice to the contractor. In the event of such termination, the terminating party shall not be liable to the other party for any damages, losses, or expenses whatsoever, including but not limited to consequential or incidental damages. Upon termination for convenience, the parties shall negotiate in good faith to determine a fair and reasonable compensation for work performed or expenses incurred up to the effective date of termination.

6. Payment Terms – As an agency of the Commonwealth of Virginia, James Madison University makes payment in accordance with the *Code of Virginia*, *§2.2-4347 through 2.2-4354*, Prompt Payment.

7. Billable hours are for actual work hours on authorized projects/tasks rounded to the half hour. Billable hours shall not include travel time.

8. Invoicing: invoicing shall be mutually agreed upon in advance by the parties and explicitly set forth in the scope of work for each individual project or engagement *(e.g. frequency, milestones, etc.)* and contractor will submit all invoices in accordance with the scope of work.

9. Travel Expenses: James Madison University is an agency of the Commonwealth of Virginia and as such, Contractors billing for travel related expenses must invoice in accordance with the U. S. General Services Administration (GSA) for lodging, meals and incidental expenses at the time of travel, which can be referenced at: http://www.jmu.edu/finprocedures/4000/4215mie.shtml .

   Transportation for air travel and car rental will be paid at cost with Contractor providing a documented receipt to the University. Contractor shall book air travel and car rental to ensure expenses remain economical. Air fare shall be reimbursed for coach/standard with no upgrades and car rental shall be reimbursed for standard with no upgrades.

10. All projects and engagements shall be provided on an as-needed basis. JMU makes no guarantee or commitment regarding the volume of work, number of projects, or amount of spend.

11. The purchasing agency shall own all right, title, and interest in and to all documentation, deliverables, work product, and intellectual property created or developed by the Contractor specifically for the agency under any resulting contract. The format and repository for delivery

shall be mutually agreed upon. Contractor retains all ownership of all pre-existing intellectual property, tools, software, methodologies, and materials it brings or uses in performing the work under the contract. Using existing Contractor frameworks, templates, or tools in work performed for the purchasing agency does not transfer ownership of those underlying materials.

12. No other terms and conditions on Contractor forms shall govern over any terms of this contract unless mutually accepted by a signature authority.

13. Contractor agrees that all exceptions taken within their initial response to RFP SLD-1247 that are not specifically addressed within this negotiation summary are null and void.

REQUEST FOR PROPOSAL
RFP# SLD-1247

Issue Date: **February 12, 2026**

Title: **Grant Proposal Development and Consulting Services**

Issuing Agency: **Commonwealth of Virginia**
James Madison University
Procurement Services MSC 5720
752 Ott Street, Wine Price Building
First Floor, Suite 1023
Harrisonburg, VA 22807

Period of Contract: From Date of Award Through One Year (Renewable)

Sealed Proposals Will Be Received Until 2:00 PM on March 11, 2026 for Furnishing The Services Described Herein. (See Special Terms & Conditions "D. Late Proposals")

SEALED PROPOSALS MAY BE MAILED, EXPRESS MAILED, SUBMITTED IN eVA, OR HAND DELIVERED DIRECTLY TO THE ISSUING AGENCY SHOWN ABOVE.

All Inquiries For Information And Clarification Should Be Directed To: Shanna Devers, Lead Commodity Contract Officer, Procurement Services, deverssl@jmu.edu; 540-568-3131; (Fax) 540-568-7935 not later than five business days before the proposal closing date.

NOTE: THE SIGNED PROPOSAL AND ALL ATTACHMENTS SHALL BE RETURNED.
In compliance with this Request for Proposal and to all the conditions imposed herein, the undersigned offers and agrees to furnish the goods/services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

Name and Address of Firm:

Educational Policy Improvement Center, dba Inflexion

PO Box 5465

Eugene, OR 97405

By: _____ *(Signature)*

Name: Matt Coleman *(Please Print)*

Date: 03/09/2026

Title: CEO

Web Address: https://inflexion.org/

Phone: 541-246-2600

Email: contracts@inflexion.org

Fax #: 541-246-2608

ACKNOWLEDGE RECEIPT OF ADDENDUM: #1 MC #2 MC #3 MC #4 _____ #5 _____ (please initial)

SMALL, WOMAN OR MINORITY OWNED BUSINESS:
☐ YES; ☒ NO; *IF YES* ⇒⇒ ☐ SMALL; ☐ WOMAN; ☐ MINORITY ***IF MINORITY***: ☐ AA; ☐ HA; ☐ AsA; ☐ NW; ☐ Micro

Note: This public body does not discriminate against faith-based organizations in accordance with the *Code of Virginia*, § 2.2-4343.1 or against an offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.

innovative solutions for equitable education

James Madison University: JMU Center for Advancement Research in Education (JMU CARE™)

Request for Proposal (RFP) # SLD-1247 Grant Proposal Development and Consulting Services

Educational Policy Improvement Center dba Inflexion
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Eugene, OR 97405

1-541-246-2600 (ph)
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jessica.jacovidis@inflexion.org
Jessica Jacovidis, PhD
Principal Researcher

March 11, 2026

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RFP# SLD-1247 Grant Proposal Development and Consulting Services

Inflexion is pleased to submit this proposal to James Madison University (JMU) in response to RFP# SLD-1247 for Grant Proposal Development and Consulting Services to support the Center for Advancement in Education Research (JMU CARE™). The following sections introduce Inflexion as an organization, summarize relevant experience and qualifications, and describe the team and resources that position us to support JMU CARE in achieving its research and funding goals.

Statement of Needs

The following proposal is organized in accordance with the requirements outlined in Section IV.B of the Request for Proposals. The RFP requests that respondents address each requirement individually and reference the corresponding paragraph numbers. To ensure clarity and facilitate the evaluation process, Inflexion has organized this proposal to correspond directly with those requirements. Each response provides detailed information about Inflexion's organizational capacity, relevant experience, proposed team structure, and approach to supporting JMU CARE in grant development, research design, evaluation, and strategic partnership activities.

IV.B.1. Organizational Capacity

Describe your firm's capacity to deliver the service areas as indicated above. Include team size, core roles, and availability during peak periods.

Inflexion partners with education leaders and organizations to design initiatives, strengthen implementation, and generate research and insights that support meaningful improvement in educational systems. Founded in 2002 as the Educational Policy Improvement Center (EPIC), the organization has grown through more than two decades of partnerships with schools, universities, and national education initiatives. Today, Inflexion draws on expertise in leadership development, education technology, and research and evaluation to support partners addressing complex challenges in education.

The organization currently includes approximately 23 full-time staff members working across three primary teams. **Portico** focuses on school coaching, **EduTech** supports education technology initiatives, and **Edulytix** leads research and evaluation work. These teams are supported by an **operations** team that manages the organization's administrative and financial functions.

The **Edulytix** team leads Inflexion's research, evaluation, and strategic advisory work and will be primarily responsible for the services proposed in this RFP. Edulytix works with

universities, education agencies, and national education organizations to design research studies, develop evaluation frameworks, support grant proposal development, and conduct mixed methods analyses that inform program improvement and policy decisions. Core roles within the Edulytix team include developing evaluation plans for grant proposals, designing data collection instruments, advising partners on research methodology, conducting quantitative and qualitative analyses, and supporting analysis and dissemination once projects are underway.

In addition to its internal staff, Inflexion maintains a network of experienced consultants who contribute specialized expertise in areas such as research methods, higher education systems, evaluation design, and data analysis. Several members of this network have prior experience working with James Madison University, including roles within the university's assessment and research infrastructure. These consultants can be engaged as needed to expand analytic capacity during peak periods such as major grant proposal deadlines, large-scale data collection efforts, or complex analytic projects, while project leadership and coordination remain with Inflexion's core team.

This structure allows Inflexion to maintain a stable internal team while scaling support during periods of increased demand, ensuring both continuity of project leadership and the collaborative working relationships that characterize its partnerships with clients.

IV.B.2. Higher Education Experience

Describe any prior work with other higher education institutions, highlighting strategic planning, technical assistance, or evaluation engagements.

Although Inflexion's organizational portfolio primarily focuses on K–12 education systems and national education initiatives, much of the organization's research and evaluation work occurs in collaboration with university researchers and interdisciplinary research teams. In many of these initiatives, universities participate as research partners in projects led by national education organizations. Through this work, Inflexion regularly collaborates with faculty researchers and university-based research teams as studies are designed, implemented, and analyzed across multiple institutions. For example, Inflexion's research and evaluation work with organizations such as the International Baccalaureate, AVID, and the College Board has involved collaboration with faculty researchers and university-based research teams across multiple institutions (described in more detail in Section IV.B.3.). Through these engagements, the organization has experience working within university research environments and coordinating research design, evaluation planning, and data collection activities that involve higher education partners.

Most directly relevant to this proposal, Inflexion has served over the past year as a strategic research and grants advisor to JMU CARE. In this role the team has worked closely with Center leadership and affiliated faculty to help shape research proposals, refine research questions and study designs, advise on evaluation and analytic approaches, and navigate institutional processes associated with developing externally funded research. This collaboration has included supporting interdisciplinary proposal development and coordinating research planning across multiple faculty teams.

Members of the proposed project team bring extensive experience working within university assessment and research environments, including at James Madison University. Several members of the team completed graduate training in JMU's Assessment and Measurement PhD program and subsequently held roles within the university's Center for Assessment and Research Studies (CARS) and other institutional units supporting program assessment and student learning initiatives. Through these roles, team members worked directly with academic departments and university programs to develop assessment plans, analyze program data, and support evidence-based program improvement. This shared experience provides the team with a strong understanding of the institutional structures, research expectations, and internal processes that shape research and assessment work at JMU and within higher education more broadly. Additional details regarding the training and expertise of individual team members is provided in Section IV.B.4.

IV.B.3. Experience Forming and Sustaining Cross-Institutional Partnerships

Summarize your firm's experience forming and sustaining cross-institutional or international partnerships.

Much of Inflexion's research and evaluation work occurs in collaborative environments that involve multiple organizations working together to pursue shared research and program goals. These initiatives frequently bring together universities, school systems, nonprofit organizations, and national education organizations, requiring coordination across institutions with different missions, timelines, and operational structures. In these settings, Inflexion often works with project partners to structure collaborative research efforts, clarify responsibilities across participating institutions, and support the development of grant proposals and research initiatives that reflect the expertise of multiple organizations.

Several of Inflexion's major research and evaluation projects have involved cross-institutional partnerships among national organizations, universities, and school systems. For example, Inflexion has conducted research and evaluation studies for organizations such as the International Baccalaureate, AVID, and the College Board. These initiatives involve collaboration with networks of schools as well as university researchers and

research teams working across multiple institutions. In these projects, Inflexion contributes to the design and coordination of collaborative studies, supports shared approaches to data collection and analysis across participating sites, and helps ensure that research activities conducted across different organizations remain aligned with common project goals.

Inflexion's work with the International Baccalaureate also provides experience supporting partnerships that extend across national boundaries. IB research initiatives often involve global networks of schools and educators operating in multiple countries and educational systems. Through these collaborations, Inflexion staff have worked with researchers, educators, and organizational partners across international contexts to design studies, coordinate data collection across diverse sites, and interpret findings that reflect multiple educational environments. These projects require coordination among partners working in different policy contexts and institutional settings, as well as careful alignment of research methods and timelines so that data collected across countries can be meaningfully compared and interpreted.

Inflexion's recent work with JMU CARE provides a current example of partnership development within a university research environment. Over the past year, Inflexion has worked with Center leadership and affiliated faculty to support the development of interdisciplinary research proposals that bring together collaborators from multiple departments as well as external research and community partners. This work has included helping identify potential collaborators with complementary expertise, facilitating early conversations among faculty and partner organizations to clarify research goals and roles, and assisting teams in structuring proposals that reflect the contributions of each participating institution. Through this work, Inflexion has helped faculty teams think strategically about how to build research partnerships that strengthen grant proposals and support the long-term development of collaborative research initiatives.

Across these initiatives, Inflexion's role often includes helping partners clarify responsibilities, align timelines and expectations across institutions, and establish communication processes that allow collaborative research projects to function effectively over time. This experience supporting partnerships among universities, national organizations, and community partners positions Inflexion to assist JMU CARE in forming and sustaining collaborative research initiatives that involve multiple institutions and stakeholders.

IV.B.4. Harrisonburg-Based Senior Researcher

Demonstrate your ability to provide a senior researcher based or regularly available in the Harrisonburg, VA area to support on-site data collection.

Inflexion's senior research leadership for this project is based in Harrisonburg, Virginia. The senior research lead lives and works in the Harrisonburg area and is available to work directly with JMU CARE leadership and faculty collaborators on campus as research initiatives and grant proposals are developed.

This proximity allows Inflexion to participate in regular working sessions with the Executive Director of JMU CARE focused on research planning, grant proposal development, and study design. These sessions often involve collaborative work such as refining research questions, developing proposal narratives, designing data collection instruments, and preparing materials for meetings with faculty collaborators and potential funders.

Because the research lead is located in Harrisonburg, Inflexion can also support local research activities when needed. This includes facilitating interviews or focus groups, coordinating site visits, and supporting other forms of on-site data collection associated with research and evaluation projects.

The research lead has also spent more than a decade building professional relationships across the Harrisonburg community through nonprofit leadership and community engagement. These connections allow Inflexion to help JMU CARE identify and engage community partners who can contribute to research initiatives and grant-funded projects. For example, when the Center explored opportunities to develop financial literacy programming for the local community, the research lead helped connect JMU CARE with local financial professionals who contributed expertise and sponsorship support.

IV.B.5. Grant Opportunity Identification and Strategic Alignment

Explain your approach to opportunity scanning, fit assessment, timeline back-planning, and integration with JMU CARE/COE priorities.

Inflexion approaches grant development as part of a long-term research strategy and portfolio-building activity rather than a series of independent proposal submissions. Successful research centers build funding portfolios by pursuing projects that reinforce a coherent research agenda over time. For this reason, opportunity identification is always considered in relation to the center's research priorities, emerging collaborations, and long-term programmatic goals.

Opportunity Scanning. The Inflexion team maintains an ongoing awareness of the external funding landscape through regular review of federal agency programs, state initiatives, foundation programs, and emerging interdisciplinary funding opportunities. This includes monitoring funding announcements from agencies that fund education research such as the US Department of Education, National Science Foundation (NSF), and the National Institute of Health (NIH), as well as tracking initiatives emerging through state education agencies and regional partnerships, and professional networks connected to education research and policy. The team also monitors agency priorities, new program initiatives, and recently funded projects to understand how funding priorities are evolving. Maintaining this broader perspective allows the team not only to identify current opportunities but also to anticipate where funding priorities are moving, ensuring emerging project ideas align with upcoming funding cycles and program priorities.

Fit Assessment. When potential opportunities are identified, the Inflexion team reviews whether the opportunity represents a strong strategic fit. This review considers alignment with the research agenda, alignment with sponsor priorities and review criteria, the feasibility of assembling the appropriate interdisciplinary team, and the capacity to carry out the proposed work. These discussions typically occur during working sessions where project ideas, potential collaborations, and emerging funding opportunities are explored. In some cases, the conversation leads directly to a decision to pursue proposal development. In other cases, the team determines that a project concept should be refined further before pursuing external funding or that the opportunity does not align closely enough with the research agenda to justify proposal development. This process helps research teams focus their effort on opportunities that advance their longer-term research direction rather than pursuing projects that may be fundable but fall outside the core research trajectory.

Inflexion uses this same approach across its work with partner organizations. Strategic conversations about emerging opportunities frequently lead to the identification of interdisciplinary funding possibilities and the formation of research teams positioned to pursue them. The team also shares relevant opportunities when they are likely to be of interest to partners, even when Inflexion is not directly involved in the proposal.

Timeline Back-Planning. Once a strong opportunity has been identified, the team develops a proposal timeline that begins with the submission deadline and works backward to identify key milestones. This process establishes a clear sequence of activities such as concept development, identification and coordination of collaborators, preparation of narrative sections, development of evaluation and data collection plans, and internal proposal review.

Back-planning also allows the team to account for institutional processes associated with proposal submission, including internal review and submission timelines. Establishing these milestones early helps ensure that proposal development progresses in a structured way and that the full proposal can be reviewed and refined before submission.

Integration with JMU CARE and COE Priorities. Because Inflexion works closely with research leadership on an ongoing basis, opportunity identification and proposal planning occur within broader strategic conversations about the Center's research direction. This allows proposal development efforts to reinforce JMU CARE's priorities while ensuring that the Center remains positioned to respond quickly when strong funding opportunities emerge.

IV.B.6. Narrative Development, Budgeting, and Submission Support

Describe your processes for narrative drafting, budget creation, compliance crosswalks, and submission support.

Once a funding opportunity has been identified and a project idea begins to take shape, Inflexion works with project leaders to develop the proposal and coordinate the work required to prepare it for submission.

Narrative Drafting. Narrative development typically begins during working sessions with project leaders where the core idea for the proposal is discussed and refined. These conversations focus on clarifying the central research questions, the approach the project will take to investigate them, and the activities required to carry out the work. In many cases the team also works with investigators to sketch conceptual models or logic frameworks that help clarify how the project's components fit together before drafting begins.

As proposal sections begin to develop, investigators and collaborators contribute written content based on their areas of expertise. The team then works across those contributions to organize sections, refine language, and coordinate revisions so that the proposal reads as a coherent research plan rather than a set of independently written pieces. This process typically unfolds through a series of working sessions and iterative revisions as the proposal develops.

Budget Development. Budget planning occurs alongside narrative development. Inflexion works with project leaders to ensure that the activities described in the proposal are supported by an appropriate budget structure. For university-led proposals, the formal budget is developed through institutional offices such as JMU's Office of Sponsored Programs using university templates and procedures. Inflexion's role is to advise on the

alignment between the proposed scope of work and the resources required to carry out the project.

Compliance Crosswalk. Throughout proposal development, the team works directly from the funding announcement and its review criteria to ensure that required components are addressed and that the proposal responds clearly to the sponsor's priorities. As sections are drafted and revised, the team reviews the narrative against the solicitation to confirm that required elements are included and that the proposal aligns with the sponsor's expectations. This process helps ensure that proposals are both complete and responsive to the criteria used during review.

Submission Support. As submission deadlines approach, proposal development typically shifts into focused working sessions where narrative sections are revised, proposal components are aligned, and required materials are finalized. While the university usually manages the formal submission process, Inflexion works with project leaders to ensure that the proposal package is internally consistent, complete, and ready for institutional submission. During the final stages of submission, the team also remains available to review materials as they are uploaded, helping confirm that required documents are included and that the final submission reflects the approved version of the proposal.

IV.B.7. Strategic Facilitation and Decision Making

Detail facilitation techniques for strategy sprints, decision framing, and issue analysis; how will your firm balance constructive critique with capacity building?

Research teams frequently face strategic decisions related to proposal opportunities, research design, and partnership development. These conversations often occur under tight timelines. Inflexion supports partners during these moments by facilitating focused working sessions that help teams clarify options, evaluate tradeoffs, and determine next steps.

Many of these conversations occur during collaborative working sessions in which investigators and partners work through a specific challenge together. These sessions may focus on refining a proposal concept, evaluating whether to pursue a funding opportunity, or addressing questions about research design or partnership roles. These discussions often occur as proposal ideas are taking shape, allowing teams to test assumptions and refine project concepts before they are formalized in the proposal narrative. The goal is to help the team move from broad discussion toward clear decisions about how to proceed.

A key part of this facilitation involves helping teams clarify the decision they are trying to make and identifying the factors that should inform that decision. These may include

sponsor priorities, methodological considerations, partnership feasibility, or implementation constraints. By making these factors explicit, the team can evaluate options more effectively and focus discussion on the issues that matter most for the proposal.

Constructive critique is an important part of this process. Inflexion's role is not simply to support existing ideas but to help partners strengthen those ideas through thoughtful questioning and practical experience with research design and grant development. For example, during preparation for one proposal, the team discussed whether a federal program officer might assist with project recruitment. Inflexion advised against including this expectation in the proposal, noting that program officers typically do not participate directly in recruitment activities and that suggesting otherwise could signal unfamiliarity with agency practices. Conversations like this help partners avoid common pitfalls while strengthening the credibility of the proposal.

At the same time, these discussions are structured to support capacity building. Rather than simply recommending a course of action, the Inflexion team explains the reasoning behind methodological and strategic considerations so that partners strengthen their own ability to evaluate opportunities, design research initiatives, and make informed decisions in future projects.

IV.B.8. Strengthening Research Capacity and Knowledge Systems

Outline your approach to strengthening research methods, project management, and knowledge systems. Provide sample curricula and materials.

Inflexion strengthens research capacity by helping organizations develop the structures and practices that support sustained research activity. Research centers often operate in environments where new initiatives are constantly emerging, collaborators change across projects, and proposal timelines require teams to move quickly from concept to submission. In these settings, success depends not only on strong individual projects but also on the systems that allow research teams to consistently design rigorous studies, coordinate complex work, and build upon previous efforts. Inflexion works with partners to strengthen these underlying systems so that research initiatives become easier to design, manage, and refine over time.

Strengthening Research Methods. Inflexion strengthens research methods by working directly with project leaders during the development of research proposals and studies. As teams refine research questions and develop conceptual frameworks, Inflexion helps ensure that the methodological approach aligns with the goals of the project and the

evidence required to support decision-making. This may involve helping investigators clarify the relationship between research questions and analytic strategies, identifying potential threats to validity, or ensuring that proposed methods are feasible given available data and implementation conditions. Because these conversations occur within the context of real projects, partners strengthen their ability to frame research questions, evaluate methodological options, and interpret analytic results as part of their normal research workflow.

Strengthening Project Management. Research initiatives frequently involve multiple investigators, external collaborators, and overlapping timelines associated with proposal development, data collection, and reporting. Inflexion helps partners organize this work by supporting planning processes that clarify project roles, coordinate activities across participating teams, and align research tasks with key milestones. This may include structuring proposal development timelines, coordinating responsibilities among collaborating researchers, and ensuring that research activities remain aligned with the broader goals of the project. By helping teams develop clearer workflows and planning structures, Inflexion reduces administrative complexity and allows investigators to focus more directly on the intellectual work of the research.

Strengthening Knowledge Systems. Sustained research activity also depends on an organization's ability to retain and build upon the intellectual assets developed through previous work. Over time, research teams generate a wide range of materials that support proposal development and research implementation, including conceptual frameworks, proposal language, research instruments, analytic documentation, and reporting structures. Inflexion works with partners to organize and refine these materials so they can be reused and improved across projects rather than recreated each time a new initiative begins.

These knowledge systems allow research efforts to become cumulative. Conceptual frameworks evolve as new projects build on earlier work, research instruments are refined through repeated use, and analytic approaches become more sophisticated as teams gain experience working with similar datasets and research questions. By helping partners organize and maintain these resources, Inflexion supports a research environment in which each project contributes to the development of stronger methods, clearer workflows, and more effective research practices.

Through this approach, capacity building occurs as a natural result of the work itself. As research teams design studies, manage complex initiatives, and interpret findings, they strengthen the systems and practices that support ongoing research activity. This allows organizations such as JMU CARE to expand their research portfolio while steadily

increasing their ability to design rigorous studies and manage large-scale research initiatives.

IV.B.9. Research Design and Evaluation Methods

Describe your methods for research design, logic models, instrument development, sampling, IRB readiness, data collection & analysis, and utilization-focused reporting.

Inflexion approaches research design as a collaborative process grounded in pragmatic mixed-methods research and utilization-focused evaluation. Rather than beginning with predetermined methodological preferences, the research design process starts by clarifying the decisions the research must ultimately inform. From there, the team works with partners to develop research questions, conceptual frameworks, and data collection strategies capable of generating evidence that informs those decisions ensuring that proposed methods are both methodologically sound and feasible within the context in which the project will operate. A broader overview of the research and evaluation services provided by Inflexion is included in Appendix A.

Research Framing and Logic Model Development. The research design process typically begins with clarifying the conceptual foundations of the project. Inflexion frequently works with project teams to develop logic models that articulate how proposed activities are expected to produce meaningful outcomes. Logic models are often treated as simple diagrams used to satisfy proposal requirements. Inflexion uses them differently: as analytical tools that connect program design, research questions, and evaluation strategies. Logic model development typically occurs through collaborative working sessions in which project partners identify:

- the problem the project is intended to address
- the proposed activities or interventions
- the mechanisms through which those activities influence outcomes
- short-, intermediate-, and long-term outcomes
- assumptions and contextual factors that may influence implementation

These discussions often surface implicit assumptions about how programs are expected to function. Making those assumptions explicit allows the team to refine both the program design and the research strategy used to evaluate it.

Instrument Development. Once research questions and conceptual frameworks have been established, the team develops instruments capable of generating the data required to address those questions. Instrument development may include survey design, interview

protocols, focus group guides, observational frameworks, and administrative data collection procedures.

Instrument development begins by translating the constructs identified in the research framework or logic model into measurable indicators. The team works with project partners to determine what information must be collected, from whom, and at what points in time to test the proposed relationships within the study. Draft items and protocols are then developed to capture these constructs while remaining appropriate for the populations participating in the research.

Instruments are typically refined through collaborative review processes involving project partners and subject-matter experts to ensure alignment between the research questions, the conceptual framework, and the proposed analytic strategies. When appropriate, instruments may also be piloted or reviewed with small groups of representative participants to confirm that questions are interpreted as intended and that response options adequately capture the range of participant experiences. These steps help ensure that instruments generate valid and interpretable data before broader data collection begins.

Sampling and Data Collection Design. Sampling strategies are selected based on the research questions being addressed, the structure of the population being studied, and the practical context in which the research will occur. Many studies require balancing methodological rigor with practical considerations such as participant availability, program schedules, and implementation timelines. Sampling approaches may include purposive sampling for qualitative inquiry, stratified sampling to ensure representation across key participant groups, census approaches when working with smaller populations, or longitudinal sampling strategies when examining change over time. In some studies, sampling strategies are designed to support comparisons across sites, participant groups, or implementation contexts.

Data collection plans are developed collaboratively with project partners to ensure that research activities align with program operations and minimize disruption to participants. These plans often include scheduling data collection within existing program structures, coordinating with local site leaders, and establishing clear procedures for participant recruitment and communication. Careful planning at this stage helps maintain data quality while supporting high participation rates across participating sites.

IRB Preparation and Research Compliance. Inflexion regularly supports partners in preparing materials for Institutional Review Board (IRB) review when projects involve human subjects. This support may include assisting with the preparation of protocol

materials, drafting consent and assent forms, documenting data security procedures, and ensuring that research instruments align with ethical research standards. Because IRB processes can influence project timelines and data collection procedures, these preparations are typically initiated early in the research planning process. The team works with partners to ensure that research protocols clearly describe participant recruitment procedures, data collection activities, and plans for protecting participant confidentiality. When projects involve multiple collaborating institutions, the team also helps coordinate documentation so that IRB submissions remain consistent across participating organizations.

Data Analysis. Data analysis strategies are selected based on the research questions and the structure of the data collected. Because many projects supported by Inflexion involve complex educational systems and multi-site initiatives, mixed-methods approaches are frequently used to examine both outcomes and implementation processes. Quantitative analyses may include descriptive statistics, inferential analysis, regression modeling, or longitudinal analyses designed to examine change over time. These analyses often involve integrating administrative datasets with survey responses to better understand patterns of participation, outcomes, and program implementation. When appropriate, analyses also examine variation across participant groups to better understand how program experiences and outcomes may differ across contexts or populations. Qualitative analysis typically involves structured coding processes that allow researchers to identify themes and patterns within interview, focus group, or observational data. Coding frameworks are developed iteratively, often combining deductive categories derived from the research framework with inductive themes that emerge during analysis.

Many studies involve integrating multiple sources of evidence, including administrative datasets, survey responses, and qualitative data collected through interviews or focus groups. Triangulating these sources allows the research team to examine relationships among program design, participant experiences, and observed outcomes while providing a more comprehensive understanding of how initiatives operate in practice.

Utilization-Focused Reporting. Inflexion's reporting approach is grounded in the principles of utilization-focused evaluation. The goal of research is not simply to generate findings but to ensure that those findings inform meaningful action. Reporting processes often include collaborative interpretation sessions in which research teams review findings together and discuss how results relate to program implementation. Reporting products are tailored to the needs of different audiences and may include technical research reports, executive summaries, visual dashboards, presentations, or policy briefs. Aligning

reporting formats with audience needs helps ensure that research findings remain accessible and actionable.

IV.B.10. Accessibility and Inclusive Design

Explain how your firm ensures accessibility and inclusive design across reports, tools, trainings, and web-based materials integral to project deliverables.

Inflexion incorporates accessibility and inclusive design considerations throughout the research and evaluation process. These considerations influence how research instruments are developed, how data are collected, and how findings are communicated to diverse audiences. The goal is not only to meet accessibility expectations but to ensure that research processes allow participants to fully represent their experiences and that research findings can be clearly understood and used by those who need them. Appendix B provides additional information on our approaches to data.

Accessible and Inclusive Research Instruments. Accessibility begins during instrument development. Surveys, interview protocols, and focus group guides are designed so that participants with varying levels of familiarity with research terminology can understand and respond to questions accurately. Draft instruments are reviewed to ensure that language is clear, concise, and culturally appropriate. When possible, instruments are tested with representative participants to confirm that questions are interpreted as intended.

Inflexion also considers accessibility when determining how data will be collected. Data collection strategies are designed to accommodate the contexts in which participants live and work. For example, surveys may be offered in multiple formats, interview protocols may be adapted to different participant groups, and research teams may work with local partners to ensure that recruitment and communication approaches are appropriate for the populations involved in the study. These practices help ensure that participants can engage meaningfully with the research process and that the resulting data accurately reflect their perspectives.

Accessible Communication of Research Findings. Accessibility is equally important when communicating research findings. Research results only influence practice when audiences can clearly interpret the evidence being presented. Inflexion therefore structures reports and other research products to support both clarity and transparency. Reports are typically organized with clear headings, executive summaries, and structured sections that allow readers to navigate the document easily. Visual elements such as charts, tables, and graphical displays are used to illustrate patterns in the data and help readers interpret findings more efficiently. Technical details related to research design and

analysis are documented clearly, while explanations of findings are written in language that remains accessible to readers who may not have specialized methodological training.

Audience-Specific Dissemination. Research findings often need to be shared with multiple audiences who have different informational needs. Academic researchers may require detailed methodological documentation, while practitioners, administrators, and community stakeholders often need concise explanations of findings and implications. Inflexion therefore works with project partners to develop reporting strategies that match the needs of these different audiences. This approach may involve producing multiple formats of research outputs, such as technical research reports, executive summaries, visual data presentations, and facilitated discussions in which project teams review findings together and consider how the results should inform program improvement or policy decisions. By tailoring reporting formats to the needs of different audiences, Inflexion helps ensure that research findings remain accessible, meaningful, and actionable.

Accessible Digital Materials. When research deliverables include digital or web-based materials, Inflexion follows established accessibility standards to ensure that these resources can be used by individuals with varying abilities. This includes attention to screen-reader compatibility, color contrast, and document formatting that supports assistive technologies. These practices help ensure that digital materials remain usable by a broad range of participants and stakeholders.

Across all stages of the research process, accessibility and inclusive design are treated as integral components of high-quality research practice. By ensuring that research instruments are understandable, data collection processes are inclusive, and findings are communicated clearly, Inflexion helps partners produce research that is both methodologically rigorous and broadly accessible to the communities it is intended to serve.

IV.B.11. Workload Estimation and Project Assumptions

Describe how your firm estimates hours for discrete tasks and multi-stream projects, the inputs required from JMU, and your assumptions.

Inflexion develops workload estimates through structured project scoping conversations that clarify the scope of work, expected deliverables, level of collaboration required, and the complexity of the research or proposal development activities involved. Because the services described in this RFP include grant development, research design, evaluation, and

strategic advising, the level of effort required for specific tasks can vary considerably across projects.

Rather than relying on fixed templates, estimates are developed by identifying the specific tasks required to complete the work and estimating the level of effort associated with each component. This approach allows estimates to reflect the complexity of the work while remaining flexible enough to respond to evolving project needs and compressed grant timelines.

Estimating Hours for Discrete Tasks. Discrete tasks are defined as bounded activities with clearly identifiable deliverables. Examples include development of research instruments, preparation of proposal sections, construction of logic models, preparation of IRB documentation, or facilitation of strategy sessions. When estimating hours for discrete tasks, the team typically considers several factors:

- **Scope of the task**, including the complexity of the work and the number of collaborators involved
- **Background preparation**, such as reviewing existing documents, prior proposals, or program materials
- **Expected level of iteration**, including the number of review and revision cycles anticipated
- **Integration with other project components**, particularly when tasks depend on earlier conceptual or design work
- **Timeline constraints**, especially for grant proposals that require concentrated effort close to submission deadlines

These factors are used to estimate the level of effort required to complete the task while maintaining the quality expected for competitive research proposals and rigorous evaluation work.

Estimating Work for Multi-Stream Projects. More complex projects often involve multiple work streams occurring simultaneously. For example, grant development efforts may involve concept development, narrative drafting, partner coordination, and compliance review occurring in parallel. Similarly, evaluation projects may include instrument development, data collection, analysis, and reporting activities that unfold across multiple phases. For these projects, Inflexion estimates hours by mapping the work across the major functional components of the project. These components may include research design, narrative development, instrument development, data collection planning, analysis, reporting, and project coordination. Once the primary work streams are identified, the team estimates the level of effort required for each component and

considers how those activities interact over the course of the project. Recognizing these interdependencies helps ensure that workload estimates accurately reflect the overall complexity of the project.

Inputs Required from JMU. Effective collaboration assumes several forms of input from JMU CARE and the College of Education. First, project leaders provide the intellectual direction and subject-matter expertise for the proposed research or program initiative. While Inflexion contributes methodological expertise and proposal development support, the conceptual leadership of the project remains with the research team. Second, partners typically provide access to relevant institutional information needed to support the work. This may include prior proposals, program documentation, or administrative data that informs research design or evaluation planning. Third, regular communication between the Inflexion team and project partners is assumed. These interactions typically occur through planning meetings, proposal working sessions, and targeted consultations focused on specific technical questions. Finally, when projects involve formal institutional processes such as grant submission or IRB review, JMU coordinates with the appropriate institutional offices to ensure that required materials are submitted through established procedures.

Key Assumptions. Several assumptions guide Inflexion's workload estimates. First, the collaboration model assumes an integrated partnership approach in which Inflexion works closely with JMU CARE leadership to support proposal development, research design, and evaluation activities as they arise. Second, estimates assume iterative collaboration, particularly during proposal development and research design phases where ideas are refined through multiple rounds of discussion and revision. Third, estimates assume that the level of effort required for specific activities will vary depending on the complexity of the opportunity or project being pursued. For this reason, workload estimates are typically refined during initial scoping discussions to ensure that expectations remain aligned with project goals.

Through this structured but flexible approach to workload estimation, Inflexion ensures that project planning remains transparent, realistic, and responsive to the needs of JMU CARE and the College of Education.

IV.B.12. Schedule Development, Milestone Tracking, and Risk Management

Provide your approach to schedule development, milestone tracking, and risk management.

Inflexion manages projects through a structured but flexible planning process designed to support the complex and often time-sensitive work associated with grant development,

research design, and evaluation. Because many of these activities involve multiple collaborators and overlapping workstreams, project management focuses on maintaining clear schedules, tracking key milestones, and identifying risks early so that projects remain coordinated and responsive to emerging needs.

Schedule Development. Project schedules are developed collaboratively with JMU CARE leadership at the outset of major initiatives and are refined as work progresses. The process typically begins by identifying external constraints that influence the timeline for the work. For grant development activities, these constraints often include sponsor submission deadlines, institutional review timelines, and collaborator availability. For research and evaluation projects, schedules are shaped by program implementation timelines, data collection windows, and reporting requirements. Once these constraints are identified, the team develops a back-planned schedule that begins with the final deliverable and works backward to identify the sequence of activities required to complete the work successfully. This approach helps ensure that sufficient time is allocated for concept development, collaboration, drafting, and revision before key deadlines. Schedules are revisited regularly as projects evolve. Because proposal development and research planning often involve iterative refinement, the schedule functions as a working framework rather than a rigid sequence of tasks.

Milestone Tracking. Milestones are used to track progress and coordinate work across collaborators. Milestones are typically defined as key deliverables or decision points that signal meaningful progress toward project completion. Examples of milestones may include completion of a proposal concept outline, finalization of a research design, development of data collection instruments, submission of IRB documentation, or delivery of interim or final reports. Milestones provide shared visibility into project progress and help ensure that collaborators understand how their contributions fit within the overall workflow. Regular planning meetings are used to review milestone progress, confirm upcoming tasks, and adjust schedules when necessary. Because many projects involve multiple contributors working on different components of the project simultaneously, milestone tracking plays an important role in maintaining coordination across these parallel workstreams.

Risk Identification and Mitigation. Research and grant development projects often involve uncertainties that can affect timelines or project scope. Inflexion addresses risk management through proactive planning and ongoing communication with project partners. Common risks include compressed proposal timelines, coordination challenges across multi-institution collaborations, evolving sponsor guidance, and delays associated with institutional review processes. To mitigate these risks, the team emphasizes early

identification of key dependencies during project planning. Critical activities such as concept development, partnership coordination, and research design planning are initiated as early as possible to reduce time pressure later in the process. During project implementation, regular coordination meetings allow the team to identify emerging issues and adjust project plans when necessary. This collaborative approach allows risks to be addressed quickly while maintaining progress toward project milestones.

Through structured scheduling, milestone tracking, and proactive risk management, Inflexion ensures that complex projects remain organized, responsive, and aligned with project timelines.

IV.B.13. Communication Cadence, Documentation, and Collaboration Tools

Detail the cadence and format of status meetings, progress summaries, and documentation; your collaboration tools and responsiveness standards.

Clear communication and shared visibility into project progress are essential for managing the types of activities described in this RFP, which often include overlapping work related to opportunity scanning, proposal development, research design, evaluation planning, and strategic advising. Inflexion maintains a structured communication cadence that combines regularly scheduled status meetings with flexible working sessions and clear documentation of project activities.

Status Meeting Cadence. Regular status meetings serve as the primary mechanism for coordinating work with JMU CARE leadership and collaborating faculty. These meetings typically occur on a recurring schedule (most often weekly or biweekly depending on the intensity of current projects) and focus on reviewing active initiatives, upcoming deadlines, and emerging opportunities. During these meetings the team typically reviews progress on proposal development efforts, discusses potential funding opportunities, and identifies decisions required to maintain project momentum. When multiple initiatives are underway simultaneously, these meetings also provide an opportunity to coordinate priorities and ensure that timelines remain aligned across projects. Because research and grant development activities often evolve quickly, standing meetings are supplemented by additional working sessions scheduled as needed to address specific tasks or time-sensitive decisions.

Working Sessions and Collaborative Drafting. In addition to status meetings, Inflexion frequently participates in focused working sessions with project leaders and collaborators. These sessions are typically used for activities that benefit from real-time collaboration, such as refining proposal narratives, reviewing research designs, developing instruments,

or preparing materials for grant submission. Working sessions allow the team to move efficiently from conceptual discussion to concrete deliverables. During the final stages of proposal preparation, for example, the team often conducts collaborative drafting or editing sessions to integrate narrative sections, refine methodological descriptions, and finalize proposal components prior to submission deadlines. Because proposal timelines can become compressed, these working sessions provide flexibility for more intensive collaboration during critical phases of the work.

Progress Summaries and Documentation. To maintain transparency and shared understanding of project progress, Inflexion documents key discussions, decisions, and next steps throughout the course of the work. Documentation typically includes summaries of recent activities, identification of upcoming deadlines and deliverables, notes from planning discussions, and tracking of proposal or research components under development. These summaries help ensure that collaborators remain aligned even when multiple workstreams are advancing simultaneously. For research and evaluation projects, documentation may also include technical materials such as research protocols, data collection instruments, analytic plans, and reporting outlines. Maintaining organized documentation allows project teams to build on prior work and ensures continuity across phases of the project.

Collaboration Tools. Inflexion uses collaborative tools that support real-time document development, communication, and information sharing across project teams. The specific tools used depend on the preferences and systems already in place within the partner organization. Common tools include shared document platforms for drafting and revision, videoconferencing tools for planning meetings and working sessions, and shared folders for organizing project documentation and research materials. These tools allow multiple collaborators to contribute to proposal development and research planning simultaneously while maintaining version control and transparency.

Responsiveness and Communication Practices. Inflexion's collaboration model emphasizes responsiveness and accessibility. In addition to scheduled meetings, the team remains available to respond to questions, review emerging ideas, and provide feedback on draft materials as needed. Communication often occurs through a combination of scheduled meetings, brief consultations, and real-time collaboration during periods of intensive proposal development. This approach allows the team to function as an embedded partner in the work while maintaining the flexibility required to respond to time-sensitive opportunities.

IV.B.14. Key Personnel and Roles

Identify key personnel (e.g., Principal/Lead Strategist, Senior Researcher—Harrisonburg/on-site, Grants Specialist, Methodologist, Project Manager, Data Analyst, Communications Lead). Provide resumes and percent allocation.

The Inflexion team supporting JMU CARE includes senior research leadership, project management support, and access to additional methodological and analytic expertise as needed. This structure allows the team to provide strategic advising, proposal development support, and research design consultation while maintaining consistent coordination across projects.

The core team remains consistent across engagements, with additional team members contributing specialized expertise depending on the technical requirements of specific proposals or research initiatives. **Jessica Jacovidis** will serve as Principal Strategist and Senior Researcher, working directly with JMU CARE leadership and faculty affiliates to shape research concepts, facilitate proposal development, and guide methodological design. Because the work requested in this RFP involves strategic advising, interdisciplinary collaboration, and complex proposal development, the lead strategist remains directly engaged throughout the process. **Rachel Phillips** will serve as Project Manager, coordinating timelines, proposal logistics, documentation, and communication across collaborators. This role supports the organization of proposal development activities and helps ensure that deliverables are completed in accordance with sponsor requirements and submission timelines. Additional members of the Inflexion team, including **Jeanne Horst**, **Laura Williams**, and **Matt Coleman**, provide specialized expertise in research design, evaluation methodology, and quantitative and qualitative analysis. These team members participate in proposal development and research design activities as needed depending on the methodological or analytic requirements of individual projects. **DiDi Lund,** a communications and marketing specialist, and **Curt Sell,** a graphic designer, may contribute to projects that require communications strategy, visual design, or the preparation of client-facing materials and dissemination products.

Effort allocation varies depending on the number and complexity of proposals or research initiatives pursued during the contract period. In general, the Principal Strategist provides primary leadership across engagements, while project management support remains consistent across activities and additional technical expertise is incorporated as needed. Actual effort will vary depending on the number and complexity of proposals or research initiatives pursued during the contract period.

Role	Name	Primary Responsibilities	Estimated Effort
Principal Strategist / Senior Researcher	Jessica Jacovidis	Strategic advising, research design, proposal leadership	25-30%
Project Manager	Rachel Phillips	Project coordination, scheduling, documentation	20-25%
Methodology Support	Jeanne Horst	Evaluation design, research methods	10-15% (as needed)
Evaluation / Analysis Support	Laura Williams	Evaluation planning, analysis	10-15% (as needed)
Research & Analysis Support	Matt Coleman	Research support, data analysis	5-10% (as needed)
Communications, Marketing, & Graphic Design	DiDi Lund Curt Sell	Specialized expertise in communications, marketing, and graphic design as needed to support specific proposal or research activities	As required
Additional Subject-Matter or Technical Specialists	Varies by project	Specialized expertise (e.g., advanced methodology, policy analysis, or technical writing) engaged as needed to support specific proposal or research activities	As required

Biographical summaries for key personnel are provided below, with full resumes included in Appendix C.

Dr. Jessica Jacovidis | Principal Investigator and Lead Research Advisor

Dr. Jessica Jacovidis has over 16 years of experience in education research, program evaluation, and assessment. She leads Inflexion's research and evaluation practice, overseeing a diverse portfolio of studies focused on program effectiveness, equity, and systems improvement across K–12, postsecondary, and workforce contexts. Her work bridges research and practice, combining methodological rigor with practical insight to help organizations use evidence to strengthen policy, implementation, and long-term impact. Jessica has directed national and international research and evaluation studies for partners such as the AVID Center and the International Baccalaureate Organization (IBO), leading projects examining metacognition, assessment innovation, inclusion, and digital learning. In addition to large-scale evaluation work, Jessica regularly supports research centers and educational organizations in designing competitive grant proposals, developing research frameworks, and strengthening internal evaluation capacity. Her experience includes mixed-methods research design, longitudinal analysis, qualitative inquiry, and collaborative evaluation processes that support organizational learning. Jessica holds a PhD in Assessment and Measurement from James Madison University and maintains a strong professional network across the university and broader research community. Her longstanding familiarity with JMU's institutional environment allows her to provide informed guidance on research development, grant strategy, and interdisciplinary collaboration.

Dr. S. Jeanne Horst | Senior Evaluation Consultant

Dr. S. Jeanne Horst has more than 24 years of experience in educational research, measurement, and evaluation, with deep expertise in quantitative methods, assessment design, and applied research. As a senior evaluation consultant for Inflexion, she contributes methodological expertise supporting research design, data analysis planning, and instrument development. Prior to joining Inflexion, Jeanne served as Director of Research and Evaluation for CommonLit, a nonprofit literacy organization where she led nationwide research examining the effectiveness of CommonLit's curriculum. Her work included a range of research designs, from case studies to quasi-experimental studies, with a focus on improving literacy outcomes for students from historically underserved communities. Earlier in her career, Jeanne served as a tenured professor teaching statistics and research design to graduate students and providing assessment consultation across academic programs. She has authored numerous publications on assessment, measurement, test-taking motivation, propensity score matching, and research design. Jeanne holds a PhD in Assessment and Measurement from James Madison University.

Dr. Laura Williams | Senior Evaluation Consultant

Dr. Laura Williams brings over 21 years of experience in educational research, assessment design, and program evaluation. Her work focuses on measurement validity, assessment systems, and the use of data to inform continuous improvement. Laura currently serves as a Senior Lead Assessment Strategist on the Credential Integrity team at Western Governors University (WGU), where she collaborates across academic and operational units to develop university-wide standards and policies for assessment within WGU's competency-based education model. Her work includes assessment design, psychometric analysis, and evaluation of program effectiveness. Her research has examined test-taking motivation in low-stakes testing environments and the implications of motivation for score validity and interpretation. This expertise strengthens the Inflexion team's capacity to design high-quality research instruments and interpret complex educational data. Laura holds a PhD in Assessment and Measurement from James Madison University.

Dr. Matt Coleman | Executive Advisor

Dr. Matt Coleman has more than 25 years of experience in education leadership, systems improvement, and organizational development. As Chief Executive Officer of Inflexion, he provides strategic oversight for the organization's statewide and national initiatives. Matt's work focuses on helping education systems strengthen leadership capacity, align programs and policies with long-term goals, and build sustainable improvement strategies. Prior to joining Inflexion, he served in a variety of leadership roles within the education system, including teacher, principal, director of secondary education, and assistant superintendent. In these roles he led districtwide initiatives that improved graduation rates, reduced dropout rates, and narrowed achievement gaps. His experience integrating leadership practice with research-based improvement frameworks provides valuable perspective for organizations navigating complex system-level change. Matt holds a Doctorate in Education from the University of Oregon.

Rachel Phillips | Project Manager

Rachel Phillips brings over 15 years of experience managing education programs, professional learning initiatives, and research and evaluation projects. As a project manager at Inflexion, she oversees coordination across project teams to ensure that complex initiatives remain organized and on schedule. Rachel's responsibilities include project planning, deliverable tracking, coordination of stakeholder engagement activities, and support for survey and focus group implementation. She is known for her strong organizational skills, attention to detail, and ability to maintain momentum across projects that involve multiple collaborators. Her work emphasizes clear communication, efficient

project management systems, and continuous improvement practices that help partners maintain visibility into project progress and deliverables.

Dorthy "DiDi" Lund | Communications and Marketing Specialist

Dorthy "DiDi" Lund is a communications specialist with more than 15 years of experience leading brand development, messaging, and engagement strategies across education, nonprofit, SaaS, and healthcare sectors. At Inflexion, she supports research and evaluation teams by translating complex ideas into clear and compelling narratives for diverse audiences. Her work includes development of communication frameworks, visual storytelling strategies, and dissemination materials that connect research findings to real-world impact. DiDi's background in political science and data-informed communication helps ensure that research findings and technical insights are presented in ways that resonate with practitioners, policymakers, and community stakeholders.

Curt Sell | Graphic Designer

Curt Sell is a senior graphic designer with more than 30 years of experience translating complex information into visually clear and compelling communications. Since joining Inflexion in 2015, he has supported numerous education initiatives by designing reports, visual data displays, and communication materials that help organizations communicate research findings and program impact. Curt's design work emphasizes clarity, accessibility, and usability across both print and digital formats. His approach ensures that research findings, program models, and evaluation results are presented in ways that are understandable and engaging for a wide range of audiences.

IV.B.15. Continuity and Contingency Coverage

Explain your contingency coverage model for key personnel absences to maintain continuity of deliverables and on-site data collection.

Inflexion maintains continuity of service through a staffing approach that combines clear leadership, shared visibility into active work, and backup support for key functions. Jessica Jacovidis will serve as the primary lead for this engagement, but continuity is supported by a broader team that remains familiar with active proposals, research planning, and project timelines. If temporary coverage is needed for research design, proposal development, or methodological advising, Jeanne Horst and Laura Williams can provide senior-level support in those areas. Both have experience in research design, instrument development, evaluation planning, and data analysis, and both can step in to support ongoing work when projects require additional coverage. If extended coverage is required, Inflexion can

reassign responsibilities across senior staff to ensure that project deliverables and timelines remain on track.

Continuity is also supported through project management. Rachel Phillips maintains schedules, tracks milestones and deliverables, and organizes documentation and communication across collaborators. This ensures that project information, draft materials, and next steps remain visible and accessible even if responsibilities need to shift temporarily.

For on-site meetings or local research activities, Inflexion's Harrisonburg-based leadership provides the primary local presence for this work. If temporary support is needed during a period of absence, the team works with JMU CARE to adjust meeting schedules, redistribute responsibilities, or provide additional support through other team members already familiar with the project. This approach allows Inflexion to maintain continuity of deliverables, communication, and project coordination while responding flexibly to temporary staffing changes.

IV.B.16. Ongoing Professional Development for Project Staff

Describe ongoing training for project staff assigned to JMU.

Inflexion supports ongoing professional development for staff assigned to JMU CARE through a combination of engagement with research communities, applied learning through project work, monitoring of emerging funding priorities, and internal knowledge sharing across the organization. These activities help ensure that staff remain current in research methods, grant development practices, and evolving priorities within education research and evaluation.

Engagement with Research Communities. Senior researchers regularly engage with professional communities focused on educational research, evaluation, and measurement. This includes participation in professional associations, academic conferences, and scholarly publication processes. Engagement with these communities allows staff to remain informed about emerging methodological approaches and evolving expectations within the research field.

Applied Learning Through Project Work. A significant portion of professional development occurs through the team's work across diverse research and evaluation initiatives. Projects frequently involve mixed-methods research design, survey development, qualitative inquiry, and analysis of administrative data across multiple program contexts. Working across these varied research environments allows staff to continually refine methodological approaches and expand analytic expertise.

Monitoring Funding Priorities and Research Trends. Staff regularly monitor funding announcements and agency guidance from organizations such as the National Science Foundation (NSF), the Institute of Education Sciences (IES), and major philanthropic foundations. This ongoing review helps the team remain aware of emerging research priorities, proposal review criteria, and evolving expectations for methodological rigor within competitive grant programs.

Internal Knowledge Sharing. Inflexion also supports ongoing learning through internal knowledge sharing across project teams. Staff regularly exchange insights from active projects, including lessons learned from proposal development, evaluation studies, and research collaborations. These discussions allow team members to share new methodological approaches and strengthen collective expertise across the organization.

Through these combined activities, staff supporting JMU CARE remain current in research design, evaluation methods, and grant development practices, ensuring that the Center receives informed and up-to-date guidance across proposal development and research initiatives.

IV.B.17. Work Samples

Provide examples (or anonymized excerpts) of grant narratives, budgets, strategic plans, research designs, logic models, evaluation plans, data instruments, analyses, and visualizations you have produced.

Inflexion has produced a wide range of materials supporting grant development, research design, strategic planning, and program evaluation. These artifacts reflect the organization's integrated approach to helping partners design competitive proposals, implement rigorous studies, and translate research findings into practical guidance for decision-makers.

Because the examples requested in this section span multiple types of deliverables—including grant narratives, budgets, research designs, evaluation plans, instruments, analyses, and visualizations—representative examples have been compiled in a shared folder for reviewer access.

The folder includes selected excerpts and sample materials from prior projects that illustrate the scope and quality of work produced by Inflexion and its research staff. Where appropriate, materials have been anonymized to protect partner confidentiality.

Representative work products are available here:
https://drive.google.com/drive/folders/1PDUUUBD2fLq0JwqBmNTLJqSi8QbO2eF2?usp=sharing

Additional materials can be provided upon request.

IV.B.18. Quality Assurance Processes

Describe your editorial, technical, accessibility, and methodological QA processes.

Inflexion integrates quality assurance into each stage of project development to ensure that deliverables (including grant proposals, research designs, evaluation plans, reports, and dissemination materials) meet high standards of methodological rigor, technical accuracy, clarity, and accessibility. Quality assurance is not treated as a final editing step but is incorporated throughout the development of research and proposal materials.

Methodological Review. Methodological review begins during the design phase of a project and continues throughout the development of research and evaluation activities. Senior researchers review the alignment among research questions, conceptual frameworks, logic models, data collection strategies, and analytic plans to ensure that the proposed methods are appropriate for the questions being addressed. For projects using mixed methods approaches, review also focuses on ensuring that qualitative and quantitative components are logically integrated and that the study design supports meaningful interpretation across multiple sources of evidence. Research instruments, sampling strategies, and analytic plans are reviewed internally to confirm that they align with the project's conceptual model and the decisions the research is intended to inform.

Technical and Analytic Review. Technical review focuses on the accuracy and integrity of analytic procedures and results. Quantitative analyses are reviewed by senior researchers to confirm that statistical methods are appropriate, assumptions are clearly documented, and results are interpreted correctly. When administrative datasets or survey data are used, data preparation steps and analytic procedures are reviewed to ensure that findings accurately reflect the underlying data. Qualitative analyses are reviewed through collaborative examination of coding frameworks and thematic interpretations to confirm that conclusions are supported by the evidence collected. This review process helps ensure that analytic findings presented in reports or proposals are well grounded in the data.

Editorial Review. Editorial review focuses on clarity, coherence, and consistency across deliverables. Draft materials are reviewed to ensure logical organization, alignment across sections, and consistency between narrative descriptions, tables, figures, and supporting

evidence. Particular attention is given to ensuring that complex methodological or analytic concepts are explained clearly so that both technical and non-technical audiences can understand the findings and their implications. Editorial review also confirms that proposals and reports respond directly to sponsor requirements or project objectives.

Accessibility Review. Accessibility considerations are incorporated throughout the preparation of written and visual materials. Reports, presentations, and other deliverables are structured to support readability through clear headings, summaries, and visual elements that help audiences navigate complex information. When digital or web-based materials are developed, the team follows recognized accessibility practices to ensure that documents and visual materials can be used effectively by individuals with varying abilities. This includes attention to formatting, visual contrast, and document structure so that materials remain accessible across different viewing formats and assistive technologies.

Through this integrated quality assurance process, combining methodological, technical, editorial, and accessibility review, Inflexion ensures that deliverables meet high standards of rigor, clarity, and usability while remaining responsive to the needs of project partners and stakeholders.

IV.B.19. Project Documentation, Archiving, and Handoff

Explain how your firm organizes and archives project artifacts to enable sustainability and handoff to JMU teams.

Inflexion organizes project artifacts in ways that support continuity during the engagement and sustainability after individual projects conclude. For this work, the team will use JMU-approved systems and shared collaboration spaces so that JMU CARE retains access to project materials throughout the engagement rather than relying on a separate handoff process at the end. This approach allows project files, drafts, and supporting documentation to remain visible to JMU teams as the work develops.

Project artifacts are maintained in structured folders that support both active collaboration and long-term use. Depending on the initiative, these materials may include proposal drafts, research designs, evaluation frameworks, logic models, data collection instruments, analytic documentation, reports, and related planning materials. Organizing these materials as they are developed helps ensure that project records remain complete and usable rather than requiring reconstruction after the fact.

Inflexion also documents project materials in ways that preserve their context. Instruments are stored with notes about their intended use and any revisions made during the project.

Analytic documentation is maintained alongside summaries or explanatory notes that clarify what was done and how findings should be interpreted. This helps ensure that materials remain understandable and reusable for future proposals, research activities, and evaluation work.

Because many activities supported through this engagement contribute to ongoing institutional initiatives, documentation and archiving are designed to support cumulative work overtime. Proposal language, conceptual frameworks, logic models, research instruments, and analytic approaches developed for one initiative can be retained, adapted, and refined for future use. This allows JMU CARE to build on prior work rather than starting from scratch each time a new opportunity emerges.

At project closeout or other transition points, Inflexion works with JMU CARE to confirm that files are complete, organized, and accessible within JMU systems. This process may include compiling final versions of key materials, documenting major methodological decisions and lessons learned, and conducting a close-out meeting with project leadership to review outcomes and next steps. Because the documentation is maintained throughout the project lifecycle, this closeout process is straightforward and supports continuity for future work.

IV.B.20. Data Management and Security Practices

Summarize your firm's data management plans (security, privacy, retention, access controls), including how FERPA-adjacent education data and research data management is handled.

Inflexion maintains structured data management practices designed to protect participant privacy, safeguard research data, and ensure that project materials remain accessible to authorized collaborators. Because many projects supported by the organization involve education systems and mixed-methods research, data governance practices are designed to align with widely accepted standards for educational research, human subjects protection, and responsible data stewardship. Data management practices address the full lifecycle of research data, including planning, storage, access control, analysis, reporting, and long-term archiving.

Data Governance and Planning. Data management planning begins during the research design phase of each project. At this stage, the team works with project partners to identify the types of data that will be collected, the level of sensitivity associated with those data, and the procedures required to protect participant privacy. These planning discussions typically address the types of participant information being collected, whether identifiable

data are necessary for the analysis, how data will be transferred between collaborators, and what protections are required by institutional policies or research agreements. When projects involve university partners, data management practices are aligned with institutional policies governing research data and human subjects protection.

Secure Storage and Access Controls. Research files, datasets, analytic outputs, and related documentation are stored in secure digital environments with access limited to authorized project personnel. Whenever possible, project materials are maintained within partner-approved systems so that institutional teams retain visibility into project data and documentation throughout the lifecycle of the work. Access to research data is managed through role-based access controls, meaning that team members are granted access only to the information necessary for their responsibilities. For example, researchers conducting data analysis may access raw datasets, while collaborators contributing to reporting may work with aggregated or de-identified data. When data must be transferred between collaborators, secure file-sharing platforms designed for professional collaboration are used rather than unsecured communication channels.

Handling FERPA-Adjacent Education Data. Many education research projects involve student-level or institutional data that fall within or adjacent to the protections established by the Family Educational Rights and Privacy Act (FERPA). Inflexion works with partner institutions to ensure that research activities involving education data comply with institutional data governance policies and applicable privacy requirements. Whenever possible, datasets used for analysis are de-identified or aggregated prior to analysis. Removing or masking direct identifiers helps reduce the risk that individual participants can be identified in research outputs. When identifiable data must be used (such as in longitudinal analyses or when linking records across datasets) access is restricted to authorized researchers and managed in accordance with approved research protocols and institutional data-sharing agreements.

Human Subjects Protection and IRB Compliance. When projects involve human subjects research, Inflexion works with partner institutions to ensure that research activities comply with Institutional Review Board (IRB) requirements. This may include assisting with the preparation of research protocols, development of consent and assent materials, documentation of recruitment procedures, and preparation of data security plans. Because IRB requirements influence both data collection procedures and data protection practices, these processes are typically addressed early in project planning to ensure that research activities remain compliant with institutional expectations.

Data Analysis and Responsible Reporting. Data analysis is conducted in environments designed to protect the integrity of research data while supporting rigorous analytic work.

Analytic procedures are documented so that findings can be clearly understood and reproduced when necessary. Research findings are typically reported using aggregated or de-identified data to protect participant privacy. When results are shared publicly, care is taken to ensure that descriptions of findings do not inadvertently reveal identifying information about individual participants or small groups.

Data Retention, Archiving, and Disposal. At the conclusion of a project, research artifacts are organized and archived in accordance with the partner organization's requirements and any applicable research agreements. Final project materials (including reports, instruments, analytic summaries, and supporting documentation) are transferred or maintained within partner systems so that institutions retain full access to the materials developed through the project. Sensitive datasets are retained only as long as necessary to complete project analyses or meet contractual obligations. When retention is no longer required, files containing sensitive information are securely deleted in accordance with standard data protection practices.

Through these data management practices (including secure storage, role-based access controls, responsible handling of education data, and structured documentation) Inflexion ensures that research data are managed responsibly throughout the lifecycle of each project while protecting participant privacy and maintaining the integrity of research findings.

IV.B.21. Institutional Review Board (IRB) Processes

Describe your firm's familiarity with IRB processes and responsible conduct of research training for staff supporting data collection/evaluation.

Inflexion has extensive experience working with Institutional Review Boards (IRBs) and supporting research projects that involve human participants across university, school district, and community-based contexts. Members of the research team have both practical and governance-level experience with IRB processes, responsible conduct of research training, and institutional human subjects protection policies.

The firm maintains a Federalwide Assurance (FWA) for human subjects research and regularly works with external IRB providers such as Sterling IRB when projects require independent review. Staff participating in research involving human subjects complete CITI training and maintain certification in responsible conduct of research and human subjects protections. These requirements apply to all personnel who may have access to participant data or who participate in data collection activities.

The lead researcher brings particularly deep expertise in IRB processes. She served for six years as a reviewer on a university Institutional Review Board, evaluating research protocols involving student populations, educational interventions, and survey-based studies. In addition, while working at James Madison University's Center for Assessment and Research Studies, she helped negotiate a memorandum of understanding with the JMU IRB governing assessment-related data collection and contributed to the development of institutional policies related to IRB compliance and research data practices.

Through this experience, the team has extensive familiarity with IRB protocol preparation and review processes, including:

- determining appropriate levels of review (exempt, expedited, or full board)
- preparing research protocols and study descriptions
- developing participant recruitment strategies
- preparing informed consent and assent documentation
- designing data protection and confidentiality procedures
- ensuring compliance with institutional data security policies

In practice, Inflexion frequently supports research teams during the IRB readiness phase of a project. This includes reviewing draft protocols and instruments, ensuring that recruitment and consent materials align with institutional templates, advising on data security and data sharing language, and providing feedback to strengthen IRB submissions before they are entered into institutional systems. This proactive review process helps reduce revision cycles and accelerates the approval timeline.

The firm has also worked directly with the JMU CARE team to review IRB applications, advise on protocol preparation, and walk through submission processes within institutional systems, ensuring that research activities are aligned with university policies and that documentation meets IRB expectations.

Because Inflexion frequently conducts mixed-methods research involving surveys, interviews, focus groups, and administrative data analysis, team members understand the ethical responsibilities associated with collecting, storing, and analyzing participant data. All research activities follow responsible conduct of research principles related to confidentiality, data integrity, and protection of human subjects.

Through this combination of IRB governance experience, protocol development expertise, and ongoing collaboration with university research offices, Inflexion ensures that research activities conducted in partnership with JMU CARE adhere to the highest standards of ethical research practice and institutional compliance.

IV.B.22. Hosting Solutions and Storage

If proposing hosted solutions or storage, describe environments, backup/DR, encryption, and admin controls; include optional costs.

Inflexion is not proposing any hosted software platforms, proprietary data systems, or long-term storage environments as part of this engagement. Project materials such as proposal drafts, research designs, evaluation plans, and reports are typically developed using collaborative tools selected in coordination with the partner organization. Whenever possible, project artifacts and research materials will be stored within systems designated or approved by James Madison University. Inflexion will follow JMU's IT policies and data governance requirements for any data collection, storage, or sharing activities conducted as part of this work. Because no hosted platforms or storage services are being proposed, there are no additional hosting or infrastructure costs associated with this proposal.

IV.B.23. Risk and Mitigation Strategies

Identify typical risks and your mitigation strategies. Provide a sample risk register.

Inflexion uses a proactive, adaptive project management approach to identify and manage risks that may affect project timelines, research quality, or collaborative work processes. Because the services described in this proposal involve grant development, research design, evaluation planning, and strategic advising within complex institutional environments, risk management is integrated directly into routine project planning and coordination rather than treated as a separate compliance activity.

Projects of this nature typically involve multiple collaborators, evolving research ideas, institutional approval processes, and externally determined proposal deadlines. These conditions require continuous monitoring of project progress, early identification of potential constraints, and clear communication structures that allow issues to be addressed quickly when they arise. Inflexion's approach focuses on anticipating risks early, incorporating mitigation strategies into project schedules, and maintaining flexibility so that projects can adapt to changing circumstances without compromising research quality or deliverable timelines.

Several practices support this approach. The project team uses structured back-planning schedules for proposal development and research implementation, allowing adequate time for drafting, revision, institutional approvals, and stakeholder input. Milestones are tracked by the project manager and reviewed regularly during planning and coordination meetings. Because Inflexion works closely with project partners throughout the project lifecycle, emerging challenges can be identified quickly and addressed collaboratively.

The types of risks most commonly encountered in projects of this nature fall into several broad categories.

Logistical and coordination risks may arise when aligning schedules across multiple collaborators, coordinating proposal development timelines with institutional review processes, or organizing stakeholder engagement activities such as interviews, focus groups, or planning sessions. These risks are mitigated through early scheduling coordination, milestone tracking, and flexible engagement options that allow participation across a range of stakeholder schedules.

Research and methodological risks may occur when access to certain data sources is limited, when comparison groups are difficult to identify, or when research designs must balance methodological rigor with practical constraints. Inflexion addresses these challenges through collaborative research design processes that clarify assumptions, identify potential data sources early, and develop mixed methods strategies that allow multiple forms of evidence to contribute to project findings.

Institutional and administrative risks are common in university environments, where proposal submission processes, budget approvals, and Institutional Review Board (IRB) review timelines can influence project schedules. Because the Inflexion team regularly works within these environments, project timelines are developed with these institutional processes in mind. Early planning for proposal submission requirements, budget preparation, and IRB readiness helps reduce the likelihood of delays.

Stakeholder engagement risks may occur when recruiting participants for interviews, focus groups, or collaborative planning activities. In some cases, certain stakeholder groups may have limited availability or competing demands on their time. To mitigate this risk, data collection and engagement plans are designed to provide multiple opportunities for participation and to ensure that a representative range of perspectives is included in the project.

Finally, **external and environmental risks**, such as shifts in funding priorities, changes in institutional leadership, or evolving program goals, can influence the direction of research and grant development work. Inflexion addresses these uncertainties through an adaptive management approach that allows project strategies to evolve as new information becomes available.

Risk monitoring is integrated into routine project management activities. During regular coordination meetings, the project team reviews the status of ongoing workstreams and discusses potential challenges that could affect timelines, collaboration, or research implementation. When risks emerge, mitigation strategies are documented and

incorporated into the evolving project plan. A sample risk register illustrating typical risks and mitigation strategies for projects of this nature is provided in Appendix D.

IV.B.24. Project Start-Up and Wind-Down

Describe your plan for project start-up and wind-down, including transfer of knowledge, files, and documentation to JMU to support sustainability.

Inflexion approaches project start-up and wind-down as integral phases of the project lifecycle that ensure work begins with clear alignment and concludes with full transfer of knowledge, documentation, and materials to JMU CARE. Because the Inflexion team has already been working closely with JMU CARE over the past year as a strategic research and grants advisor, many foundational relationships, collaboration structures, and working practices are already in place. As a result, the start-up phase for this engagement will focus primarily on confirming priorities, formalizing processes within the contract structure, and ensuring that project documentation continues to be organized in ways that support long-term sustainability for the center.

Project Start-Up. At the outset of the engagement, the Inflexion team will work with JMU CARE leadership to confirm project priorities and establish a shared understanding of expectations for communication, decision-making, and project coordination.

The start-up process typically includes a project kickoff meeting involving JMU CARE leadership and any relevant collaborators. During this meeting, the team reviews the scope of services, discusses anticipated grant development opportunities, and confirms communication and coordination practices that will guide the work. Because the engagement often involves multiple concurrent workstreams (including proposal development, research design, evaluation planning, and strategic advising) this conversation helps establish shared expectations regarding timelines, roles, and collaboration processes.

Following the kickoff meeting, the team develops a working project roadmap outlining anticipated activities, milestone schedules, and priority areas of support. Given that grant development and interdisciplinary research initiatives frequently evolve in response to emerging funding opportunities, this roadmap functions as a flexible planning framework rather than a rigid work plan. It allows the team to track current priorities while maintaining the agility required to respond to new opportunities.

The start-up phase also includes a review of existing materials relevant to JMU CARE's research and funding portfolio. These materials may include prior proposals, research agendas, evaluation plans, program documentation, and existing partnerships across the

university. Because the Inflexion team has already been supporting JMU CARE in these areas, this review serves primarily to update documentation and ensure that the most current materials are incorporated into project planning.

Collaboration systems will continue to operate through JMU-approved platforms, particularly shared Microsoft Teams workspaces and institutional document repositories used by JMU CARE. Organizing project materials directly within JMU systems ensures that the center maintains continuous access to working documents, proposal drafts, research instruments, and project documentation as the work progresses.

Project Wind-Down and Sustainability. While the start-up phase establishes alignment and coordination systems, the wind-down phase focuses on ensuring that knowledge and materials developed during the engagement remain accessible and usable by JMU CARE after the project concludes. Throughout the engagement, project artifacts (proposal drafts, research designs, evaluation frameworks, logic models, data collection instruments, analytic documentation, and reports) are organized within JMU-managed storage systems rather than maintained solely within Inflexion's internal infrastructure. This approach ensures that documentation is continuously available to the JMU CARE team and reduces the need for large-scale file transfers at the end of the engagement.

As the project approaches completion, the Inflexion team will conduct a structured closeout process that focuses on documentation review, knowledge transfer, and reflection on project outcomes. This process typically includes verifying that all project artifacts are fully organized within JMU systems, documenting key methodological decisions and project lessons learned, and meeting with JMU CARE leadership to review outcomes and discuss potential next steps. Because many activities supported through this engagement contribute to ongoing institutional initiatives, the closeout process is designed to ensure that the work completed during the engagement can continue to inform future projects, funding proposals, and research collaborations.

Supporting Long-Term Capacity. A central goal of Inflexion's approach is to strengthen the long-term research and evaluation capacity of partner organizations. Throughout the engagement, project activities include ongoing explanation of research methods, proposal development strategies, and evaluation design decisions so that JMU CARE staff and faculty partners can apply these approaches in future work.

By documenting project materials within JMU systems, maintaining transparent collaboration practices, and supporting capacity building throughout the engagement, the project structure ensures that knowledge generated during the engagement remains

available to the JMU CARE team and continues to support the center's work beyond the formal project period.

IV.B.25. Issue Identification, Escalation, and Resolution

Describe your approach to identifying, escalating, and resolving issues or defects that arise during the project or within project deliverables

Inflexion treats issue management as a routine component of project management and quality assurance. Projects involving grant development, research design, and evaluation planning often evolve as new information emerges, funding guidance changes, or institutional requirements become clearer. The team therefore focuses on identifying potential issues early, addressing them quickly, and resolving them collaboratively with project partners to maintain project momentum and deliverable quality.

Issue Identification. Potential issues are most effectively addressed when they are identified early. For this reason, monitoring and review are built directly into routine project activities rather than handled only at formal project checkpoints. Issue identification typically occurs through several mechanisms, including regular coordination meetings with JMU CARE leadership, internal team reviews of active workstreams, and structured review of draft deliverables prior to submission. During grant development and research design activities, the team also continuously monitors sponsor guidance, proposal instructions, and institutional requirements to ensure that developing materials remain aligned with external expectations. Because many deliverables are developed collaboratively, the team uses shared working documents and version tracking to surface questions, revisions, or emerging challenges as they occur. This collaborative drafting environment allows issues to be identified quickly before they affect timelines or final deliverables.

Issue Escalation. When an issue arises that could affect project scope, research design, timelines, or deliverable quality, the team follows a clear escalation process. The issue is first reviewed internally to determine its scope, urgency, and potential impact. If the issue requires a strategic decision or may affect the direction of the work, it is elevated to the project lead and discussed with JMU CARE leadership. Because the engagement involves close collaboration between teams, escalation typically occurs through direct communication during scheduled meetings or through prompt follow-up conversations when time-sensitive decisions are required. This approach ensures that project leadership has the context necessary to make informed decisions while minimizing disruption to ongoing work.

Issue Resolution. Resolution strategies are determined collaboratively with JMU CARE leadership and are tailored to the nature of the issue. Depending on the circumstances, resolution may involve refining research design approaches, clarifying sponsor requirements, adjusting timelines, revising deliverables, or incorporating additional review steps to ensure accuracy and clarity. When changes affect work already in progress, the team documents the decision and incorporates updates into the next iteration of the project plan or deliverable draft. Maintaining clear documentation ensures that all collaborators understand the rationale for decisions and the steps required moving forward.

Continuous Improvement. Issue management also serves as a mechanism for continuous improvement. Lessons learned during earlier phases of the project are incorporated into later stages of the work, strengthening workflows, improving coordination practices, and reducing the likelihood of similar challenges occurring again.

Through early identification, transparent escalation, and collaborative problem-solving, Inflexion ensures that issues are addressed efficiently while maintaining the quality and integrity of project deliverables.

IV.B.26. Pricing Schedule

Provide comprehensive pricing for proposed services in Section X. Pricing Schedule.

Inflexion provides services to JMU CARE through a retainer-based professional services model designed to support ongoing strategic advising, grant development, research design consultation, and evaluation support. This model reflects the collaborative and adaptive nature of the work described in this proposal, where activities may shift over time as new funding opportunities emerge, research initiatives evolve, and institutional priorities change.

Under this structure, JMU CARE contracts for a defined number of professional service hours that may be used flexibly across the range of services described in the scope of work. These hours may be allocated to activities such as proposal development, research design consultation, methodological advising, instrument development, evaluation planning, stakeholder engagement activities, and project implementation support. This flexible approach allows JMU CARE to draw on Inflexion's expertise as needed without requiring separate scopes of work for each individual activity.

Retainer-Based Strategic Support (Primary Model)

The proposed pricing structure is based on an annual retainer model that provides JMU CARE with a defined number of hours of professional support each year. The retainer establishes predictable access to Inflexion's research and advisory expertise while allowing the Center to determine how those hours are used across its evolving portfolio of projects.

Under this model, the retainer fee is calculated based on Inflexion's standard professional services rate of **$225 per hour**. This rate reflects the blended expertise of the consulting team supporting the engagement, including senior research leadership, methodological expertise, and project management coordination.

For planning purposes, the following annual service structure is proposed:

Cost Category	Description	Amount
Base Service Fee	533 hours of service at $225 per hour per year	$120,000 annually
Hourly Rate	Rate for additional hours beyond the contracted allotment	$225 per hour
Rollover Hours	Up to 20% of unused hours may roll over to the following contract year	No additional cost
Travel Expenses	Reimbursed according to federal travel reimbursement guidelines	Variable

This structure provides JMU CARE with approximately **533 hours of professional support per year**, equivalent to roughly **10 hours of service per week** across the contract period.

Allocation and Use of Hours. Hours contracted under the retainer may be used across the full range of services described in the scope of work. These services may include, but are not limited to:

- grant proposal development and strategic funding consultation
- research design and evaluation planning

- survey and instrument development
- mixed-methods research consultation
- data analysis planning and methodological advising
- strategic planning and organizational consultation
- development of theories of change and logic models
- project implementation support for funded initiatives
- preparation of reports, presentations, and research dissemination materials

Because the Center's work often involves multiple overlapping initiatives, this flexible model allows JMU CARE leadership to determine how best to allocate Inflexion's expertise across projects throughout the year.

Monthly Service Planning. To ensure sustainable scheduling and predictable project management, Inflexion typically provides up to 80 hours of service per month under the retainer agreement. This pacing structure supports consistent collaboration while allowing the Center to scale activity during periods of increased demand such as major grant submission deadlines. Work exceeding the monthly service threshold may be accommodated with advance approval, depending on staff availability and project priorities.

Additional Hours. If the Center's needs exceed the annual retainer allotment, additional hours may be purchased at the standard professional services rate of $225 per hour. This allows JMU CARE to scale support during periods of increased activity, such as the preparation of major grant proposals or the implementation of newly funded research projects.

Rollover Policy. To provide flexibility in how the Center uses its contracted hours, unused service hours may roll over from one contract year to the next. Up to 20 percent of the annual hour allocation may be carried forward into the following contract year. Rollover hours must be used within 90 days of the start of the new contract year. This policy allows the Center to maintain continuity of support while accommodating fluctuations in project intensity throughout the year.

Separate Project Contracts. When Inflexion is included directly in the budgets of externally funded projects, those activities will be governed by separate project-specific agreements aligned with the requirements of the funding agency and the project's scope of work. In such cases, retainer hours may still be used for complementary activities such as proposal preparation, methodological consultation, or early-stage project planning at the discretion of JMU CARE leadership.

Travel Reimbursement. Travel expenses incurred by Inflexion in support of this engagement will be reimbursed by JMU CARE in accordance with federal reimbursement guidelines. Reimbursable expenses may include transportation, lodging, mileage, and per diem. When possible, travel may be arranged directly through JMU CARE as part of group travel arrangements or institutional booking systems.

Payment Terms. Inflexion is flexible with payment schedules and will work with JMU CARE to align invoicing with university fiscal procedures. Payment may be made annually, quarterly, or in full at the start of the contract period depending on JMU CARE's preference and internal budgeting processes.

Optional Pricing Structures

While the retainer model provides the primary structure for this engagement, Inflexion may also provide services through alternative pricing mechanisms when appropriate for specific projects or funding arrangements. These options are typically negotiated on a project-by-project basis.

Fixed-Price Agreements. For projects with clearly defined scopes of work and deliverables, Inflexion may develop a fixed-price agreement. Under this model, the project scope, timeline, and deliverables are established in advance, and the total project price is calculated based on estimated hours required to complete the work. This structure is often appropriate for activities such as development of evaluation plans, creation of research designs, development of data collection instruments, or preparation of specific strategic planning deliverables. Fixed-price agreements provide cost predictability for the client and are typically used when project requirements are well defined.

Cost-Reimbursement (Time-and-Materials). In some cases, projects may be structured as cost-reimbursement or time-and-materials agreements. Under this approach, services are billed based on the actual hours worked by project personnel using the standard hourly rate established for the engagement. This structure is commonly used when projects involve iterative development processes, multiple collaborators, or evolving research designs where the final level of effort cannot be determined at the outset.

When these alternative pricing approaches are used, the project scope, staffing structure, and estimated level of effort are documented in a short project-specific scope of work developed in collaboration with JMU CARE leadership.

V.B.6 VASCUPP Sales

Identify the amount of sales your company had during the last twelve months with each VASCUPP Member Institution. A list of VASCUPP Members can be found at: www.VASCUPP.org.

During the preceding twelve (12) months, Inflexion has conducted business with one VASCUPP member institution, James Madison University. This work is associated with an active contract valued at $90,000 that commenced in May 2025 and remains in progress as of the date of this proposal. Inflexion has not conducted business with any other VASCUPP member institutions during the past twelve months.

Appendices

Appendix A: Inflexion Education Research and Evaluation Services

Inflexion provides a wide range of services designed to support educational institutions and organizations in achieving their goals. Our commitment to rigorous research, thoughtful evaluation, and strategic consultation ensures that we provide the support you need to achieve your goals, promote equity, and enhance outcomes for all learners. Whether you are looking to evaluate a current program, develop new initiatives, or build capacity within your organization, Inflexion offers the expertise and partnership you need to succeed.

Overview and Organizational Structure

Inflexion's mission is to make schools work for *all* students by ensuring learning environments promote belonging, connection, and engagement while developing holistic life-ready skills. Our interactions with each other and our clients and partners are guided by our foundational beliefs and values; these maxims, in the figure to the right, also drive us to continually improve by learning *with* others in partnership and *from* the world's diversity of thought, talents, practices, and experiences.

Inflexion is composed of three work groups, including one that builds technology solutions for educators (**Edutech**); one that offers professional learning to school leaders (**Portico**); and one that offers research, evaluation, and analytic support to education entities (**Edulytix**). Edulytix draws on its members' long experience and deep strength in education research and program evaluation to help clients and partners develop, refine, and/or understand the practices and programs that improve education for all students.

Education Research and Program Evaluation Services

Grant Proposal Development and Support: Securing funding is often a critical component of implementing and sustaining educational programs. Inflexion provides comprehensive support throughout the grant development process to help organizations create compelling proposals that stand out.

- **Strategic Grant Consultation**: We assist organizations in identifying the most promising funding opportunities and developing strategies to align their proposals with funder priorities. This includes conducting preliminary research to ensure that the proposed program addresses a significant need.

- **Proposal Writing and Review**: Our team of experts offers full support in writing and refining grant proposals. We ensure that proposals are clear, coherent, and compelling, and that they meet all funder requirements. We also provide critical feedback on draft proposals to enhance their competitiveness.
- **Theory of Change and Logic Model Development**: We assist in creating theories of change and logic models that clearly articulate how the proposed program will achieve its desired outcomes. These tools are essential for demonstrating to funders that the program is well-planned and has a strong likelihood of success.

Thought Partnership and Critical Friend Services: Inflexion offers thought partnership and critical friend services to support organizations in their ongoing efforts to improve and innovate. These services provide an external, objective perspective that is essential for continuous improvement.

- **Strategic Consultation**: We act as a trusted advisor to educational leaders and organizations, providing ongoing strategic consultation and feedback. This partnership helps organizations navigate complex challenges, make informed decisions, and continuously improve their programs and practices.
- **Strategic Planning:** Inflexion provides strategic planning services that help educational institutions and organizations define their long-term goals, identify key priorities, and develop actionable plans to achieve them. We work collaboratively with stakeholders to assess current conditions, envision future possibilities, and create a roadmap that aligns resources, initiatives, and efforts with the organization's mission and vision. Our strategic planning process ensures that all actions are purposeful, coordinated, and designed to lead to sustainable improvements and success.
- **Critical Friend Review**: Inflexion offers critical friend services, where we provide an external, objective perspective on your programs and initiatives. We offer constructive feedback that challenges assumptions, identifies blind spots, and fosters a culture of continuous improvement.
- **Environmental Scans:** Inflexion conducts comprehensive environmental scans to assess the external and internal factors that could impact your organization's success. This process involves gathering and analyzing data on trends, challenges, opportunities, and key stakeholders in the educational landscape. By understanding the broader context in which your organization operates, our environmental scans help you make informed decisions, anticipate changes, and strategically position your organization for the future.
- **Collaborative Problem-Solving**: We work closely with your team to identify and address challenges. By leveraging our expertise in research, evaluation, and best practices, we co-create solutions that are effective, sustainable, and grounded in evidence.

Capacity Building and Technical Assistance: Building internal capacity is essential for organizations to sustain and scale their programs. Inflexion offers a range of capacity-building services designed to empower educators, administrators, and staff.

- **Evaluation Capacity Building**: We provide training and coaching to help staff develop the skills needed to conduct research and evaluations and use data effectively. This includes training on evaluation design, data collection methods, and data analysis techniques.
- **Program Implementation Support**: Inflexion offers ongoing technical assistance during the implementation phase of programs. Our support helps organizations navigate challenges, optimize strategies, and ensure that programs are delivered effectively.
- **Continuous Improvement**: Inflexion provides expert guidance on implementing Continuous Improvement strategies using Plan-Do-Study-Act (PDSA) cycles. We support organizations in developing the skills and structures needed to apply these cycles effectively. This includes identifying areas for improvement, planning and executing interventions, analyzing outcomes, and refining approaches based on data-driven insights.
- **Customized Professional Development Workshops**: We design and deliver workshops that are tailored to the specific needs of your organization. Our workshops cover a wide range of topics, including data equity, data-driven decision-making, evaluation techniques, and program improvement strategies.

Research and Program Evaluation: Inflexion offers rigorous research and evaluation services that are essential for understanding the effectiveness of educational programs and initiatives. Our approach includes both formative and summative evaluations to ensure that programs are continually improved and their impact is fully understood.

- **Formative Evaluations**: These evaluations are conducted during the development and implementation phases of a program. They provide real-time feedback that can be used to make necessary adjustments to enhance program effectiveness. By focusing on process evaluation, we help organizations refine their strategies and approaches to achieve better outcomes.
- **Summative Evaluations**: Conducted at the conclusion of a program, summative evaluations assess the overall implementation and effectiveness of a program. These evaluations help determine whether the program met its goals and provide insights into its long-term sustainability and scalability.
- **Impact and Outcome Studies**: We conduct comprehensive studies that track the long-term outcomes of educational programs. This includes analyzing the direct and indirect effects on student achievement, teacher practices, and organizational change. Our outcome studies often employ experimental or quasi-experimental longitudinal designs to capture data from participating and comparison groups over extended periods, providing a clear picture of the program's lasting impact.
- **Needs Assessments**: Before implementing a new program or initiative, we conduct thorough needs assessments to identify the specific challenges and opportunities within an organization. This ensures that programs are designed to address the most critical issues and are aligned with the institution's strategic goals.
- **Rapid-Cycle Evaluations**: These evaluations are designed to provide quick feedback on the effectiveness of new programs or interventions. By using agile methodologies, we help

organizations make timely adjustments that optimize program outcomes and ensure continuous improvement.

Data Collection and Analysis: Data is at the heart of all effective decision-making. Inflexion offers comprehensive data collection and analysis services that are tailored to meet the unique needs of each organization. Our services are designed to ensure that the data collected is accurate, relevant, and actionable.

- **Comprehensive Data Collection**: We utilize a variety of methods to gather data, including surveys, interviews, focus groups, classroom observations, and analysis of administrative records. Our data collection processes are designed to be inclusive, ensuring that all voices are heard and that the data reflects the diversity of the population being studied.
- **Advanced Statistical and Data Analysis**: Inflexion employs a wide range of statistical techniques, from basic descriptive statistics to complex multivariate analyses, to uncover trends and relationships in the data. We also use data modeling and predictive analytics to forecast future outcomes and support strategic planning.
- **Qualitative Data Analysis**: Our qualitative research team uses methods such as thematic analysis, grounded theory, and narrative analysis to explore complex educational phenomena. These methods allow us to capture rich, detailed insights that quantitative data alone cannot provide.
- **Mixed-Methods Research**: By integrating qualitative and quantitative approaches, we provide a comprehensive understanding of educational issues. This approach is particularly useful in evaluating complex programs where multiple types of data are needed to fully understand the outcomes.
- **Experimental and Quasi-Experimental Research:** Inflexion designs and implements both experimental and quasi-experimental studies to rigorously evaluate the impact of educational programs and interventions. For experimental designs, we employ randomized controlled trials (RCTs) to provide the highest level of evidence on program effectiveness. For quasi-experimental designs, we use methods such as matched comparison groups, regression discontinuity, or propensity score matching to establish causal relationships when random assignment is not feasible. Our approach ensures that evaluations are methodologically sound, providing robust data to inform decision-making and enhance educational outcomes.
- **Literature Reviews:** We conduct targeted and systematic literature reviews to synthesize existing research and evidence on specific educational topics. We gather and analyze relevant studies, reports, and publications to provide a thorough understanding of the current knowledge base. Our literature reviews help organizations identify best practices, gaps in the research, and opportunities for further investigation, ensuring that decisions and strategies are grounded in evidence.
- **Case Studies:** We develop and use case studies to illustrate the application and impact of specific programs or interventions. These in-depth analyses provide valuable insights into how similar strategies can be implemented successfully in other contexts.

- **Positive Deviance Studies:** We identify and study positive deviance or "bright spots"—individuals or groups within a community who achieve exceptional outcomes despite facing similar challenges as others. By analyzing what these outliers are doing differently, we extract actionable lessons that can be scaled to improve broader organizational or community practices.
- **Guidance on Data Equity**: We are committed to ensuring data collection and analysis processes are equitable. We provide guidance on how to design studies that are inclusive and account for the diverse needs and experiences of all students. This includes identifying and addressing potential biases in data collection instruments and analysis methods.

Survey and Instrument Development: Developing the right tools to measure educational outcomes is critical for any research or evaluation project. Inflexion offers expertise in creating and validating instruments that are reliable, valid, and aligned with program goals.

- **Researching Existing Instruments:** We conduct thorough reviews of existing instruments to determine their alignment with your program's goals. We explore the reliability and validity data of these instruments to assess their fit for purpose, ensuring they are suitable for your specific context and objectives.
- **Custom Survey Design and Validation**: We design surveys that are tailored to specific research questions and program objectives. Our process includes item development, cognitive testing, and pilot testing to ensure the surveys are both reliable and valid.
- **Qualitative Research Instruments**: We develop interview guides, focus group protocols, and observation tools that are culturally responsive and methodologically rigorous. These tools are essential for capturing the nuanced perspectives of participants and understanding the contextual factors that influence educational outcomes.
- **Empathy Interviews:** We design and conduct empathy interviews to gain deep insights into the experiences, emotions, and perspectives of students, educators, and other stakeholders. These interviews help uncover underlying needs and motivations, informing the development of programs and tools that truly resonate with the target audience.
- **Curriculum Audits**: Inflexion develops customized frameworks and rubrics for conducting curriculum audits based on the specific goals and needs of our clients. Whether the focus is on enhancing metacognitive strategies, integrating diversity, equity, and inclusion (DEI) principles, or other targeted areas, we design a process that rigorously evaluates how well the curriculum aligns with these objectives. Our audits go beyond traditional approaches, offering a comprehensive assessment that helps organizations identify strengths, gaps, and opportunities for improvement. We provide actionable recommendations to enhance curriculum quality and responsiveness to diverse student needs.
- **Rubric Development:** Inflexion specializes in the creation of clear, comprehensive rubrics tailored to assess specific skills, competencies, or program outcomes. We collaborate with educators and stakeholders to define criteria, performance levels, and descriptors that align with educational goals and standards. Our rubrics are designed to be practical tools that support consistent and objective evaluation, provide meaningful feedback, and guide

instructional improvements. Through careful development and validation processes, we ensure rubrics are both user-friendly and aligned with the desired learning outcomes.
- **Performance Metrics Development**: We work with organizations to establish clear, measurable performance metrics that can be used to track progress and evaluate success. These metrics are aligned with the organization's strategic goals and designed to be both practical and impactful.

Data Visualization and Reporting: Effective communication of research findings is essential for driving change. Inflexion offers comprehensive data visualization and reporting services that make complex data accessible and actionable.

- **Interactive Dashboards**: We create dynamic, user-friendly dashboards that allow stakeholders to explore data and trends in real-time. These dashboards are designed to be intuitive and customizable, providing stakeholders with the information they need to make informed decisions.
- **Custom Report Development**: Inflexion produces detailed reports that are tailored to the needs of different audiences. Our reports include technical details, executive summaries, and visual presentations that effectively communicate key findings and recommendations. Additionally, we create data summaries, short reports, and infographics that distill complex information into clear, concise, and visually engaging formats. These deliverables are designed to ensure that key insights are accessible and actionable for all stakeholders.
- **Storytelling with Data**: We use narrative techniques and data visualization to transform complex data into compelling stories that resonate with stakeholders. This approach helps ensure that research findings are not only understood but also acted upon.
- **Equity-Focused Reporting**: We design all of our reports and visualizations with an equity lens, ensuring that disparities are highlighted and that actionable insights are provided to address them.

If you are interested in a service that is not listed, we encourage you to reach out to us. We are always open to discussing the feasibility of custom projects and exploring how we can best support your specific needs.

Appendix B: Approaches to Our Work

Approach to Project Management

All Inflexion work divisions use an adaptive approach to project management, selecting the right techniques that best suit the project's objectives, environment, and collaborators to create the best opportunities for successful project delivery. Agile project management integrates well within an overall adaptive approach and will be used in the project. Growing out of software development, agile project management uses an iterative approach to promote adaptability, adjusting throughout the process rather than following a linear path. Agile management focuses on delivering the maximum value, balanced against priorities in the time and budget allowed. Agile projects commit set resources over limited periods of time to deliver products that are developed over successive cycles. Agile projects typically start with a rough idea of what is required and, by working iteratively to deliver portions of the work in short periods of time, edit and clarify the requirements as the project progresses. Agile project management philosophy focuses on empowering people and their interactions. The approach builds accountability, encourages a diversity of ideas, allows for early and constant delivery of value throughout a project, and promotes continuous improvement. The agile approach allows decisions to be tested and modified early in the project, supports discovery when requirements are uncertain, and helps build collaborator engagement by focusing on what is most beneficial (Association for Project Management, 2020).

Approach to Student and Family Engagement

We emphasize the engagement of the entire school community, including students and families. Through our work and experience with schools, we have found that student and family engagement is perhaps the most effective way of bringing a school's identity into alignment with the identity of the community it serves. Unfortunately, as many educators know, shared visions are not always developed in partnership with students, parents, and other members of the community. Further, surface level community engagement diminishes the power of shared visions for generating a mutual understanding of purpose and commitment from parents, students, and the broader community. Schools take a significant step toward creating culturally responsive learning approaches when they embrace and leverage the assets of their communities to create a shared identity and holistic vision for readiness. Thus, we focus on involving students and families in the decision-making processes to generate tangible statements of identity and shared vision for readiness.

In our work with partners, we strive to ensure representativeness of students and families while minimizing power differentials. Both in terms of input and participation, our partner districts must work to secure a representative group of student and family participants. Research shows certain groups of individuals are less likely to participate in group engagement sessions (e.g.,

single parents, those with diverse cultural and linguistic backgrounds). Simply sending out invitations to provide input or participate in a school-based event is not enough. We encourage schools and districts to take an equitable approach, making intentional efforts to reach those students and families they know are less likely to engage with educators and to create systems explicitly designed to ensure that dominant perspectives do not overpower the input and voice of historically marginalized groups of people. When privilege and power dynamics are not identified and managed, soliciting input can turn into a symbolic exercise rather than an authentic process that leads to a shared vision for readiness representative of the district and its community.

Approach to Stakeholder Engagement

Edulytix at Inflexion prioritizes obtaining a complete and accurate view of an organization's system and outcomes. It is important to identify target audiences and acknowledge all parties related and involved. The goal of collecting district staff, school personnel, and school community feedback is to hear the experiences, vision, values, and beliefs of all the key players in the system. There is more than one "right" way to go about collecting feedback. The most important considerations are that (a) everyone should feel the space is safe to truly express their opinions and (b) we proactively seek out voices that may be easy to overlook, not just the voices clamoring to be heard. Edulytix staff will collaborate with the strategic planning team to identify the most appropriate and relevant internal and external collaborators to include in the feedback process to best understand current and future needs to streamline plans in determining the extent of achievement goals for those plans.

Approach to Data

While data are objective, the choices we make when framing a data project are not. These decisions influence and guide each step of our project. At Inflexion, Edulytix staff bring these decisions to the forefront of our approach and systematically embed equity considerations into each step to ensure our choices are aligned with our equity goals.

Framing a Data Project. Grounded in the tenets of interactive evaluation practice, utilization-focused evaluation, and evaluation capacity building, Edulytix staff view the design of data projects as collaborative, client-centered endeavors. We value positive interdependence and cooperative goals and focus on understanding the client's information needs to build the client's ability to collect and use data for decision making (King & Stevahn, 2013; Patton, 2012; Preskill & Russ-Eft, 2005). Edulytix works with clients on what they are trying to accomplish by exploring whose perspectives and/or lived experiences are being centered, establishing common definition for key terms in our aim statement, identifying where the onus to change is being placed, clearly defining what constitutes success and whose definition of success we are using, and determining whether these decisions are in alignment with the client's equity

goals. Through these conversations, we strive to articulate unstated goals of the project, while balancing the restrictions and rewards to achieve the stated goals.

Choosing a Methodology. We believe clients' needs for useful information are more important than rigid commitments to particular methodologies. Edulytix staff subscribe to the philosophical paradigm of pragmatism, which fosters the use of mixed methods (Tashakkori & Teddlie, 2003) that best align with the questions that need to be answered. These philosophies ensure that our staff are flexible in their designs and methodology without jeopardizing the integrity of the analytic processes or results. Edulytix frequently uses a mixed-method design, leveraging the triangulation of various data sources to allow the strengths of some methods to compensate for the weaknesses of others, ultimately providing a more complete and rigorous data project (Creswell & Plano Clark, 2011).

Data Collection. Edulytix staff at Inflexion are committed to identifying the data collection solutions that are most appropriate for the client's questions and will be most sustainable for the project. When developing our data collection plans, we consider from *whom* we will collect data, *what* information we need to collect, *when* and *where* we will collect information, and *how* we will use the information we collected. When identifying from *whom* we will collect data, we strive to ensure that we have voices and perspectives that are relevant for the topic of interest. We attempt to center the lived experiences of various groups and understand how our system contributes to these lived experiences. When determining *what* information needs to be collected, we strive to collect the types of data that are best suited to answer our client's questions. This may mean collecting quantitative data, qualitative data, or mixed methods data. Additionally, when developing data protocols and instruments, we use comprehensive and inclusive language to ensure that all participants see themselves in our response sets. When planning *when* and *where* we will collect our data, we collaborate with our partners to work around district priorities and allow for the most flexibility for participants, while balancing standardization of research methods and optimization of meaningful data gathering. Finally, we appreciate the time and effort it takes to collect data, both on the part of the person collecting and analyzing the information and those who provide the information. As such, we consider *how* we will use the data that we collect and how it aligns to the questions of interest.

Data Analysis. Edulytix targets data analysis techniques that are most appropriate for the client's questions and will be most straightforward to understand. Ultimately, our data analysis techniques are guided by the question we are trying to answer, as different questions require different types of information and analyses. Additionally, we recognize that how we choose to analyze our data embeds a specific worldview. While these worldviews are often implicit, it is important to identify whose worldview is centered in the data analysis model and theory of change. We strive to make these worldviews explicit and challenge our partners to elevate equity as a driver of this choice. Further, Edulytix staff strive to understand the conditions for success by emphasizing what works for whom under what conditions. Thus, in addition to

examining data overall, we frequently disaggregate data by groups of interest, allowing us to examine how our social identities combine to create different lived experiences. We report results in multiple ways, while being transparent about the limitations, compromises, and choices that were made during the data collection and analysis processes.

Data Interpretation. Data interpretation is where we apply meaning to our results. We champion collaboration in our approach to data interpretation. We serve as the data experts explaining *what* we see, and our clients serve as the context experts adding nuance to *why* we see what we see. In our interpretation, we ensure the claims and inferences that are being made are supported by the methodology and available data. We also challenge our clients to consider the equity implications that these interpretations may have. We highlight the importance of alignment between the interpretations and the context and perspectives that were centered in the research. Further, we provide recommendations on policy, practice, and future research based on myriad types of evidence. We strive to develop actionable recommendations, balancing actions that will move the needle with what is realistic for schools and districts.

Dissemination of Results. Inflexion considers the audience and their needs when disseminating results from our work. We understand that different audiences have different information needs and preferences. We strive to balance *content* (what we include in our communication and how we choose to say it), *medium* (the form that the communication takes such as written reports, memos, infographics, visuals, videos, searchable database), and *access* (how easily and completely the audience can engage with and understand the information we are sharing). Additionally, content is created considering accessibility, including comprehension and cultural appropriateness. The medium supports the ideal accessibility of the information for each audience, including feedback and engagement. Taken together, we can create final products and communications that are appropriate and meaningful for each audience.

Appendix C: Staff CVs

JESSICA N. (GORE) JACOVIDIS

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EDUCATION

May 2017 **James Madison University, Harrisonburg, VA**
Ph.D. in Assessment and Measurement
Advisor: Christine DeMars
Doctoral Dissertation: Evaluating the Performance of Propensity Score Matching Methods: A Simulation Study

Dec. 2010 **Appalachian State University, Boone, NC**
MA in Industrial-Organizational Psychology
Graduate Certification in Human Resources Management
Advisor: Hall P. Beck
Master's Thesis: The Importance of Freshman Experiences in Predicting Students' Retention Decisions

May 2007 **University of Charleston, Charleston, WV**
BA in Psychology
AS in Business Administration
Magna cum Laude and Psychology Honors

PROFESSIONAL EXPERIENCE

2015-Present **Inflexion (formerly the Educational Policy Improvement Center [EPIC]), Eugene, OR**
Principal Researcher (2021-Present)
Research Associate (2015-2021)

- Lead business development efforts, including identifying and evaluating potential requests for proposal (RFP), connecting with potential clients and collaborators, and leading targeted marketing efforts.
- Develop research and evaluation plans in response to RFPs, including scopes of work, staffing, deliverables, and timelines.
- Develop and maintain strong working relationships with clients and funders to facilitate repeat business and referrals.
- Supervise and manage project team (e.g., administrative assistant, research assistants, research associates, and consultants) to ensure successful completion of project portfolio.
- Manage research and evaluation projects, including coordinating and implementing research and evaluation plans, securing Institutional Review Board (IRB) approval for research activities, maintaining timelines and budgets, working with staff to ensure efficient completion of tasks, and maintaining communication with clients to ensure timely and accurate completion of project activities.

- Identify existing instruments and/or design appropriate instruments (e.g., surveys, interview protocols, observation protocols, knowledge assessments) to address research and evaluation questions.
- Coordinate and execute comprehensive data collection site visits at multiple locations with multiple stakeholder groups to ensure smooth logistical arrangements and successful outcomes.
- Collected qualitative and quantitative data via surveys, interviews, focus groups, document analysis, observation, and secondary data sources (e.g., statewide achievement test scores, GPA, course enrollment and completion).
- Develop, oversee, and implement data management plans (e.g., data cleaning, scoring and recoding data, merging and concatenating files, formatting databases, and data security) to ensure the availability of useable data.
- Develop, oversee, and implement data analysis plans (e.g., descriptive and inferential statistics; thematic coding of qualitative data; and interpretation of results).
- Create and/or modify syntax files to manage, analyze, and graph data; trouble-shoot syntax errors.
- Review, provide feedback, and approve work of project team members, ensuring adherence to quality standards and project objectives.
- Ensure adherence to reporting requirements for multiple funding organizations including the Gates Foundation, National Science Foundation, US Department of Education, and US Department of Homeland Security.
- Develop formative and summative evaluation reports (e.g., text, tables, graphs), literature reviews, papers, presentations, and articles for various audiences.
- Lead the formulation of a comprehensive research and evaluation framework along with a strategic research agenda for Portico, Inflexion's schools coaching suite, to support evidence-based decision-making and continuous improvement on the product as well as evidence of impact and efficacy.

2018-2019 **Center for Assessment and Research Studies (CARS), James Madison University (JMU), Harrisonburg, VA**

Assistant Professor/Assistant Assessment Specialist (one-year appointment)

- Developed constructive and cooperative working relationships with clients across campus.
- Supervised graduate student consultants in their work with academic programs.
- Coordinated the submission, rating, and feedback of assessment reports for all academic degree and certificate programs (~120 programs).
- Co-led the renegotiation of the memorandum of understanding (MOU) between CARS and the Institutional Review Board (IRB) at JMU.
- Identified and evaluated grant opportunities for faculty and student affairs staff professional development related to assessment and learning improvement.

- Served on the JMU committee responsible for implementing the new State Council of High Education in Virginia (SCHEV) assessment reporting requirements.
- Served on the Assessment Advisory Council for Academic Affairs.
- Served as the assessment expert for the Physics Learning Improvement by Design (LID) and Ethical Reasoning in Action initiatives.
- Assisted with the development of the Quality Enhancement Plan (QEP) report required by the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC).
- Assisted with the development of the Carnegie Community Engagement Classification application.

2014-2017 **Center for Assessment and Research Studies (CARS), James Madison University (JMU), Harrisonburg, VA**

Graduate Assistant (GA)

- Developed working relationships with clients across campus.
- Conducted workshops to build client capacity to engage in student learning and development assessment.
- Consulted with clients on the design and development of assessment plans, including selecting and designing instruments, collecting assessment and implementation fidelity data, and reporting assessment results using university-approved templates.
- Co-facilitated performance assessment rater training and scoring for critical thinking and writing assessments.
- Co-coordinated data collection, data management, and analysis of large scale, university-wide assessments for general education and student affairs (assessing ~4,000 students twice a year).
- Led data management (e.g., data cleaning, scoring and/or recoding data, and merging and/or concatenating files) and analysis activities (e.g., descriptive, univariate, and multivariate statistics; reliability and item analyses).
- Interpreted assessment results and developed summary reports (e.g., text, tables, graphs) for clients.
- Presented assessment results to clients and other stakeholders, as requested.
- Led meetings with clients to interpret and make sense of the assessment results and supported clients in the use of assessment results.
- Evaluated and provided feedback on academic degree programs' assessment practices.
- Conducted job analysis and drafted job description for the CARS GA and University Health Center Assessment GA positions.

2009-2014 **McREL International (Formerly Edvantia, Inc.), Denver, CO**

Evaluation Specialist (2013-2014)
Research and Evaluation Associate (2010-2013)
Research and Evaluation Assistant I (2009-2010)

- Pursued new business opportunities, including identifying and evaluating potential request for proposal (RFP), connecting with potential clients and collaborators, and leading targeted marketing efforts.
- Developed research and evaluation plans in response to requests for proposals (RFP), including scopes of work, staffing, deliverables, and timelines.
- Managed evaluation projects, including coordinating and implementing research and evaluation plans, maintaining timelines, working with staff to ensure efficient completion of tasks, and maintaining communication with clients to ensure timely and accurate completion of evaluation activities.
- Prepared project submissions and materials for Institutional Review Board (IRB) review.
- Identified and designed appropriate instruments (e.g., surveys, interview protocols, observation protocols, knowledge assessments) to address research and evaluation questions.
- Collected qualitative and quantitative data via surveys, interviews, focus groups, document analysis, observation, and secondary data sources (e.g., statewide achievement test scores, GPA, course enrollment and completion).
- Organized and conducted site visits involving multiple sites.
- Developed and implemented data management plans (e.g., data cleaning, scoring and recoding data, combining files, and data security) and analysis plans (e.g., descriptive and inferential statistics; thematic coding of qualitative data; interpretation of results).
- Developed formative and summative evaluation reports (e.g., text, tables, graphs), literature reviews, papers, presentations, and articles for various audiences.

2009-2011 **University of Charleston, Charleston, WV**

Adjunct Professor of Psychology

- Taught sections of developmental psychology and industrial and organizational psychology.
- Prepared lectures, syllabi, assignments, and exams for classes.
- Graded class assignments and assigned overall course grades.

2008-2009 **Appalachian State University, Boone, NC**

Graduate Teaching Assistant

- Taught section of introductory psychology.
- Prepared lectures, syllabi, assignments, and exams for classes.
- Graded class assignments and assigned overall course grades.

CONSULTATION

2023-Present **Department of Physics and Astronomy at James Madison University (JMU), Harrisonburg, VA**

- Serve as an assessment specialist for a grant from JMU's University Studies Office of Online Strategies entitled *Remote Access: Redesigning College Physics Laboratory as a Hands-On Online Lab to Enhance Accessibility and Equity*.
- Advise on and oversee the development of an assessment plan, including reviewing student learning outcomes, developing research questions, determining the sample, and designing data collection methodology.
- Lead the development of the assessment tool (performance assessment prompt and rubric), refinement of the tool, and validation of the tool.
- Advise on the analysis plan and serve as thought partner on the interpretation of results.

2022-Present **Territorium, San Antonio, TX**

- Serve as the psychometric consultant on ETS's HEIghten assessment suite, ETS's Electronic Proficient Profile (EPP), and other licensed assessments as requested.
- Review and verify form rotation, assessment scoring, score calculations and conversions, percentile calculations, and proficiency classifications to ensure all data are accurate for forms of all assessments.
- Provide guidance and oversight on the conversion and refinement of institutional score reports and learner reports.
- Work with product developers and programmers to address any issues uncovered during reviews.
- Provide guidance on communications with customers regarding scoring issues, assessment enhancements, and reporting revisions.
- Lead workshops on assessment topics of interest to customers (e.g., examinee motivation, understanding the score report, etc.).

2019-2020 **Educational Testing Service (ETS), Princeton, NJ**

- Developed and conducted customized assessment workshops designed to build capacity on general assessment topics and use of the Major Field Test (MFT) and HEIghten Outcomes Assessment Suite.
- Developed and hosted webinars online webinars on general assessment topics, like student motivation in low-stakes testing.
- Developed support materials (e.g., frequently asked questions, tip sheets, and infographics) to accompany webinars.

2018 **FurstPerson, Inc., Chicago, IL**

- Provided guidance on revisions to current adaptive test item selection procedures, item exposure criteria, and stopping rules, while adhering to professional standards and guidelines.

- Conducted statistical analyses using classical test theory and item response theory to make informed recommendations to improve assessments (simulations, adaptive, and static tests).
- Conducted cultural calibration to ensure assessments were invariant across populations/languages.

2017 **Office of Environmental Stewardship and Sustainability at James Madison University (JMU), Harrisonburg, VA**

- Served as an assessment consultant focused on assessing sustainability culture to meet the requirements of the Association for the Advancement of Sustainability in Higher Education's (AASHE).
- Reviewed and provided guidance on the refinement of the Sustainability Culture Survey and provided recommendations for future research directions.
- Led data management and analysis (e.g., descriptive and inferential statistics; factor analysis; and thematic coding of qualitative data).
- Led the development of the Environmental Engagement Scale to be added to the Sustainability Culture Survey.
- Developed assessment reports, articles, and presentations (e.g., text, tables, graphs) for various audiences.

2017 **Center for Assessment and Research Studies (CARS) at James Madison University (JMU), Harrisonburg, VA**

- Analyzed assessment data and wrote end-of-year assessments reports.
- Assisted with writing and critical thinking performance assessment rating sessions.
- Co-led two one-week assessment-related workshop series with JMU faculty and student affairs staff.

2016 **Brain Hess Consulting, Minneapolis-St. Paul, MN**

- Conducted G-Study in EDUG.
- Created step-by-step documentation for using EDUG.

2015 **Educational Policy Improvement Center, Eugene, OR**

- Assisted with evaluation proposals.
- Conducted quantitative and qualitative data analysis.
- Assisted with method and results sections of evaluation reports.

2015 **McREL International, Charleston, WV**

- Conducted quantitative and qualitative data analysis.
- Wrote summative evaluation report for RESA 1 TEAM MSP evaluation project.

2011-2012 **Independent Consultant, Charleston, WV**

- Assisted with the development of data collection instruments.
- Provided feedback on appropriate analyses to address research questions.
- Conducted statistical significance tests in SPSS.
- Reviewed results section of manuscripts.

RELEVANT COURSEWORK

Assessment Coursework

- Assessment Consultation
- Assessment Methodology & Instrument Design
- Assessment Policy
- Performance Assessment

Research Methods, Statistics, and Measurement Coursework

- Social science research methods
- Mixed methods
- Qualitative inquiry
- Measurement theory
- Classical Test Theory
- Generalizability Theory
- Computer assisted data management
- Intermediate statistics
- Multivariate statistics
- Hierarchical Linear Modeling (HLM)
- Structural Equation Modeling (SEM)
- Advanced SEM
- Item Response Theory (IRT)
- Advanced IRT
- Bayesian Inference
- Statistical Consultation

Industrial/Organizational Psychology Coursework

- Advanced organizational psychology
- Labor relations
- Organizational development
- Performance management
- Staffing
- Strategic human resource management
- Training and development

Software and Technology

- Productive Tools (e.g., Microsoft Office Suite, Google Workspace)
- Project Management Tools (e.g., Asana, Shortcut, Jira)
- Statistical Data Analysis Software (e.g., SPSS SAS, R)
- Specialized Analysis Software (e.g., LISREL, Mplus, flexMIRT, HLM)
- Qualitative Data Analysis Software (NVivo, Dedoose)
- Survey Administration Platforms (e.g., Qualtrics, SurveyMonkey, Survey Anyplace)
- AI and Machine Learning (e.g., OpenAI's Chat GPT, Google's Vertex AI)

PROFESSIONAL DEVELOPMENT ACTIVITIES

2022 *Feedback is Fuel,* online course provided by Udemy Business.

2022 *Leading Effective Meetings,* online course provided by Udemy Business.

2022 *Better Virtual Meetings: How to Lead Effective Meetings,* online course provided by Udemy Business.

2022 *Effective Delegations for New Managers,* online course provided by Udemy Business.

2021 *Data Equity Bootcamp,* workshop provided by We All Count.

2021 *Evidence for Improvement,* workshop provided by The Carnegie Foundation.

2021 *Growing Your Measurement Tree: How to Increase the Impact of Your NSI Through Coherent Measures*, workshop provided at the Network of School Improvement Community of Practice May Convening, Bill and Melinda Gates Foundation.

2021 *Supporting Productive Inquiry that Leads to Powerful Learning,* workshop provided at the Network of School Improvement Community of Practice May Convening, Bill and Melinda Gates Foundation.

2021 *Measuring Leader Proficiency and Organizational Capacity for Continuous Improvement*, workshop provided at the Carnegie Summit.

2021 *A System of Measures Supporting Improvement in Teacher Preparation,* workshop provided at the Carnegie Summit.

2021 *On Track for Success: Leveraging Data and Improvement to Transform 9th-Grade Trajectories,* workshop provided at the Carnegie Summit.

2021 *Empathy Interviews: How to Do Them and Why They're Important,* workshop provided at the Carnegie Summit.

2021 *Coaching for Improvement: Navigating Common Coaching Dilemmas,* workshop provided at the Carnegie Summit.

2021 *The Everyday PDSA: Engaging Teachers to Address Complex Problems,* workshop provided at the Carnegie Summit.

2021 *Introduction to Improvement Science: A Learning-By-Doing Simulation,* workshop provided at the Carnegie Summit.

2021 *The Art of Coaching Teams*, workshop led by Bright Morning and High Tech High Graduate School of Education.

2021 *Continuous Improvement 101,* High Tech High Graduate School of Education.

2020 *What Works Clearinghouse (WWC) Effect Size and Standard Error Formulas,* What Works Clearinghouse.

2020 *Diversity @ Work: Managing an Inclusive Workforce,* United Way of Harrisonburg and Rockingham County.

2020 *Leveraging Teacher Voice to Promote Teachers' Social and Emotional Learning.*

2020 *Asana Advanced Webinar.*

2020 *Asana Basics Webinar.*

2019 *SAS Programs for Data Mining and Machine Learning,* workshop led by Tom Grant, James Madison University.

2019 *Project Management Certification*, certificate program led by David Hylton, PMP, James Madison University.

2017 *A Gentle Introduction to Multiple Imputation*, workshop led by Dr. Craig Enders, James Madison University.

2016 *Simulations in Psychometrics: An Introductory Workshop*, workshop led by Kelly Foelber, James Madison University.

2015 *Using Mixed Methods to Tell the Whole Story*, workshop led by Dr. Felice Billups and Dr. Robert Gable, Northeastern Educational Research Association (NERA).

2015 *An Introduction to Structural Equation Modeling*, workshop led by Dr. Sara Finney and Kelly Foelber, James Madison University.

2014 *Hierarchical Linear Modeling (HLM)*, workshop led by Dr. Michael Chajewski, Northeastern Educational Research Association (NERA).

2014 *A Hands-On Introduction to R*, workshop led by Dr. Monica Erbacher and Matthew Swain, Northeastern Educational Research Association (NERA).

2012 *Charlotte Danielson's Framework for Teaching Certification,* certification training program, The Danielson Group.

2012 *Using Theories and Frameworks of Evaluation Practice to Inform and Improve our Work,* eStudy led by Dr. Christina Christie, American Evaluation Association.

2010 *Graphics in R*, online course led by Dr. Paul Murrell, Statistics.com.

2010 *Statistical Analysis Using R*, online course led by Dr. John Verzani, Statistics.com.

2010 *Introduction to R*, online course led by Dr. Paul Murrell, Statistics.com.

PROFESSIONAL SERVICE

2022-Present *Board Member,* Staunton Montessori School, Fishersville, VA.

2022-Present *Board Member and Program Committee Chair,* Boys and Girls Club of Harrisonburg and Rockingham County.

2022-Present *Leadership Team,* Rocktown Rotary Club.
Speaker and Service Committee Chair (2023-Present).

2022 *Grant Reviewer*, Education Innovation and Research (EIR) Early Phase grant proposals, US Department of Education.

2020-2021 *Participant,* Leadership Harrisonburg-Rockingham County, Harrisonburg Rockingham Chamber of Commerce.

2020 *Participant,* Emerging Leaders Program, United Way of Harrisonburg and Rockingham County.

2019-Present *Executive Leadership Team,* Valley Business Keynote.
Co-chair (2021-2023).

2019 *Grant Reviewer*, Community Impact Team, Asset Limited, Income Constrained, Employed (ALICE) proposals, United Way of Harrisonburg and Rockingham County.

2018 *Scholarship Reviewer,* Friends of the University Scholarship Review, Appalachian State University, Boone, NC.

2017-2023 *Institutional Review Board Member*, University of Charleston, Charleston, WV.

2016 *Session Chair*, Item Response Theory (IRT) Session, International Meeting of the Psychometric Society (IMPS).

2016 *Grant Reviewer*, Community Impact Team, Housing and Homelessness proposals, United Way of Harrisonburg and Rockingham County.

HONORS AND AWARDS

2015 1st Place: AERA Division H (Research, Evaluation, and Assessment in Schools) Outstanding Publications Competition (Educational Program Evaluation Category), *West Virginia Gaining Early Awareness and Readiness for Undergraduate Programs (GEAR UP) Year 6 Evaluation Summary: Overall Evaluation Summary from 2008-2014.*

2010 1st Place: AERA Division H (Research, Evaluation, and Assessment in Schools) Outstanding Publications Competition (Educational Program Evaluation Category), *Project TEACH II: The Constitution in historical context: Year 3 evaluation and summative conclusions.*

SELECTED PRESENTATIONS, INVITED WORKSHOPS, AND PUBLICATIONS

Presentations

Sturm, D., Hartman, C. J. B., Alexander, R., & **Jacovidis, J. N.** (2019, March). *Divergent conceptualizations of sustainability: Considerations for instrument design.* Paper presented at the 2019 Symposium on Sustainability Reporting in Higher Education, Edinburgh, Scotland.

Alexander, R., Hartman, C. J. B., Sturm, D., & **Jacovidis, J. N.** (2017, October). *Development of a sustainability culture assessment to inform planning.* Paper presented at the 2017 Association for the Advancement of Sustainability in Higher Education Annual Conference, San Antonio, TX.

Jacovidis, J. N. & Ames, A. J. (2016, July). *Hyperpriors for item response theory (IRT) models.* Poster presented at the 2016 International Meeting of the Psychometric Society, Ashville, NC.

DeMars, C. & **Jacovidis, J. N.** (2016, April). *Multilevel IRT: When is local independence violated?* Electronic Poster presented at 2016 National Council on Measurement in Education Annual Meeting, Washington DC.

Jacovidis, J. N., Foelber, K. J., & Horst, S. J. (2015, October). *Match me if you can: Strategies for finding a match using propensity score techniques.* Paper presented at 2015 Northeastern Educational Research Association Annual Conference, Trumbull, CT.

Schubert, C., Baller, S., Ott Walter, K., Sapp, L., Swanson, M., & **Jacovidis, J. N.** (2015, March). *Developing a health sciences information literacy assessment for undergraduates*. Poster presented at 2015 Association of College and Research Libraries conference, Portland, OR.

Sundre, D., Clarke, K., Swanson, M., **Jacovidis, J. N.** & Strickman, S. (2014, November). *Information Literacy Assessment: A Case Study in Collaboration*. Presented at the Virginia Assessment Group Conference, Norfolk, VA.

Gore, J. N., Houston, T., Oster, A., Dobbins, E., Thompson, A., Beck, H. P., & Davidson, W. B. (2010, March). *The importance of freshman experiences in determining students' retention decisions.*

Paper presented at the meeting of the Southeastern Psychological Association, Chattanooga, TN.

Kennedy, D. T., Beck, H. P., **Gore, J. N.,** Dudley, A. L., Whisnant, K. R., & Boles, A. S. (2009, February). *The effects of three forms of feedback on automation disuse*. Paper presented at the meeting of the Southeastern Psychological Association, New Orleans, LA.

Milligan, M., Beck, H. P., Davidson, W. B., **Gore, J. N.**, & High, K. V. (2008, May). *Factor analysis of the College Persistence Questionnaire.* Paper presented at the meeting of the Association for Psychological Science, Chicago, IL.

Beck, H. P., Davidson, W. B., Milligan, M., **Gore, J. N.**, Helden, L. C., & Vance, R. A. (2008, March). *Factor analysis of the College Persistence Questionnaire.* Paper presented at the meeting of the Southeastern Psychological Association, Charlotte, NC.

Gore, J. N., Davidson, W. B., Milligan, M., Beck, H. P., & Surber, M. (2008, March). *College Persistence Questionnaire identifies freshmen unlikely to return as sophomores.* Poster presented at the Annual Conference of the Southeastern Psychological Association, Charlotte, NC.

Beck, H. P., **Gore, J. N.**, Geisinger, K. M., Rosen, B. R., & Banford, A. R. (2007, October). *Highly grade-oriented undergraduates fail to obtain good marks.* Paper presented at the meeting of the Northeast Conference for Teaching Psychology, Danbury, CT.

Invited Workshops

Jacovidis, J. N. & MacKrell, C. (2019, December). *How to align student learning objectives and assessments.* Invited workshop presented to the Department of Biology, East Tennessee State University, Johnson City, TN.

Jacovidis, J. N. & Sanders, C. (2019, October). *Student motivation: Common misconceptions and methods for improvement.* Invited webinar, Educational Testing Services (ETS), Princeton, NJ.

Jacovidis, J. N. (2019, August). *Developing student learning objectives: An introductory workshop.* Invited workshop presented at the Department of Chemistry's Annual Faculty Retreat, Middle Tennessee State University, Murfreesboro, TN.

Holzman, M. A. & **Jacovidis, J. N.** (2017, June). *Assessment Bootcamp.* Invited workshop series presented at James Madison University's Center for Assessment and Research Studies (CARS) Annual Assessment Bootcamp, Harrisonburg, VA.

Provided workshops on articulating program theory, the assessment cycle, writing learning objectives, mapping programming to learning objectives, finding and designing instruments, writing multiple choice items, developing performance assessments and rubrics, developing attitudinal and noncognitive measures, collecting and analyzing data, and reporting and using assessment results.

Jacovidis, J. N. (2017, March). *Multiple group latent growth models.* Invited lecture presented in Advanced Structural Equation Modeling, James Madison University, Harrisonburg, VA.

Jacovidis, J. N. (2017, January). *Introduction to the assessment cycle.* Invited workshop presented the University Health Center's Health and Wellness Staff Retreat, Harrisonburg, VA.

Jacovidis, J. N. & Ward, L. (2016, November). *Introduction to the assessment cycle.* Invited workshop presented at the University Health Center's Leadership Meeting, Harrisonburg, VA.

Harris, H., Horst, S. J., & **Jacovidis, J. N.** (2016, October). *Propensity score analysis.* Invited pre-conference workshop presented at the Northeastern Educational Research Association Annual Meeting, Trumbull, CT.

Jacovidis, J. N & Holzman, M. A. (2016, June). *Assessment Bootcamp.* Invited workshop series presented at James Madison University's Center for Assessment and Research Studies (CARS) Annual Assessment Bootcamp, Harrisonburg, VA.

Provided workshops on articulating program theory, the assessment cycle, writing learning objectives, mapping programming to learning objectives, finding and designing instruments, writing multiple choice items, developing performance assessments and rubrics, developing attitudinal and noncognitive measures, collecting and analyzing data, and reporting and using assessment results.

Jacovidis, J. N. (2016, March). *Multilevel item response theory.* Invited lecture presented in Advanced Item Response Theory, James Madison University, Harrisonburg, VA.

Publications

Alexander, R., **Jacovidis, J. N.**, & Sturm, D. (2022). Exploring personal definitions of sustainability and their impact on perceptions of sustainability culture. *International Journal of Sustainability in Higher Education, 23,* 686-702.

Pastor, D. A., Foelber, K. J., **Jacovidis, J. N.,** Fulcher, K. H., Sauder, D. C., & Love, P. D. (2019). University-wide assessment days: The James Madison University Model. *The Association for Institutional Research (AIR) Professional File, Article 144,* 1-13. Retrieved from the Association for Institutional Research (AIR) website: https://www.airweb.org/collaborate-learn/reports-publications/professional-file

Horst, S. J. & **Jacovidis, J. N.** (2018). Locus of control. In B. B. Frey (Ed.), *The SAGE Encyclopedia of Educational Research, Measurement, and Evaluation.* (p. 989) Thousand Oaks, CA: SAGE.

Jacovidis, J. N., Foelber, K. J., & Horst, S. J. (2017). The effect of propensity score matching method on the quantity and quality of matches. *The Journal of Experimental Education, 4,* 535-558.

Sauder, D. C., Foelber, K. J., **Jacovidis, J. N.,** & Pastor, D, A. (2016, July). Utilizing technology in data collection. *Intersection,* The newsletter of the Association for the Assessment of Learning in Higher Education (AALHE), 7-9. (*Note: This is a newsletter that is reviewed by the editor and is not blind peer-reviewed.)*

Jacovidis, J. N., Clarke, K., Hazard, G., & Horst, S. J. (2016, April). Not my bunnies and not my hat. *Intersection,* The newsletter of the Association for the Assessment of Learning in Higher Education (AALHE), 8-11. (*Note: This is a newsletter that is reviewed by the editor and is not blind peer-reviewed.)*

Non-Refereed Technical Reports

Jacovidis, J. N., Bousselot, T. E., Chadwick, K. L., & Manlove S. (2023). *Diversity, equity, access, and inclusions (DEAI) in the International Baccalaureate (IB) Middle Years Programme (MYP): Exploring perspectives on programme and curriculum requirements.* Eugene, OR: Inflexion.

Jacovidis, J. N., Bousselot, T. E., & Chadwick, K. L. (2023). *Innovative teaching and learning during COVID-19: An exploratory study of teachers and IB communities final report.* Eugene, OR: Inflexion.

Jacovidis, J. N., Bousselot, T. E., & Schuhe, G. E. (2023). *Building toward computer science equity and inclusions: Developing an ecosystem of supports. 2022 Implementation Evaluation Report.* Eugene, OR: Inflexion.

Jacovidis, J. N. (2022). *Delivering integrated curricula and course pathways through makerspace and esports: Summative evaluation report.* Eugene, OR: Inflexion.

Jacovidis, J. N., Todd, J., Chadwick, K. L., Anderson, R. & Beach, P. (2021). *Metacognitive skills in the IB curricula.* Eugene, OR: Inflexion.

Jacovidis, J. N., Chadwick, K. L., & Beach, P. (2021). *Exploring the practices for and effects of open book assessments.* Eugene, OR: Inflexion.

Jacovidis, J. N., & Chadwick, K. L. (2021). *Pre-AP implementation in virtual and hybrid environments: Phase 2 Report.* Eugene, OR: Inflexion.

Jacovidis, J. N., & Chadwick, K. L. (2021). *Examining high-quality Pre-AP implementation at pilot sites: Updated Phase 1 report.* Eugene, OR: Inflexion.

Beach, P. T., Anderson, R. C., **Jacovidis, J. N.,** & Chadwick, K. L. (2021). *Making the abstract explicit: The role of metacognition in teaching and learning.* Eugene, OR: Inflexion. Available at https://www.ibo.org/research/policy-research/metacognition/

Anderson, R. C., Beach, P. T., **Jacovidis, J. N.,** & Chadwick, K. L. (2020). *Academic buoyancy and resilience for diverse students around the world.* Eugene, OR: Inflexion. Available at https://www.ibo.org/research/policy-research/academic-buoyancy-and-resilience-for-diverse students-around-the-world-2020/

Jacovidis, J. N., Anderson, R. C., Beach, P. T., & Chadwick, K. L. (2020). *Growth mindset thinking and beliefs in teaching and learning.* Eugene, OR: Inflexion. Available at https://www.ibo.org/research/policy research/growth-mindset/

Jacovidis, J. N., Chadwick, K. L., & Beach, P. (2020). *Creating a more sophisticated AVID coaching and certification instrument (CCI) and certification process: Final report.* Eugene, OR: Inflexion.

Jacovidis, J. N., Beach, P., & Chadwick, K. L. (2019). *Creating a more sophisticated AVID coaching and certification instrument (CCI) and certification process: Interim report.* Eugene, OR: Inflexion.

Chadwick, K. L., Bousselot, T., Beach, P., Todd, J., & **Jacovidis, J. N.** (2019). *Exploring the implementation and effects of high-quality AVID schoolwide.* Eugene, OR: Inflexion.

Au, C., & **Jacovidis, J. N.** (2019). *An item and distractor analysis of the ethical reasoning identification test (ERIT).* Harrisonburg, VA: James Madison University.

Todd, J., **Jacovidis, J. N.**, Beach, P., Chadwick, K. L., & Bousselot, T. (2019). *AVID positive deviance interim report: Exploring the effects of high quality AVID schoolwide implementation.* Eugene, OR: Inflexion.

Au, C., & **Jacovidis, J. N.** (2018). Ethical reasoning in action 2017-2018 supplemental assessment report. Harrisonburg, VA: James Madison University.

Au, C., **Jacovidis, J. N.**, Ames, A., & Holzman, M. (2018). Ethical reasoning in action 2017-2018 assessment report. Harrisonburg, VA: James Madison University.

Bousselot, T., **Jacovidis, J. N.**, & Chadwick, K. L. (2018). *College and career readiness program AVID implementation report: Year 3 summary.* Eugene, OR: Inflexion.

Jacovidis, J. N., Chadwick, K. L., Fukuda, E. Todd, J., & Thier, M. (2018). *Study of International Baccalaureate Diploma Programme and Career-Related Programme school readiness for and perceptions of on-screen examinations.* Eugene, OR: Inflexion, Inc.

Bousselot, T., **Jacovidis, J. N.**, & Chadwick, K. L. (2017). *College and career readiness program AVID implementation report: Year 2 summary.* Eugene, OR: Educational Policy Improvement Center.

Jacovidis, J. N., Chadwick, K. L., Fukuda, E. Todd, J., & Thier, M. (2017). *International Baccalaureate Diploma Programme and Career-Related Programme on-screen assessments: Interim report.* Eugene, OR: Educational Policy Improvement Center.

Jacovidis, J. N. (2017). *Culture of sustainability survey results.* Harrisonburg, VA: James Madison University.

Jacovidis, J. N. & Horst, S. J. (2017). *Madison research essential skills test (MREST) assessment report.* Harrisonburg, VA: James Madison University.

Jacovidis, J. N. & Horst, S. J. (2017). *Attitudes towards communication (ATC) assessment report*. Harrisonburg, VA: James Madison University.

Jacovidis, J. N. & Horst, S. J. (2017). *Human communication assessment report.* Harrisonburg, VA: James Madison University.

Todd, J., **Jacovidis, J.N.,** Kim, M., Chadwick, K., Liebhardt, M., & Stout, O. (2017). *Merced Union High School District Advanced Placement® Program Analysis Summary.* Eugene, OR: Educational Policy Improvement Center.

Todd, J., **Jacovidis, J. N.,** Kim, M., Liebhardt, M., & Chadwick, K. L. (2017). *Merced advanced placement SWOT analysis summary.* Eugene, OR: Educational Policy Improvement Center.

Bousselot, T., **Jacovidis, J. N.**, & Chadwick, K. L. (2016). *College and career readiness program AVID implementation report: Year 1 summary.* Eugene, OR: Educational Policy Improvement Center.

Jacovidis, J. N. & Chadwick, K. L. (2016). *Career ConnectED survey interpretation guide.* Eugene, OR: Educational Policy Improvement Center.

Chadwick, K. L., Bousselot, T., Pitts, C., & **Jacovidis, J. N.** (2016). *Eugene 4J school district: Scheduling for success final report.* Eugene, OR: Educational Policy Improvement Center.

Thier, M., Fukuda, E., **Jacovidis, J. N.,** Chadwick, K. L., & Todd, J. (2016). *Review of the International Baccalaureate programme standards and practices.* Eugene, OR: Educational Policy Improvement Center.

Jacovidis, J. N. (2016). *A comparison of frequentist and Bayesian approaches to predicting undergraduate retention.* Harrisonburg, VA: James Madison University.

Jacovidis, J. N. (2016). *Predicting the variability in institutional commitment across universities: An applied example of multilevel item response theory (IRT).* Harrisonburg, VA: James Madison University.

Jacovidis, J. N. (2016). *An application of generalizability theory to the Cluster One writing assessment.* Harrisonburg, VA: James Madison University.

Jacovidis, J. N. (2016). *Job analysis for certification and licensure exams: Practical guidance from industrial/organizational psychology.* Harrisonburg, VA: James Madison University.

Jacovidis, J. N. & Horst, S. J. (2016). *Madison research essential skills test (MREST) assessment report.* Harrisonburg, VA: James Madison University.

Jacovidis, J. N. & Horst, S. J. (2016). *Attitudes towards communication (ATC) assessment report*. Harrisonburg, VA: James Madison University.

Jacovidis, J. N. & Horst, S. J. (2016). *Human communication assessment report.* Harrisonburg, VA: James Madison University.

Jacovidis, J. N. & Horst, S. J. (2016). *Oral communication assessment report.* Harrisonburg, VA: James Madison University.

Jacovidis, J. N. & Horst, S. J. (2016). *Information literacy (InfoCore) assessment report.* Harrisonburg, VA: James Madison University.

Jacovidis, J. N. (2015). *Evaluating the internal structure of the college persistence questionnaire: A confirmatory factor analytic approach.* Harrisonburg, VA: James Madison University.

Jacovidis, J. N. (2015). *An application of item response theory to an information literacy assessment.* Harrisonburg, VA: James Madison University.

Jacovidis, J. N. (2015). *What does not applicable really mean? An application of the nominal response model to the college persistence questionnaire.* Harrisonburg, VA: James Madison University.

Jacovidis, J. N. (2015). *Qualitative and quantitative approaches for establishing content validity.* Harrisonburg, VA: James Madison University.

Jacovidis, J. N. & Horst, S. J. (2015). *Attitudes towards communication assessment report*. Harrisonburg, VA: James Madison University.

Jacovidis, J. N. & Horst, S. J. (2015). *Human communication assessment report.* Harrisonburg, VA: James Madison University.

Jacovidis, J. N. & Horst, S. J. (2015). *Information literacy (InfoCore) item analysis.* Harrisonburg, VA: James Madison University.

Jacovidis, J. N. & Horst, S. J. (2015). *Critical thinking assessment report.* Harrisonburg, VA: James Madison University.

Jacovidis, J. N. (2015). *The R project informational packet.* Harrisonburg, VA: James Madison University.

Jacovidis, J. N. (2015). *A report on James Madison University's student engagement initiatives.* Harrisonburg, VA: James Madison University.

Foelber, K. J. & **Jacovidis, J. N.** (2015). *An evaluation of the Center for Assessment and Research Studies (CARS) graduate assistantship institute (GAI).* Harrisonburg, VA: James Madison University.

Jacovidis, J. N. (2015). *The relationship between institutional commitment and academic integration across institutions.* Harrisonburg, VA: James Madison University.

Jacovidis, J. N., Saunders, C. B., & Strickman, S. (2015). *Reliability and validity of the college persistence questionnaire (CPQ) version 3.* Harrisonburg, VA: James Madison University.

Jacovidis, J. N. (2015). *An assessment of undergraduate psychology students' information literacy.* Harrisonburg, VA: James Madison University.

Jacovidis, J. N. & Strickman, S. (2015). *An assessment of undergraduate social work students' information literacy.* Harrisonburg, VA: James Madison University.

Jacovidis, J. N. & Swanson, M. (2015). *An assessment of undergraduate health studies students' information literacy.* Harrisonburg, VA: James Madison University.

Hughes-Webb, G. K., Bumgardner, K., Ho, H. Y., **Jacovidis, J. N.**, Lane, J. T., & Knoster, K. C. (2015). *West Virginia GEAR UP (Gaining Early Awareness and Readiness for Undergraduate Programs) Year 6 Evaluation: Overall Evaluation Summary from 2008-2014.* Charleston, WV: McREL International.

Jacovidis, J. N. & Good, K. (2015). *West Virginia Regional Education Service Agency (RESA) 1 Teaching to Enhance Achievement in Mathematic (TEAM) Math and Science Partnership (MSP) project – Year 3 evaluation report.* Charleston, WV: McREL International.

Jacovidis, J. N., Stone, Z., & Good, K. (2014). *Florida and the Islands Comprehensive Center (FLICC) Year 2 evaluation report*. Charleston, WV: McREL International.

Good, K., & **Jacovidis, J. N.** (2014). *Dynamic Learning Maps year 4 evaluation report.* Charleston, WV: McREL International.

Jacovidis, J. N., & Bumgardner, K. (2014*). Pathways through American History TAH project summative evaluation report.* Charleston, WV: McREL International.

Jacovidis, J. N., & Bumgardner, K. (2014). *Pathways through American History TAH project Year 4 evaluation data summary*. Charleston, WV: McREL International.

Jacovidis, J. N. & Hughes-Webb, G. K. (2014). *West Virginia Regional Education Service Agency (RESA) 1 Teaching to Enhance Achievement in Mathematic (TEAM) Math and Science Partnership (MSP) project – Year 2 evaluation data summary.* Charleston, WV: McREL International.

Jacovidis, J. N., Stone, Z., & Good, K. (2013). *Florida and the Islands Comprehensive Center (FLICC) Year 1 evaluation report.* Charleston, WV: McREL International.

Fryman, M., Good, K., & **Gore, J. N.** (2013). *Dynamic Learning Maps year 3 evaluation report.* Charleston, WV: Edvantia, Inc.

Gore, J. N., & Hughes-Webb, G. K. (2013). *Pathways through American History TAH project Year 3 evaluation data summary.* Charleston, WV: Edvantia, Inc.

Gore, J.N., Stone, Z., & Hughes-Webb, G. K. (2013). *West Virginia Regional Education Service Agency (RESA) 1 Teaching to Enhance Achievement in Mathematic (TEAM) Math and Science Partnership (MSP) project – Year 1 evaluation data summary.* Charleston, WV: Edvantia, Inc.

Ho, H. Y., **Gore, J. N.,** Chadwick, K. L. (2013). *Globaloria replication study: An examination of the relationships between Globaloria participation and student achievement in year 5 of the West Virginia pilot implementation.* Charleston, WV: Edvantia, Inc.

Gore, J.N., Stone, Z., & Good, K. (2012) *Florida and the Islands Comprehensive Center (FLICC) Evaluation of FLICC: 2011-2012*. Charleston, WV: Edvantia, Inc.

Chadwick, K. L., Stone, Z. **Gore, J. N.** (2012). *Texas BRIDGE Readiness assessment.* Charleston, WV: Edvantia, Inc.

Ho, H. Y., **Gore, J. N.,** Chadwick, K. L. (2012). *Globaloria replication study: An examination of the relationships between Globaloria participation and student achievement in year 4 of the West Virginia pilot implementation.* Charleston, WV: Edvantia, Inc.

Ho, H.Y., **Gore, J. N.**, Fryman, M., & Chadwick, K. L. (2012). *An evaluation of the pilot year of the National Science Teachers Association's (NSTA's) America's Home Energy Education Competition (AHEEC) project.* Charleston, WV: Edvantia, Inc.

Gore, J. N., & Hughes-Webb, G. K. (2012). *Pathways through American History TAH project Year 2 evaluation data summary.* Charleston, WV: Edvantia, Inc.

Chadwick, K. L., & **Gore, J. N.** (2011). *Globaloria replication study: Examining the robustness of relationships between Globaloria participation and student achievement.* Charleston, WV: Edvantia, Inc.

Chadwick, K., & **Gore, J. N.** (2011). *Spatial Intelligence and Learning Center (SILC) year 5 evaluation.* Charleston, WV: Edvantia, Inc.

Chadwick, K. L., Samanta, D., & **Gore, J. N.** (2011). *The National Science Teachers Association's Integrating NASA Digital Educational Assets (IDEA) project: Year 2 summative evaluation report.* Charleston, WV: Edvantia, Inc.

Gore, J. N., & Hughes-Webb, G. K. (2011). *Pathways through American History TAH project Year 1 evaluation data summary.* Charleston, WV: Edvantia, Inc.

Gore, J. N., & Hughes-Webb, G. K. (2011). *West Virginia GEAR UP evaluation: Year 3 School Personnel Survey: Summary of results.* Charleston, WV: Edvantia, Inc.

Gore, J. N., & Hughes-Webb, G. K. (2011). *West Virginia Parent Connections (WVPC) cross year analysis.* Charleston, WV: Edvantia, Inc.

Hughes-Webb, G. K., **Gore, J. N.**, & Finch, N. L. (2011). *West Virginia GEAR UP evaluation: 2010-2011: Evaluation summary.* Charleston, WV: Edvantia, Inc.

Chadwick, K. L., & **Gore, J. N.** (2010). *Globaloria pilot study: The relationship between Globaloria participation and student achievement.* Charleston, WV: Edvantia, Inc.

Chadwick, K., **Gore, J. N.,** & Samanta, D. (2010). *The National Science Teachers Association's Integrating NASA Digital Educational Assets (IDEA) project: Year 1 implementation evaluation report.* Charleston, WV: Edvantia, Inc.

Chadwick, K., Provyn, J., & **Gore, J. N.** (2010). *The Science of Learning Center on Visual Language and Visual Learning (VL²) year 4 evaluation.* Charleston, WV: Edvantia, Inc.

Chadwick, K., Provyn, J., & **Gore, J. N.** (2010). *Spatial Intelligence and Learning Center (SILC) year 4 evaluation.* Charleston, WV: Edvantia, Inc.

Gore, J. N., & Chadwick, K. L. (2010). *ClassLink Inquiry: Exploratory analyses phase I.* Charleston, WV: Edvantia, Inc.

Hughes-Webb, G. K., **Gore, J. N.**, & Voelkel, S. (2010). *Digispired: Exploring game design final evaluation report.* Charleston, WV: Edvantia, Inc.

O'Connor, C. L., Chadwick, K. L., Samanta, D., **Gore, J. N.** (2010). *Report on outcomes from the study of a SciPack deployment in the Houston Independent School District during school year 2009-2010.* Charleston, WV: Edvantia, Inc.

Gore, J. N., O'Connor, C., & Chadwick, K. (2009). *A study on health education and teen perinatal outcomes to meet the requirements of HCR 53.* Charleston, WV: Edvantia, Inc.

Voelkel, S., Hughes-Webb, G. K., **Gore, J. N.**, & Sheffield, C. (2009). *Project TEACH II: The Constitution in historical context Year 3 evaluation and summative conclusions.* Charleston, WV: Edvantia, Inc.

Rachel Phillips, SHRM-CP

PROFESSIONAL SUMMARY

Experienced, results-driven project manager adept at leading strategic initiatives and coordinating complex education-based projects to achieve programmatic and organizational objectives. Proven track record in collaborating with diverse stakeholders, leading people ops, implementing comprehensive project plans, and driving continuous improvement efforts.

PROFESSIONAL EXPERIENCE

Project Manager, School Partnerships March 2020 – Present
Inflexion

- Manage a diverse portfolio of K-12 education projects and grants by defining project scope, objectives, deliverables, leading risk management strategies, allocating resources effectively, monitoring progress, creating status reports, and effectively communicating with project stakeholders.
- Lead a team of 26 executive coaches to consistently deliver top-tier professional development services to school and district administrators, ensuring alignment with strategic program goals.
- Collaborate with executive leadership and cross-functional teams achieve seamless alignment between program objectives and overall organizational goals.
- Design and implement comprehensive recruitment, hiring, onboarding, training, evaluation, and retention processes and materials for executive coaching program.
- Manage relationships with 50+ clients and vendors annually, efficiently handling contract creation and negotiation to ensure mutually beneficial partnerships.
- Formulate and track project engagement metrics, gather feedback from all stakeholders, and drive continuous improvement initiatives rooted in data-driven insights to optimize project effectiveness.

Special Projects Manager, Executive Assistant to the CEO July 2016 – March 2020
Inflexion

- Led high-impact initiatives for the office of the CEO ensuring fidelity to the organization's mission, strategic vision, and overarching goals.
- Provided holistic project management including collaborating with cross-functional teams, defining scopes and deliverables, allocating resources, and guiding multiple projects from concept to deployment.
- Cultivated partnerships with prospective clients; crafted business proposals and wrote grant applications spanning a range of $10,000 to $2 million in scope.
- Effectively oversaw administrative duties supporting the CEO to ensure strategic follow-through, improve communication channels, and enhance overall operational efficiency across the organization.
- Supported design and implementation of comprehensive organizational transformations including establishing a diversity, equity, and inclusion (DEI) team, a robust employee onboarding program, a revised compensation structure, and undertaking a complete organizational rebranding.
- Served as the Board of Directors liaison, upholding standards of board governance, guiding the strategic trajectory of meetings, creating financial and programmatic reports, and coordinating logistics for a spectrum of board-related events.

Project Coordinator/Project Assistant, Research Projects September 2010 – July 2016
The Educational Policy Improvement Center (EPIC)

- Supported research and evaluation projects and grants through effective client communication, data analysis, leadership of collaborative team sessions, formal report writing, and the consistent delivery of high-caliber materials.
- Directed the training and oversight of 200+ consultants through in-person and webinar orientations, task delegation, and progress monitoring to ensure punctual project completion.
- Engaged closely with clients to orchestrate personalized community involvement sessions, school site observations, and design surveys and focus groups tailored to capture the distinct needs of diverse communities.
- Led comprehensive event and logistics planning for nationwide workshops, encompassing participant registration, communication management, and on-site venue arrangements.
- Produced professional research reports, presentations, and informative brochures employing desktop publishing software.

Ambassador, Student Orientation Programs September 2008 – August 2010
University of Oregon

- Assisted admissions counselors during on-campus events, focusing on engaging nontraditional or underrepresented student populations and families, which included facilitating seamless on-site registration, leading information sessions, and conducting campus tours.
- Engaged with an extensive network of student leads each month; showcased a comprehensive grasp of the university's academic programs, student services, and admissions prerequisites, effectively communicating this knowledge to prospective students and their families.

EDUCATION

Bachelor of Science
Business Administration
Robert D. Clark Honors College
University of Oregon
Eugene, OR

CERTIFICATIONS

Society for Human Resource Management Certified Professional (SHRM-CP)
Earned February 2023

PUBLICATIONS

Conley, D. T., McGaughy, C., Davis-Molin, W., Farkas, R., Fukuda, E. (2014). International Baccalaureate diploma programme: Examining college readiness. Prepared for the International Baccalaureate Organization. Eugene, OR: Educational Policy Improvement Center.

McGaughy, C., Farkas, R., Hopper-Moore, G. (2013). Career and technical education professional development and formative performance assessment. Prepared for the Oregon Department of Education. Eugene, OR: Educational Policy Improvement Center.

PUBLICATIONS (continued)

McGaughy, C., van der Valk, A., Singleton, J., Zalewski, T., & Farkas, R. (2012). Bridging the gap: An Illinois toolkit for using Common Core for secondary and postsecondary alignment. Prepared for the Illinois Community College Board, Illinois Board of Higher Education, and Illinois State Board of Education. Eugene, OR: Educational Policy Improvement Center.

Educational Policy Improvement Center. (2011). Connecticut college and career readiness toolkit. Prepared for the Connecticut P–20 Council. Eugene, OR: Educational Policy Improvement Center.

McGaughy, C., van der Valk, A., Zalewski, T., Farkas, R. & de González, A. (2011). Asia Society 12th grade performance outcomes: Phase I analysis crosswalk to the Common Core State Standards. Prepared for the Asia Society. Eugene, Oregon: Educational Policy Improvement Center

Conley, D. T., McGaughy, C., van der Valk, A., Zalewski, T., & Farkas, R. (2011). Texas college and career readiness assignments: Final report for the Texas College and Career Readiness Initiative. Eugene, OR: Educational Policy Improvement Center.

Sonia Jeanne Horst
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Phone: (540) 908-8528
Email: jeanne.horst@gmail.com

Educational Experience

2004 – 2010 PhD
James Madison University
Psychology (specialty in Assessment and Measurement)
Dissertation: "A Mixture-Modeling Approach to Exploring Test-Taking Motivation in Large-Scale Low-Stakes Contexts"

2002 – 2004 MA
James Madison University
MA in Psychological Sciences
Concentration: Assessment, Measurement and Statistics
Thesis: "A Measure of Social Goal Orientation Reconsidered: Examining Psychometric Properties"

1986 – 1988 BA (Summa cum laude)
Millersville University
BA in Psychology

1976 – 1979 RN
Pennsylvania College of Health Education
(Formerly Lancaster General Hospital/Lancaster Institute for Health Education)
RN degree and licensure

Recent Work Experience

2025 – present **Inflexion**
Senior Evaluation Consultant
Design and lead rigorous studies that inform program improvement and policy decisions.

2021 – 2025 **CommonLit**
Director of Research and Evaluation
Planned and conducted evaluation studies using a mixed-methods approach, ranging from case studies and semi-structured interviews to quasi-experimental designs. Conducted data management, wrote reports to a wide variety of audiences, graphically presented data in a variety of formats, facilitated meetings and workshops, conducted organizational strategic planning and visionary work, collaborated with external partners, and managed research analysts.

2012 – 2021 **Center for Assessment and Research Studies at James Madison University**
Through my role in the Center for Assessment and Research Studies, I provided assessment consultation services across the JMU campus.

Professional development (Fall 2018 through Fall 2021)
Plan and conduct assessment-related professional development activities to aid faculty and staff in developing knowledge, skills, and attitudes for conducting high-quality assessment. Facilitate weeklong *Assessment 101* workshops. The workshops lead faculty and staff members (JMU and world-wide participants) through the student learning assessment cycle. Participants complete a deliverable, in the form of an assessment plan. Although this is a group workshop, one-on-one consultation is offered throughout the workshop. Following the workshop, constructive feedback on their project is provided to participants.

Assessment consultation (2012 to 2021)
Provide assessment support and consultation to faculty and staff across the JMU campus. Collaborate with faculty and staff, one-on-one or in committees, to provide support in developing student learning outcomes, curriculum mapping, selection and designing of instruments/measures/surveys, developing data collection plans, analyzing and interpreting data, reporting and data visualization, and use of results for student learning improvement.

2012 – 2021 **Department of Graduate Psychology**
Associate Professor (2016 – 2021); Assistant Professor (2012 – 2016)
Courses taught: Statistics Refresher Boot Camp, Intermediate Inferential Statistics, Multivariate Statistics, Quasi-Experimental Research Design and Propensity Score Analysis, Mentor/advisor to graduate students

2007 – 2012 **Eastern Mennonite University**
Assistant Professor (2007 – 2012)
Courses taught: General Psychology, Developmental Psychology, Developmental Psychology Case Study, Cognitive Psychology, Social Psychology, Abnormal Psychology, Psychological Tests and Measurements, Neuropsychology, Theories of Personality, Creativity in Film, Research Methods I and II, and Mentoring of Capstone Research Projects.

Office of Institutional Research and Effectiveness (2005 – 2007)
Gathered and analyzed data for external and internal reporting; provided assessment consultation across campus; served on the Assessment Subcommittee of the Committee on Teacher Effectiveness; served as web curator for the Institutional Research and Effectiveness Office; designed web surveys for departmental and university-wide assessments; and conducted research consultation. Other service: Institutional Effectiveness Committee (2005 – 2007), Global Village Taskforce (general education assessment; 2005 – 2007).

Editorial & Review Boards

Practical Assessment Research & Evaluation, 2016 to 2021; *Research and Practice in Assessment,* 2016 to 2024; *International Journal of Responsibility,* 2019 to 2021 *SAGE Open – Education,* 2015 to 2020; *American Educational Research Association* Proposal Reviewer, 2012-13, 2015-16

Grants

Horst, S. J. (2018). *Meeting Assessment Professional Development Needs Across Virginia: A Virtual Drive-In.* 4-VA grant award funding a Spring Drive-In for the Virginia Assessment Group, $1,500.00 with complementary funding at the five additional 4-VA locations.

Leventhal, B. C., **Horst, S. J.,** Ford, K. A. (2017). *Stats Refresher Boot Camp Workshop: Sharing What We've Learned and How to Do it Yourself.* 4-VA grant award for purpose of funding a zero-credit three-day statistics boot camp and dissemination of scholarship, $5,000.00.

Horst, S.J., & Ford, K. A. (2016). *Increasing Stats Efficacy through Summer Stats Refresher Boot Camp.* 4-VA grant award for purposes of funding a zero-credit three-day statistics boot camp, $4,754.63.

Publications

Horst, S. J., Leventhal, B. C., Clarke, K. E., & Hazard, G. (2021). Bringing together two ends of the spectrum. *Assessment Update, 33*(5), 4-14.

Horst, S. J., Finney, S. J., Prendergast, C. O., Pope, A. M., & Crewe, M. E. (in press). The credibility of inferences from program effectiveness studies published in student affairs journals: Potential impact on programming and assessment. *Research & Practice in Assessment.*

Robinson, C., Prendergast, C. O., **Horst, S. J.,** & Hawk, W. J. (in press). Ethical reasoning and the five roles of the assessment practitioner. *AALHE Intersection: A Journal at the Intersection of Assessment and Learning.*

Prendergast, C. O., & **Horst, S. J.** (2021, June). *Assessment professional development competencies: Applications of the assessment skills framework* (Occasional Paper No. 55). Urbana, IL: University of Illinois and Indiana University, National Institute for Learning Outcomes Assessment. https://www.learningoutcomesassessment.org/wp-content/uploads/2021/06/ASF-Paper_FINAL.pdf

Horst, S. J., Prendergast, C. O., Robinson, C., & Hawk, W. J. (2021, April). Ask eight key ethical questions: A strategy for incorporating diversity, equity, and inclusion values into assessment planning. *Emerging Dialogues in Assessment.* https://aalhe.memberclicks.net/emerging-dialogues---ask-eight-key-ethical-questions

Horst, S. J., & Prendergast, C. O. (2020). The Assessment Skills Framework: A taxonomy of assessment knowledge, skills and attitudes. *Research & Practice in Assessment, 15,* 1- 25. http://www.rpajournal.com/dev/wp-content/uploads/2020/05/The-Assessment-Skills-Framework-RPA.pdf

Meixner, C., Pope, A. M., & **Horst, S. J**. (2020). Implementation fidelity in the classroom: Exploring the alignment of pedagogy to learning outcomes. *Journal of Faculty Development, 34,* 15-22.

Holzman, M. A., Pope, A.M., & **Horst, S. J.** (2020, Winter). Reliability and validity 101: A primer for student affairs assessment. *AALHE Intersection: A Journal at the Intersection of Assessment and Learning,* 5-9. https://www.aalhe.org/assets/docs/Intersection/AALHE_winter_2020_intersection_final.pdf

Finney, S. J., & **Horst, S. J.** (2019). Standards, standards, standards: Mapping professional standards for outcomes assessment to assessment practice. *Journal of Student Affairs Research and Practice, 56,* 310-325.

Finney, S. J., & **Horst, S. J.** (2019). The status of assessment, evaluation, and research in student affairs. In Z. Davenport & V. L. Wise (Eds.), *Student affairs assessment, evaluation, and research: A guidebook for graduate students and new professionals* (pp. 3-19). Springfield, IL: Charles Thomas Publisher.

Finney, S. J., Barry, C. L., **Horst, S. J.,** & Johnston M. M. (2019). Exploring profiles of academic help seeking: a mixture modeling approach. *Learning and Individual Differences, 61,* 158-171.

Horst, S. J., & Ames, A. J. (2018, Winter). Bringing together assessment and learning improvement: Dreaming big for an inaugural summit. *Research & Practice in Assessment, 13,* 6-10.

Leventhal, B. C., **Horst, S. J.,** Sauder, D. C., & Ford, K. (2018). Can a three-day intensive statistics boot camp increase graduate students' core knowledge and self-efficacy? In M. A. Sorto, A. White, & L. Guyot (Eds.), *Looking back, looking forward. Proceedings of the Tenth International Conference on Teaching Statistics (ICOTS10, July, 2018), Kyoto, Japan.* Voorburg, The Netherlands: International Statistical Institute. Retrieved from https://iase-web.org/icots/10/proceedings/pdfs/ICOTS10_C302.pdf

Horst, S.J., & Harris, H.D. (2018). Propensity scores. In B. B. Frey (Ed.), *The SAGE Encyclopedia of Educational Research, Measurement, and Evaluation.* (pp. 1326-1328). Thousand Oaks, CA: SAGE.

Horst, S. J. & Jacovidis, J. N. (2018). Locus of control. In B. B. Frey (Ed.), *The SAGE Encyclopedia of Educational Research, Measurement, and Evaluation.* (p. 989) Thousand Oaks, CA: SAGE.

Horst, S. J. & Pyburn, E. M. (2018). Likert scaling. In B. B. Frey (Ed.), *The SAGE Encyclopedia of Educational Research, Measurement, and Evaluation.* (pp. 975-977). Thousand Oaks, CA: SAGE.

Sequeira, S. N., Holzman, M. A., **Horst, S. J.,** & Ghant, W. A. (2017). Developing college students' civic-mindedness through service-learning experiences: A mixed-methods study. *The Journal of Student Affairs Inquiry, 2* (1), 1-31. https://jsai.scholasticahq.com/issue/395

Jacovidis, J. N., Foelber, K. J., & **Horst, S. J.** (2016). The effect of propensity score matching method on the quantity and quality of matches. *The Journal of Experimental Education*, DOI: 10.1080/00220973.2016.1250209

Pyburn, E.M., **Horst, S.J.,** & Erbacher, M. (2016). Birds of a feather cluster together: Noncognitive attributes and international student success. *College Student Affairs Journal, 34*(3), 13-29.

Horst, S.J., & DeMars, C.E. (2016). Higher education faculty engagement in a modified mapmark standard setting. *Research and Practice in Assessment, 11,* 29-41. https://commons.lib.jmu.edu/gradpsych/57

Harris, H.D., & **Horst, S. J.** (2016). A brief guide to decisions at each step of the propensity score matching process. *Practical Assessment in Research and Evaluation, 21,* 1-10.

Ghant, W.A., **Horst, S.J.,** & Whetstone, D.H. (2016). Portrait of a Federal Work Study Assessment. *Journal of College Student Development, 57,* 210-212.

Jacovidis, J., Clarke, K., Hazard, G, & **Horst, S. J.** (2016, April). Not my bunnies and not my hat. *AAHLE Intersection, 8-11.*

Horst S.J. (2015). *Critical Synthesis Package: Decision Regret Scale*. MedEdPORTAL Publications; 2015. Available from: https://www.mededportal.org/publication/10147 [Note: a free log-in is necessary to retrieve the full set of materials.]

Horst, S.J., Ghant, W.A., & Whetstone, D.H. (2015). Enhancing assessment through the use of mixed methods. *Assessment Update, 27,* 4-14. doi: 10.1002/au

MacDonald, S. K., Williams, L.M., Lazowski, R.A., **Horst, S.J.,** & Barron, K.E. (2014). Faculty attitudes toward general education assessment: A qualitative study about their motivation. *Research and Practice in Assessment, 9,* 74-90.

Cessna, S., Graber Neufeld, D.G., & **Horst, S.J.** (2013). Teaching the nature of science in a course in sustainable agriculture. *Natural Sciences Education, 42,* 36-42.

Kishbaugh, T.K., Cessna, S., **Horst, S.J.,** Leaman, L., Flanagan, T., Graber Neufeld, D., & Siderhurst, M. (2012). Measuring beyond content: A rubric bank for assessing skills in authentic research assignments in the sciences. *Chemistry Education Research and Practice, 13,* 268-276. doi: 10.1039/c2rp00023g

Henriques, G., Keffer, S., Abrahamson, C., & **Horst, S.J.** (2011). Exploring the effectiveness of a computer-based heart rate variability biofeedback program in reducing anxiety in college students. *Applied Psychophysiological Biofeedback, 36,* 101-112. doi: 10.1007/s10484-011-9151-4

Barry, C. L., **Horst, S. J.,** Brown, A. R., Finney, S. J., & Kopp, J. P. (2010). Do examinees have similar test-taking effort? A high-stakes question for low-stakes testing. *International Journal of Testing, 10,* 342-363.

Horst, S. J. (2010). *A mixture-modeling approach to exploring test-taking motivation in large-scale low-stakes contexts. (*Unpublished doctoral dissertation). James Madison University, Harrisonburg, VA.

Thelk, A.D., Sundre, D.L., **Horst, S.J.,** & Finney, S.J. (2009). Motivation matters: Using the Student Opinion Scale (SOS) to make valid inferences about student performance. *Journal of General Education, 58,* 129-166.

Horst, S. J., Finney, S. J., & Barron, K. E. (2007). Moving beyond academic achievement goals: A study of social achievement goals. *Contemporary Educational Psychology, 32,* 667-698.

Fairchild, A.J., **Horst, S.J.,** Finney, S.J., & Barron, K.E. (2005). Evaluating new and existing validity evidence for the academic motivation scale. *Contemporary Educational Psychology, 30,* 331-358.

Invited Talks, Workshops, and Panels

Prendergast, C. O., Curtis, N., **Horst, S. J.,** & Anderson, R. (2021, June). *Building your institution's assessment competency: The assessment professional's role in professional development.* Ninety-minute skills development workshop at the virtual annual meeting of the Association for the Assessment of Learning in Higher Education (AALHE).

Horst, S. J., & Perkins, B. A. (2020, Oct). *Quasi-experimental Research Designs within the Educational Context.* Three-hour invited workshop presented at the annual meeting of the Northeastern Educational Research Association.

Prendergast, C., Pope, A., & **Horst, S. J.** (2019, October). *Creating the Assessment Skills Framework: Classifying and identifying professional development needs.* Presentation at the IUPUI Assessment Institute, Indianapolis, IN.

Craig, B. G., Perkins, B. A., **Horst, S. J.,** & Harris, H. D. (2019, October). *Generalized Boosted Modeling in R.* Workshop presented at the annual meeting of the Northeastern Educational Research Association, Trumbull, CT.

Pope, A.M., **Horst, S.J.,** Prendergast, C., Finney, S.J., & Crewe, M. (2019, June). L*et's get real: Applying research design principles to a messy assessment world.* Workshop presented at the annual meeting of the Association for the Assessment of Learning in Higher Education (AALHE). St. Paul, MN.

Horst, S.J., Lovett, M., Hershock, C., Finney, S.J. & Fulcher, K. H. (2019, June). *Assessment for learning improvement: Comparing two universities' approaches to reveal key principles and strategies.* Educause Webinar.

Pope, A., Prendergast, C., Crewe, M., & **Horst, S. J.** (2019, April). *Answering the right questions…Can we back up that claim?* Virginia Assessment Group 2019 Spring Drive-In. Telepresence workshop across six Virginia universities, Harrisonburg: VA.

Horst, S. J. (2018, November). *Promoting quality through publication and review.* Invited workshop at the 2018 Virginia Assessment Group Annual Meeting, Charlottesville, VA.

Horst, S. J., Perkins, B. A., & Leventhal, B. C. (2018, August) *Statistics refresher boot camp.* Three-day workshop on graduate-level introductory statistics for graduate students and faculty at James Madison University, Harrisonburg, VA.

Horst, S. J., & Leventhal, B. C. (2018, July). *Connecting two ends of the spectrum: An opportunity for faculty development in assessment.* Invited talk at Kyoto University, Kyoto, Japan.

Leventhal, B. C. & **Horst, S.J.** (2018, July). *Statistics refresher boot camp workshop: Development of an active learning environment.* Invited workshop presented at the Tenth International Conference on Teaching Statistics (ICOTS10), Kyoto, Japan.

Horst, S. J. (2017, October). *JMU International Programs and Assessment.* Workshop presented to administrative personnel at the Universitas Katolik Parahyangan (UNPAR). Bandung, Indonesia.

Horst, S. J. (2017, October). *JMU Multicultural Programs and Assessment.* Workshop presented to administrative personnel at the Universitas Katolik Parahyangan (UNPAR). Bandung, Indonesia.

Horst, S. J. (2017, October). *Assessment at JMU.* Workshop presented to administrative personnel at the Universitas Katolik Parahyangan (UNPAR). Bandung, Indonesia.

Horst, S. J. (2017, October). *Critical Thinking and Ethical Reasoning at JMU.* Workshop, including JMU's *It's Complicated: Contagion,* presented to law students and faculty at the Universitas Katolik Parahyangan (UNPAR). Bandung, Indonesia.

Hazard, G. A., Clarke, K., & **Horst, S. J.** (2017, February). *Boring, ugly, useless reports: Where evidence goes to die.* Workshop presented at the 2017 AAC&U General Education and Assessment: Design Thinking for Student Learning Conference. Phoenix, AZ.

Horst, S. J., Sauder, D., & Leventhal, B. C. (2017, Aug) *Statistics refresher boot camp.* Three-day workshop on graduate-level introductory statistics for graduate students and faculty at James Madison University, Harrisonburg, VA.

Harris, H., & **Horst, S.J.** (2017, February). *Propensity score matching.* Invited remote workshop for the Learning Assembly organization. Harrisonburg, VA.

Gregg, N., Holzman, M. A., & **Horst, S.J.** (2016, November). *Telling the whole story: Illuminating student voices behind the numbers.* Pecha Kucha presentation with discussion. Virginia Assessment Group, Norfolk, VA.

Harris, H., **Horst, S. J.,** & Jacovidis, J. (2016, October). *Propensity score analysis.* Pre-conference workshop presented at the Northeastern Educational Research Association Annual Meeting, Trumbull, CT.

Harris, H., Pyburn, E., Jacovidis, J., Foelber, K., & **Horst, S.J.** (2015, October). *Some people were made to be together: Propensity score matching in higher education assessment.* Symposium presented at the Northeastern Educational Research Association Annual Meeting, Trumbull, CT.

Pyburn, E., **Horst, S.J.,** Erbacher, M.K., & Harris, H. (2015, October). *Making it personal: The utility of person-centered analysis in academic research.* In-conference workshop presented at the Northeastern Educational Research Association Annual Meeting, Trumbull, CT.

Howley, T., Ghant, W., & **Horst, S.J.** (2015, September). *Playing in the sandbox: Collaborations across the university.* Workshop presented at the Engaged Scholars Consortium, State College, PA.

Pyburn, E.M., Harris, H., Foelber, K.J., Erbacher, M.K., & **Horst, S.J.** (2015, September). *What goes around comes around: Continuous improvement and impact measurement using the assessment cycle.* Workshop presented at the Engaged Scholars Consortium, State College, PA.

Hazard, G., & **Horst, S.J.** (2014, November). *Creating effective assessment reports.* Invited Pecha Kucha presentation with discussion. Virginia Assessment Group, Norfolk, VA.

Hazard, G., Clarke, K., & **Horst, S.J.** (2014, September). C*oming to terms with your assessment disorder: How to embrace assessment to improve liberal education pedagogy.* Preconference Workshop at the Association of General and Liberal Studies Annual Conference, Atlanta, GA.

Horst, S.J. (2013, June). *Assessment at James Madison University.* Invited presentation to participants of the Riva Institute for Assessment in Higher Education. Riva San Vitale, Switzerland.

Horst, S.J., & Miller, B.J. (2013, April) *Assessment 101: Getting the most out of your objectives, Mapping & Measuring, and Course-Embedded Assessment.* Invited day-long workshop to participants of VCCS Mid-Central Region Center for Teaching Excellence. Rappahanock Community College, Warsaw, VA.

Professional Presentations

Prendergast, C. O., Robinson, C., & **Horst, S. J.** (2021, June). *Assessment ethics: Applying an ethical reasoning framework to professional standards in assessment.* On demand presentation for the virtual annual meeting of the Association for the Assessment of Learning in Higher Education (AALHE).

Fulcher, K. H., Patterson, C. R., & **Horst, S. J.** (2020, October). *Developing an assessment and improvement mindset.* Workshop at the virtual Assessment Institute.

Prendergast, C. O., & **Horst, S. J.** (2020, October). *Planning assessment professional development opportunities: Applying an expectancy-value theory lens.* Workshop at the virtual Assessment Institute. https://iu.mediaspace.kaltura.com/media/1_vnmganks

Curtis, N., Anderson, R., Van Dyke, R., **Horst, S. J.,** & Prendergast, C. O. (2020, June). *Are we effectively training and developing assessment professionals?* Panel presented at the annual meeting of the Association for the Assessment of Learning in Higher Education (AALHE).

Perkins, B. A. & **Horst, S. J.** (2020, Apr). *Propensity score analysis when treatment group is larger than comparison group: An applied assessment example.* Paper presented at the Annual Meeting of the American Educational Research Association, San Francisco, CA. https://convention2.allacademic.com/one/aera/aera20/ (Conference cancelled) http://tinyurl.com/ufwcmt2

Garant, R. C., Perkins, B. A., Hartka, T., & **Horst, S. J.** (2019, November). *Nobody puts assessment results in the corner! Effectively using assessment results, program theory, and implementation fidelity to evidence learning improvement.* Presentation at the Virginia Assessment Group Conference, Richmond, VA.

Craig, B. G., **Horst, S. J.,** & Harris, H. D. (2019, October). S*onography certification examinations: The influence of practice tests and self-selection bias.* Paper presentation at the annual meeting of the Northeastern Educational Research Association, Trumbull, CT. *Winner of the NERA Best Paper by a Graduate Student Award.*

Harris, H. D., & **Horst, S. J.** (2019, July). *The effect of differential measurement error on treatment effect estimation.* Paper presentation at the annual International Meeting of the Psychometric Society. Santiago, Chile.

Horst, S. J., & Leventhal, B. C. (2019, June). *Asking questions: A guide for how to use assessment to connect faculty with administration interests.* Paper presentation at the annual meeting of the Association for the Assessment of Learning in Higher Education (AALHE), St. Paul, MN.

Boyne, S., Fulcher, K. H., & **Horst, S. J.** (2019, June). *Cross-pollination: Visiting other institutions and bringing assessment strategies back home.* Presentation at the annual meeting of the Association for the Assessment of Learning in Higher Education (AALHE), St. Paul, MN.

Craig, B. G., & **Horst, S. J.** (2019, May). *Relationship between practice tests and sonography certification scores.* Presentation at Inteleos, Rockville, MD.

Craig, B. G., Thompson, K., Leventhal, B. C., & **Horst, S. J.** (2019, May). *Mindset and motivation: Attitudinal predictors of first-year oral communication competence.* Poster presentation at the Association of Psychological Sciences Annual Meeting, Washington, DC.

Perkins, B. A., **Horst, S. J.,** Leventhal, B. C., & Zapparrata, N. M. (2019, May). *Evaluating the impact of a statistics refresher course on statistics knowledge, statistics self-efficacy, and statistics anxiety.* Poster presented at the United States Conference on Teaching Statistics, State College, PA.

Holzman, M. A., & **Horst, S. J.** (2019, April). *Treatment-comparison group ratio and accuracy of treatment effect estimates after propensity score matching.* Paper presented at the annual meeting of the American Educational Research Association, Toronto, CA.

Harris, H. D., & **Horst, S. J.** (2019, March). *The effect of differential measurement error on numeric covariate balance.* Poster presented at the annual meeting of the Society for Research on Educational Effectiveness. Washington, DC.

Finney, S. J., & **Horst, S. J.** (2019, March). *Standards, standards, standards: Mapping professional standards to assessment practice.* Presentation at the annual ACPA conference, Boston, MA.

Thompson, K., Craig, B., Leventhal, B. C., & **Horst, S. J.** (2018, November). *Let's talk about attitudes: What predicts first-year oral communication competence?* Poster presented at the Virginia Assessment Group annual meeting, Charlottesville, VA.

Ball, T. C., Ong, T., **Horst, S. J.,** & Hazard, G. A. (2018, November). *I can't do public speaking (yet): Theories of intelligence adapted to speech performance.* The 2018 annual meeting of the National Communication Association, Salt Lake City, Utah. Note: this paper won the Basic Course Division Top Paper Award.

Leventhal, B. C. & **Horst, S.J.** (2018, July). *Every learner is unique so why couldn't their assignments be unique? The use of simulated datasets in inferential statistics courses.* Poster presented at the Tenth International Conference on Teaching Statistics (ICOTS10), Kyoto, Japan.

Leventhal, B. C., & **Horst, S. J.** (2018, July). *Can a three-day intensive statistics boot camp increase graduate students' core knowledge and self-efficacy?* Paper presented at the Tenth International Conference on Teaching Statistics (ICOTS10), Kyoto, Japan.

Finney, S. J., & **Horst, S. J.** (2018, June). *Student affairs professionals' commitment to and competency in assessment: Spotlighting an often-untapped partner in evidencing student learning.* Presentation at HEDS Annual Meeting, Spokane, WA.

Sauder, D., Leventhal, B. C., & **Horst, S. J**. (2018, May). *Effects of a summer statistics refresher boot camp.* Poster presentation at the annual meeting of the CAUSE Electronic Conference on Teaching Statistics 2018, State College, PA. (https://www.causeweb.org/cause/ecots/ecots18/program/posters).

Horst, S. J., & Smith, M. (2017, November). *Developing a writing assessment through a "Group Assessment Fellows" experience.* Poster presentation at the annual meeting of the Virginia Assessment Group. Richmond, VA.

Harris, H. D., & **Horst, S. J.** (2017, July). *Investigating the effect of covariate selection on treatment estimation when using propensity score matching techniques: A simulation study.* Poster presentation at the annual International Meeting of the Psychometric Society. Zurich, Switzerland.

Finney, S. J., & **Horst, S. J.** (2017, May). *Extending the 3x2 achievement goal model to the general academic domain.* Poster presentation at the annual meeting of the American Psychological Science. Boston, MA.

Holzman, M., Pope, A., & **Horst, S. J.** (2017, March). *Reliability and validity 101: Applying measurement to student affairs assessment.* Professional presentation at the annual meeting of the American College Personnel Association. Columbus, OH.

Holzman, M. & **Horst, S. J.** (2016, July). *A mixed-methods approach to differential item functioning.* Poster presentation at the International Meeting of the Psychometric Society, Asheville, NC.

Harris, H. D., & **Horst, S. J.** (2016, April). P*ropensity score matching in higher education assessment.* Paper presentation at the American Educational Research Association Annual Meeting, Washington, DC.

Pyburn, E. M., & **Horst, S. J.** (2016, April). *Persons can speak louder than variables: Person-centered approaches to student learning assessment.* Poster presentation at the American Educational Research Association Annual Meeting, Washington, DC.

Ball, T. C., Smith, E. L., & **Horst, S. J.** (2016, April). *Developing a measure of students' attitudes towards communication.* Paper presentation at the Eastern Communication Association Annual Meeting, Baltimore, MD.

Howley, T., Ghant, W., & **Horst, S.J.** (2015, September). *Connecting the dots: Community health, civic engagement, and service learning.* Presentation at the Engaged Scholars Consortium, State College, PA.

Harris, H., **Horst, S.J.,** Barron, K.E., Hazard, G., & Hulleman, C.S. (2015, April). *First-year Undergraduate student expectancy and value for general education.* Paper presented at the annual American Educational Research Association conference, Chicago, IL.

Foelber, K.J., Erbacher, M.K., & **Horst, S.J.** (2015, April). *Factor analyzing change scores from the civic-mindedness scale.* Paper presented at the annual National Council for Measurement in Education conference, Chicago, IL.

Foelber, K.J., **Horst, S.J.,** & Erbacher, M.K. (2014, October). *Examining the factor structure of the civic-mindedness scale.* Paper presented at the annual conference of the Northeastern Educational Research Association, Trumbull, CT.

Harris, H. D., Mathers, C. E., Sauder, D. C., & **Horst, S. J.** (2014, October). *An investigation of the dimensionality and measurement properties of the revised interpersonal and problem-solving scale.* Paper presented at the annual conference of the Northeastern Educational Research Association, Trumbull, CT.

Pyburn, E.M., **Horst, S.J.,** & Erbacher, M. (2014, October). *International student success: An application of cluster analysis to predict GPA.* Paper presented at the annual conference of the Northeastern Educational Research Association, Trumbull, CT.

Pyburn, E.M., Johnston, M., **Horst, S.J.,** & Hathcoat, J. (2014, October). *A psychometric evaluation of the Miami University Diversity Awareness Subscales.* Paper presented at the annual conference of the Northeastern Educational Research Association, Trumbull, CT.

Clarke, K., Hazard, G., & **Horst, S.J.** (2014, August). *The role of a required information literacy competency exam in the first college year: What test data can, cannot, and might reveal (Lightning Talk).* Presentation at the 2014 Association of Research Libraries Assessment Conference in Seattle, Washington. http://libraryassessment.org/schedule/index.shtml

Horst, S.J., Ghant, W.A., & Whetstone, D.H. (2014, June). *Enhancing student affairs assessment through the use of mixed methods.* Presentation at the 2014 NASPA (Student Affairs Professional organization) Assessment and Persistence Conference in San Antonio, TX.

Kratz, J.A., Panizo, M., Hart, V., & **Horst, S.J.** (2013, November). *Student success: Identifying academically at-risk international students.* Presentation at the NAFSA: Association of International Educators Annual Conference. Pittsburgh, PA.

Pyburn, L., **Horst, S.J.,** Kratz, J.A., & Erbacher, M.K. (2013, November). *Country of origin and help-seeking: Does one size fit all?* Poster presentation at the Virginia Assessment Group Annual Meeting. Roanoke, VA.

Harris, H., & **Horst, S.J.** (2013, October*). Investigating underrepresented students' academic outcomes: Using multiple matching techniques.* Paper presentation at the Northeastern Educational Research Association. Rocky Hill, CT.

MacDonald, S.K., Williams, L.M., Lazowski, R.A., **Horst, S.J.,** & Barron, K.E. (2013, October*). Faculty attitudes towards assessment: A mixed methods study using motivation theory.* Paper presentation at the Northeastern Educational Research Association. Rocky Hill, CT.

Panizo, M., Kratz, J.A, Hart, V., & **Horst, S.J.** (2013, October*). Non-cognitive factors that identify academically at-risk international students.* Paper presentation at the Northeastern Educational Research Association. Rocky Hill, CT.

Sessoms, J., Fulcher K.H., & **Horst, S.J.** (2012, November). *Assessing student development in writing: The benefits of sound research design and faculty buy-in.* Poster presentation at the Virginia Assessment Group Annual Meeting. Richmond, VA.

Fisher, R.C., Horst, M.L., Miller, B.J., & **Horst, S.J.** (2011, October). *To serve and lead: Operationally defining servant leadership.* Poster presentation at the Northeastern Educational Research Association. Rocky Hill, CT.

Horst, S.J., Finney, S. J., Enders, C. K. (2011, April). *Exploring examinee motivation in a low-stakes testing context.* Paper presentation at the American Educational Research Association Annual Meeting, New Orleans, LA.

Cessna, S., Flanagan, T., **Horst, S.J.,** & Leaman, L. (2010, September). *Cross-disciplinary collaboration on rubric development.* Presentation at Virginia Educational Research Association: Assessment and Accountability in Curriculum Projects. Charlottesville, VA.

Barry, C. L., **Horst, S. J.,** Finney, Brown, A. R., & Kopp, J. P. (2010, April). *Do Types of Test-Takers Exist? A High-Stakes Question for Low-Stakes Testing.* Poster presentation at the 2010 Annual Meeting of the National Council on Measurement in Education, Denver, Colorado.

Thelk, A. D., Sundre, D. L., **Horst, S. J.,** & Finney, S. J. (2009, October). *Motivation matters: Using the Student Opinion Scale (SOS) to make valid inferences about student performance.* Paper presentation at the 2009 Northeastern Education Research Association, Rocky Hill, CT.

Brown, A. R., Barry, C. L., **Horst, S. J.,** Finney, S. J., & Kopp, J. P. (2009, October). *Toward a better understanding of test-taking motivation in low-stakes testing sessions.* Paper presentation at the 2009 Annual Meeting of the Northeastern Educational Research Association. Rocky Hill, Connecticut.

Barry, C.L., Finney, S.J., Johnston, M., & **Horst, S.J.** (2009, April). *Are there distinct academic help-seeking types? An application of mixture modeling.* Poster presentation at the 2009 meeting of the American Educational Research Association, San Diego, California.

Johnston, M., Barry, C.L., Finney, S.J., & **Horst, S.J.** (2008, October). *Using Mixture Modeling to Better Understand Academic Help Seeking in College.* Paper presentation at the 2008 meeting of the Northeastern Educational Research Association, Rocky Hill, Connecticut.

Kaliski, P.K., Finney, S.J., & **Horst, S.J.** (2005, April). *Does Socioeconomic Status Influence Achievement Goal Adoption? An Investigation of Group Differences using Structured Means Modeling.* Paper presentation at the 2006 meeting of the American Educational Research Association, San Francisco, California.

Horst, S.J., Finney, S.J., & Barron, K.E. (2005, April). *The study and revision of a social goal measure: An examination of the SAGOS*. Paper presentation at the 2005 meeting of the American Educational Research Association, Montreal, Quebec.

Wise, S. L., Owens, K., Yang, S., Weiss, B., **Horst, J.,** Kissel, H., & Kong, X. (2005, April). *An investigation of the effects of self-adapted testing on examinee effort and performance in a low-stakes achievement test.* Paper presentation at the 2005 meeting of the National Council on Measurement in Education, Montreal, Quebec.

Fairchild, A.J., **Horst, S.J.,** Finney, S.J., & Barron, K.E. (2004, April). *Evaluating new and existing validity evidence for the academic motivation scale.* Poster presentation at the 2004 meeting of the American Educational Research Association, San Diego, CA.

Laura M. Williams, Ph.D.

Mt. Crawford, VA

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SUMMARY OF QUALIFICATIONS

Experienced assessment strategist with over a decade of leadership in academic assessment design and development. Adept at managing cross-functional teams, aligning assessment standards, and leading large-scale initiatives with budgets exceeding $200K. Known for being approachable, engaging, and collaborative, with a reputation for resolving challenges effectively.

- **Assessment Consultation**
- **Assessment Design**
- **Assessment Development**
- **Measurement Theory**
- **Large Scale Assessment**
- **Project Planning**
- **Process Development**
- **People Leadership**
- **Psychometrics**

ASSESSMENT EXPERIENCE

Senior Lead Assessment Integrity Strategist, Credential Integrity (remote) **December 2021- present**
Western Governors University **Salt Lake City, UT**

Sets and maintain standards, practices, and policies core to WGU's competency-based education and assessment model.

- Develops and implements assessment standards and associated training, and change management materials, collaborating with project management team to craft policies and communication plans
- Partners with cross-functional departments to ensure alignment of standards across the university
- Acts as spokesperson for WGU's assessment model to internal and external audiences via conference presentations
- Represents assessment integrity through serving on committees and working groups
- Leads the reimagining of the General Education program assessment strategy, leveraging institutional and assessment expertise to drive innovation
- Chair the Committee for Assessment Standards and Practice

Senior Manager of Development, General Education (remote) **July 2019-November 2021**
Western Governors University **Salt Lake City, UT**

Ensured alignment and quality of all aspects of General Education curriculum and assessments.

- Defined, managed, and documented efficient and scalable development and production policies, methodologies, procedures, and content development standards
- Managed $200K project budgets for development and production for curriculum and assessment projects
- Nurtured relationships with external vendors, overseeing contracts for content development
- Led a diverse team of 10+ leaders and individual contributors, including managers, instructional designers, assessment developers, and instructional technologists

Interim Director, Assessment Design and Development (remote) **September 2018-July 2019**
Western Governors University **Salt Lake City, UT**

Provided thought leadership and vision for continuous improvement of student outcomes and overall health and of assessments.

- Collaborated with executive leadership and cross-functional team to ensure high-quality and innovative improvements to student experiences and processes
- Led senior managers in overseeing daily operations of department
- Served as escalation point for complex assessment issues, providing resolution and guidance on critical challenges
- Facilitated Monthly Business Reviews for department heads to present key metrics and goals to drive performance

KEY ACCOMPLISHMENTS: ***Met and exceeded metrics and goals each month.***

Senior Manager, Assessment Development, General Education (remote) **January 2018-July 2019**
Western Governors University **Salt Lake City, UT**

Partnered with key stakeholders in the university to ensure positive relationships, smooth delivery of assessment products, and efficient problem-solving.

- Led the design and development of key strategic initiatives in department
- Spearheaded the field-testing process for data collection and analysis
- Acted as the primary point of contact in the Director's absence, maintaining smooth operations and decision-making

- Supervised 2 assessment program managers and 5 assessment developers

Manager, Assessment Development, General Education (remote) **July 2017- January 2018**
Western Governors University **Salt Lake City, UT**
Provided leadership and strategic direction for General Education assessment design and development.

- Served as member of leadership team for Assessment Design and Development department
- Collaborated with the Curriculum Director and Instructional Design Manager to plan and execute college-level initiatives, including refining the general education structure, and evaluating course portfolio
- Led team of Program Managers and Assessment Developers

KEY ACCOMPLISHMENTS: ***Selected for LeaderChats, an invitation-only WGU leadership development program.***

Manager, Program Assessment (remote) **March 2016-July 2017**
Western Governors University **Salt Lake City, UT**
Collaborated with curriculum design personnel to ensure alignment between course curriculum and assessment design.

- Managed a team of 13 Assessment Program Managers while providing leadership and strategic direction for program-level assessment
- Served as contact point in absence of Director of Assessment Development

Assessment Program Manager, Business College (remote) **July 2015- March 2016**
Western Governors University **Salt Lake City, UT**
Managed the entire lifecycle of assessments including design, development, delivery, maintenance, and retirement.

- Led the assessment design process to produce quality test specifications and blueprints for assessment development
- Created and maintained detailed timelines and milestones for department

Coordinator, Program Assessment Support Services **July 2014- May 2015**
James Madison University **Harrisonburg, VA**
Managed and delegated workflow to ensure timely completion of consultation and data analysis projects.

- Supervised a team of 3 graduate assistants to provide effective assessment consultation to academic programs
- Communicated with campus constituents regarding the Assessment Progress Template, JMU's assessment reporting process for academic degree and certificate programs
- Coordinated logistics of the APT submission and feedback report processes
- Conducted data analysis and reporting related to assessment of student learning outcomes

Graduate Assistant **August 2012-July 2014**
James Madison University **Harrisonburg, VA**
Collaborated with the Office of Institutional Research to administer the Alumni Survey and create individualized reports for academic programs.

- Consulted with academic and library faculty to assist with departmental assessment of student learning outcomes
- Assisted with development and data analysis for the Madison Research Essentials Test
- Presented assessment-related workshops to clients and campus constituents
- Managed and analyze data for clients using SAS, SPSS, R, Excel, and Microsoft Office Suite
- Facilitated focus groups for purposes of program assessment

KEY ACCOMPLISHMENTS: ***Served as lead graduate assistant for the summer Assessment Fellows program, communicating with faculty fellows, coordinating consultants, and planning programs for implementation.***

ADDITIONAL EXPERIENCE

Academic and Career Advisor **September 2007- August 2012**
James Madison University **Harrisonburg, VA**

Assistant Director, Orientation **June 2004- August 2007**
James Madison University **Harrisonburg, VA**

SELECTED PRESENTATIONS

Williams, L.M. & Munson, L. & Fabbro, G. (2025, March). Creating a delightful experience: test administration strategies to reduce test anziety. Presented at the ATP Innovations in Testing conference, Orlando FL

Williams, L.M. & Heath, T. (2024 November). Integrity of All: Assuring quality in degree programs. Presented at the CBExchange conference, Colorado Springs CO

Williams, L.M. & Coen, S. (2024, October). Skills at your scale: How to integrate and assess workforce skills in curriculum. Presented at the Assessment Institute conference, Indianapolis IN

Williams, L. M. (2023, November). Creating authentic assessments: The role of skills and evidence-centered design. Presented at the CBExchange conference, Amelia Island, FL

Williams, L. M. & Coen, S. (2023, October). From the bottom up: Grounding assessment practice in workforce-relevant skills. Presented at the Assessment Institute conference, Indianapolis IN

Williams, L. M.., Heath, T., Thorne, K., & Boyer, N. (2023, March). Creating incremental value for learners: a skills-denominated approach. Presented at the ATP Innovations in Assessment conference, Dallas TX

Williams, L. M. & Heath, T. (2022, November). Accelerating to Opportunity: Implementing a Unified Achievement Framework for Learners to Earn and Demonstrate Value. Poster presentation at the Online Learning Consortium conference, Orlando FL

Williams, L. M., Gyll, S. P., & Meyers, J. l. (2019 June). Writing and evaluating multiple-choice assessment items. Presented at the Association for Assessment of Learning in Higher Education conference, St. Paul, MN

Williams, L. M., Gyll, S. P., & Toone, M. (2018 June). Assessment in competency-based education: An introduction.. Pre-conference workshop presented at the Association for Assessment of Learning in Higher Education conference, Salt Lake City, UT.

Stafford, A. & **Williams, L.M.** (2018 June). Making the case for objective assessments. Presented at the Association for Assessment of Learning in Higher Education conference, Salt Lake City, UT.

Williams, L. M. & Steele, E. (2017 June). Creating a program outcomes-based assessment model with evidence-centered design. Presented at the Association for Assessment of Learning in Higher Education conference, Louisville, KY.

Toone, M. & **Williams, L. M.** (2017, March). Quality competence: Establishing and promoting quality in program and assessment development. Presented at the Associate of Test Publishers (ATP) conference, Scottsdale, AZ.

Williams, L. M., Thorne, K. & Lualhati, J. (2017, March). Design with the destination in mind: Approaches for implementing validity theory in academic assessment. Presented at the Associate of Test Publishers (ATP) conference, Scottsdale, AZ.

Williams, L. M. & Thorne, K. (2017, March). Implementing evidence-centered design in large-scale academic assessment Presented at the Associate of Test Publishers (ATP) conference, Scottsdale, AZ.

Lawrence, N.K., Kelly, H.N., & **Williams, L. M.** (2015, May). Please don't text and drive: Induced Hypocrisy Motivates Drivers to Reduce Distractions. Poster presented at the 27th Annual Conference of the Association for Psychological Science, New York, NY.

Williams, L. M. & Swanson, M. R. (2014). But it doesn't count: A mixed-methods investigation of student test-taking motivation in low-stakes contexts. Paper presented at the Northeastern Educational Research Association Conference, Trumbull, CT.

Finney, S.J., Sundre, D. L., Swain, M. S., & **Williams, L. M.** (2014). Are value-added estimates influenced by test consequences in large-scale, low-stakes testing contexts? In Sundre, D.L. (Chair) The impact of test-taking motivation and test consequences on the validity of test score inferences. Symposium conducted at the annual conference of the American Educational Research Association (AERA), Philadelphia, PA.

Sundre, D. L. & **Williams, L. M.,** & Mabrey, P. (2013) Celebrating Assessment Engagement: JMU's Summer Assessment Fellowship Program. Presented at the Virginia Assessment Group Annual Conference, Richmond, VA.

MacDonald, S. K., **Williams, L. M.,** Lazowski, R. A., Horst, S. J. & Barron, K.E. (2013). Faculty attitudes toward assessment. Paper presented at the Northeastern Educational Research Association (NERA) Annual Conference, Rocky Hill, CT.

Swain M. S., **Williams, L. M.,** Hopkins, D. N., Sundre, D. L. & Finney, S. J. (2013). Investigating the (neglected) role of personality in testing. Poster presented at the Association for Psychological Science conference, Washington, DC.

Hopkins, D. N., Swain M. S., **Williams, L. M.,** Sundre, D. L. & Finney, S. J. (2013). Investigating the dimensionality of test-taking motivation across consequential test conditions. Poster presented at the Association for Psychological Science conference, Washington, DC.
Williams, L. M., Swain M. S., Hopkins, D. N., Sundre, D. L. & Finney, S. J. (2013). Do the stakes matter? The interplay of conscientiousness, effort, and performance. Poster presented at the American Educational Research Association conference, San Francisco, CA.

Williams, L. M., Hopkins, D. N., Swain, M. S., Sundre, D. L., & Finney, S. J. (2012, November). Raising the stakes: How feedback and personal consequences affect low-stakes test-taking motivation. Presented at the Virginia Assessment Group Annual Conference, Richmond, VA.

Williams, L. M., Orem, C., & Herrell, R. (2011, October). Assessing freshman advising: Using data to reach excellence. Presented at the National Academic Advising Association Annual Conference, Denver, CO.

Haas, L. M., Hakala, T., & Stensby-Hurst, N. (2010, April). The resume ruler. Roundtable discussion at the Virginia Association of Colleges and Employers State Conference, Charlottesville, VA.

Haas, L. M. (2010, March). Innovations in assessment: The resume ruler. Presented at the American College Personnel Association Conference, Boston, MA.

Baxter Magolda, M. B., **Haas, L. M.,** MacEchran, B., Quaye, S. J., & Taylor, K. (2007, April). Writing for about campus: A publishing workshop. Presented at the American College Personnel Association (ACPA)/National Association of Student Personnel Administrators (NASPA) Joint National Convention, Orlando, FL.

PUBLICATIONS

Williams, L.M., Serpati, L., Killian, R., & Heath, T. (2023). Assessment integrity: Foundations for high-quality credentials. Intersection: A Journal at the Intersection of Assessment and Learning. AALHE conference proceedings, 4(3)

Finney, S.J., Sundre, D. L., Swain, M. S., & **Williams, L. M.** (2016). The validity of value-added estimates from low-stakes testing contexts: The impact of change in test-taking motivation and test consequences.

MacDonald, S. K., **Williams, L. M.,** Lazowski, R. A., Horst, S. J. & Barron, K.E. (2014). Faculty attitudes toward general education assessment: a qualitative study about their motivation. Research & Practice in Assessment, 9, 74-90.

LEADERSHIP TRAINING AND RECOGNITION

Dare to Lead Training, April 2021
UPenn Resilience and Well-Being Training, June 2020
Emerging Leaders Mentor, Spring 2020
Chosen among people leaders at WGU to mentor employees interested in pursuing leadership roles
Evolving Leaders 2, December 2019
Leadership workshop targeted specifically for Senior Manager level at WGU
Resilient Manager Workshop, April 2017

PROFESSIONAL AFFILIATIONS

American Association of Learning in Higher Education

JOURNAL REVIEW

National Numeracy Network, Reviewer, 2014

About Campus Magazine, In Practice Department Editor, June 2004- August 2011

HONORS AND AWARDS

Exceptional Service Award, JMU Assessment and Measurement Program, 2015
Nominated for Provost's Award for Excellence in Academic Advising, 2007 and 2010
Madison Teaching Fellows Program 2009-10: Millennial Connections

UNIVERSITY AND COMMUNITY INVOLVEMENT

Fall Foliage Bicycle Festival Planning Committee, 2024-present
Student Representative, Assessment and Measurement PhD Program Committee, 2014-15
Center for Assessment and Research Studies Executive Director Search Committee, Fall 2014
Guest workshop facilitator, HR Training, James Madison University, 2011-2012
Judicial Council Member, James Madison University, Fall 2009-Spring 2012
Judicial Affairs Civic Learning Program Mentor, James Madison University, Fall 2008-Spring 2012
STEM Retention Working Group, James Madison University, Fall 2008
Exploring Dimensions of Diversity Participant, James Madison University 2007-08
Alternative Spring Break Learning Partner, 2007, 2008, 2009, 2011, 2012

EDUCATION

Doctor of Philosophy, Assessment and Measurement
James Madison University **Harrisonburg, VA**
Advisor: Dr. Donna L. Sundre
Dissertation: ***The Effect of Examinee Motivation on Value-Added Estimates***

Master of Science, College Student Personnel
Miami University **Oxford, OH**
Concentrations in Student Development and Higher Education Administration

Bachelor of Science, Biological Sciences, *cum laude*
Michigan Technological University **Houghton, MI**
Teacher Certification program (secondary education, biology and chemistry endorsements)

MATT COLEMAN

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PERSONAL STATEMENT

Dr. Matt Coleman has served at every level of the secondary education system—from educational assistant to assistant superintendent—bringing a deep, firsthand understanding of how schools work. In his leadership roles, he has helped drive systemic change that improved outcomes for all students, with a particularly positive impact on those historically underserved. As assistant superintendent in Springfield Public Schools, Matt led secondary reform efforts that increased graduation rates, decreased dropout rates, expanded access to advanced coursework, and significantly narrowed opportunity and achievement gaps across cultural groups. In 2014, Matt became CEO of Inflexion (formerly the Educational Policy Improvement Center), driven by a commitment to partner with school and district leaders to support lasting, equity-driven secondary school transformation. Under his leadership, Inflexion has built partnerships with state education agencies, county offices, school districts, and non-profit organizations nationwide. His work includes supporting high-quality implementation of Multi-Tiered Systems of Support (MTSS) and Community Schools at the state, county, district, and site levels.

PROFESSIONAL PREPARATION

DEd, 2008; Education Leadership, with an emphasis on learning assessment systems and performance; University of Oregon, Eugene, OR

MA, 1999; Master of Arts in Teaching; Basic Administrative License, 2000; Lewis and Clark College, Portland, OR

Teacher Credential Program, 1995; San Francisco State College, CA

BS, 1993; Psychology, magna cum laude; University of Oregon, Eugene, OR

APPOINTMENTS

Inflexion (previously Educational Policy Improvement Center), Eugene, OR

- Chief Executive Officer — 2014 to present

Springfield Public Schools, Springfield, OR

- Assistant Superintendent — 2012–2014
- Director of Secondary Education — 2008–2012

University of Oregon, College of Education, Eugene, OR

- Instructor, Administrative Licensure Program — 2008–Present
- Adjunct Faculty, Educational Methodology, Policy, and Leadership — 2008–2012

Beaverton School District, Portland, OR

- Principal, Westview High School (2700 Students) — 2005–2008

- Principal, Mountain View Middle School (1100 Students) 2003–2005
- Vice Principal, Aloha High School 1999–2003
- Practicum, Lewis and Clark College 1998–1999
- Science Teacher, Westview High School 1997–1999
- 8th-Grade Integrated Science Teacher, Whitford Middle School 1995–1997

Oakland Unified School District, Oakland, CA
- 9th-Grade Physical Science Teacher, Frick Junior High 1993–1995

Teach for America, Bay Area
- Corps Member 1993–1995

Springfield Public Schools, Springfield, OR
- Instructional Assistant, Springfield High School 1992–1993

SYNERGISTIC ACTIVITIES

Partnerships, Collaborations, and Innovative Projects

Regional Technical Assistance Center Partnership: Supporting Implementation of the Community School Model across California (2024-present). Inflexion partners with the Central Coast and Bay Area RTACs to support the high-quality implementation of the Community School model across California. This work includes direct support to districts and schools, capacity building for county offices, and alignment of local efforts with the California Community Schools Framework to ensure sustainable, equity-driven systems change.

Building Toward Computer Science Equity and Inclusion: Developing an Ecosystem of Support (2020- present). Funded by the US Department of Education (USDOE), this project seeks to increase the enrollment and retention of female students and Latinx students in computer science (CS) courses, by improving computational thinking (CT) skills, developing schoolwide and student-targeted CS-identity, and creating an ecosystem of supports to facilitate equity and inclusion in CS.

Bill & Melinda Gates NSI Model Design Grant (2020-2022). This grant built capacity support quality improvement science principles and processes in Inflexion's work with secondary schools through a virtual networked professional learning approach. Over the course of the grant Inflexion worked with 50 secondary schools in three California specific cohorts (75,000 students, 75.5% qualify for free and reduced meals, 17.8% our English Learners, over 70% identify as Latinx or Black). Schools created vision for readiness and statements of identity, aligned structures and approaches to learning, and focused on implementing key features of a multi-tiered system of support to ensure every student is ready for their future.

Pre-AP Positive Deviant Study (2019 – 2020). Inflexion led a study focused on the the key factors that influence high quality implementation of the Pre-AP program – a program developed and being piloted by the College Board. The study was structured to

identify key drivers as well as common pathways to successful implementation to further inform the CB's program development and implementation processes. This study will include at least eight pilot sites from across the country. Coleman conceptualizes the work and elements of the Inflexion Approach informed the design of the study.

Oregon Rural School Network (2019 – 2022). This collaboration was built on the existing network through a purposeful partnership with 14 Oregon school districts, the Oregon Rural Network coaches (11 retired educators with a combined 374 years of experience, including 176 years in administration roles), and Inflexion. In this partnership, Oregon Rural Schools Network coaches are placed in schools and supported by Inflexion staff using the Inflexion Approach as a school change model to anchor the coaching and school based work. Matt envisioned the collaboration and formed the partnership with the Oregon Rural Network. Inflexion served as the fiscal sponsor of the collaborative.

AVID Positive Deviant Study (2018 – 2020) Inflexion studied the effect of high quality schoolwide AVID implementation in eight exemplar sites on both elective and non-elective students with the intent to inform efforts to accelerate schoolwide implementation in AVID schools across the country. The study was structured to identify key drivers as well as common pathways to successful schoolwide implementation to both validate and inform AVID's existing Path to Schoolwide strands. Most importantly, the study provided evidence supporting the need and effect of AVID Schoolwide while highlighting key factors capable of accelerating and sustaining high quality implementation. Matt conceptualized the work and helped frame the study.

California Culture and Climate Design Team and Pilot (2018-2020) In partnership with the Orange County Department of Education and the Center for the Transformation of Schools at UCLA, Inflexion facilitated a design process that included over 50 key partners (students, teachers, administrators, county office staff, advocacy groups, university faculty, family engagement specialist, and several nationally recognized organizations). Through the design process, an approach to support school level implementation of MTSS and to produce the necessary conditions and climate for learning was developed. This approach was implemented in schools across California including 14 pilot sites, as well as over 30 *proof of concept* sites. Inflexion provided technical coaching support to all of the secondary sites in the project. Matt provided the facilitation of the design team and was the lead coach for the secondary pilot and proof of concept sites in the project.

Hewlett Foundation Research Practice Partnership (2017-2019). In partnership with the Anaheim Union High School District, Matt led the effort to secure a $1 million grant from the Hewlett Foundation to scale effective deeper learning practices that lead to student's developing the ability to communicate, collaborate, think critically, develop character, and be creative. This project was one of eight funded through a competitive process that included participation in a design-based work shop at the d-School at Stanford University. The goal of the project was to scale effective practices with the intent to reach the 32,000 students across the district.

California Scale Up MTSS Statewide (2016-2022). In partnership with the Orange County Department of Education and the SWIFT Center at the University of Kansas, Inflexion led secondary school efforts to implement Multi-Tiered Systems of Supports and to scale MTSS across California. Inflexion worked directly with schools across California using Dr. David Conley's Four Keys to College Career Readiness and elements of Social Emotional Learning to operationalize inclusive academic and behavioral skills as part of the MTSS domain in the SWIFT Centers model for high quality MTSS implementation. Matt served as the conceptual leader of the secondary efforts and a lead presenter.

Nike School Innovation Fund (2014-2017). In a technical advisory role, Inflexion served as a "player-coach" in support of Nike's pairing of an executive with 12 high school principals in the greater Portland Metro area. In this role, Matt provided direct consultation, guidance, and facilitation of superintendent, principal and Nike Executive groups. As an organization, we supported strategy development and decision making as Nike supports AVID implementation across the state of Oregon.

California Education Policy Fund (2014-2019). Matt worked with over 20 partner organizations to support the implementation of Deeper Learning in California. The focus was on looking at how state level policy and supports can be successfully leveraged to incorporate non-cognitive skills as a key driver of instructional programs within a comprehensive high school system. This work provided the opportunity for Inflexion to engage multiple county offices (Orange, San Diego, Riverside, and Tulare) and districts from across the state. Further, Inflexion networked with key organizations from across the state representing a diverse range of stakeholders (advocacy groups, research groups, chambers of commerce, etc.).

Technical Assistance – School Improvement Grant – Valley High School (2014-2017). In 2014, Inflexion was selected to provide technical assistance to Valley High School in the Santa Ana Unified School District. The TA contract was part of the school's School Improvement Grant. Over a three-year period, Matt provided direction and oversight as well as direct consultation to the school's administrative team and a handful of contracted service providers. The focus of the technical assistance in the areas of literacy, PBIS, leadership capacity building, career pathways, and college and career readiness. The work, over a three-year period, resulted in an increase in graduation rates from 78% to 89% and the school being lifted out of improvement status.

TeachOregon, Springfield Public Schools, University of Oregon and Pacific University (2012-2014). Matt led the design and initial implementation of the TeachOregon project, a grant supported by funding from the Oregon Department of Education and the Paul G. Allen Foundation. The aim of this project was to provide alternate pathways to teaching designed to support and ultimately increase the number of culturally diverse teachers within the state of Oregon. This project included a partnership with Pacific University

and the University of Oregon's College of Education. The first graduates of this program received their teaching licenses in 2015 and are teaching in schools within Lane County.

Oregon Collaboration Grant (2012-14) Matt led the development and implementation of this competitive grant which provided nearly $2,000,000 to the Springfield Public Schools to support collaborative work between the district and the union to (a) enhance teacher leadership, (b) support innovative professional learning opportunities, (c) restructure the educator evaluation systems, and (d) develop a new teacher compensation model. This grant supported innovation across the district (K-12) and included the development and implementation of a collaborative leadership model at the district and school level that drove professional development opportunities (design and delivery). The professional development opportunities were incorporated into the districts evaluation plan that supported a potential shift in the salary schedule to allow for district professional development and school-based leadership opportunities to advance teachers horizontally across the salary schedule (rather than based only on college credits).

Small Learning Community Grant (2010 Cohort). As the secondary director in the Springfield Public Schools, Matt worked collaboratively with the Educational Policy Improvement Center to develop and deliver an SLC grant for Springfield and Thurston High School. This grant focused on college and career readiness and specifically on supporting teaming structures at the ninth and tenth grade, career pathway development, intervention supports, and framing quality instruction with the Four Keys to College and Career Readiness. Grant efforts realized a significant reduction in drop-out rates, an increase in high school completion, increased advanced program opportunities and a significant reduction in the achievement disparities between historically underserved students and white students.

Small Learning Community Grant (2005 Cohort). As the project director, Matt oversaw a U.S. Department of Education SLC grant in his role as principal at Westview High School. This grant included the implementation of PBIS, development of a house structure for ninth and tenth grade students, implementation of culturally-specific supports for historically underserved student groups, and a focus on instructional practices designed to ensure student readiness for post-secondary education. Grant efforts resulted in a significant reduction in behavior, increased participation in advanced programs, increased graduation rates, and a significant impact on advanced program participation (from 2% to 35%) and behavioral referrals (from 42% to 9%) for Black and Latino students (over 400 students).

Presentations

Coalition of Oregon School Administrators, Equity Conference (February, 2025). Systemic Equity in Education: Practical Strategies for Inclusive Learning and Engagement.

California Multi-Tiered System of Support Professional Learning Institute (July, 2024). Featured presenter providing seven sessions over the three-day conference focused on secondary MTSS.

California City School Districts Spring Conference Keynote (June 2024). 21st Century Instructional Design.

California Multi-Tiered System of Support Professional Learning Institute (July, 2023). Featured presenter providing five sessions over the three-day conference focused on secondary MTSS.

California Multi-Tiered System of Support Professional Learning Institute (July, 2022). Featured presenter providing five sessions over the three-day conference focused on secondary MTSS.

Merced Union High School District (August 2020). Overview of the CA MTSS Implementation Tool for all school and district administrators.

Brea-Olinda Unified School District – 2019-20 Conference (August, 2019). Provided workshops for educators within the district focused on the role identity and a shared vision for readiness play in effective schools; engaging students, families, and community; and the Inflexion Approach.

Three Rivers School District (August, 2019). The Role School Identity and a Shared Vision for Readiness Play in Effective Schools.

Professional Learning Institute (July, 2019). Supported the development of the annual CA MTSS conference hosted by the Orange County Department of Education. Provided five sessions specific to MTSS implementation at the secondary level.

Vista Unified School District (June, 2019). Led full day workshop with four sites and key district staff specific to the CA MTSS Implementation Tool for all school and district administrators.

Three Rivers School District (June, 2019), The Role School Identity and a Shared Vision for Readiness Play in Effective Schools.

Junction City School District (May, 2019), The Role School Identity and a Shared Vision for Readiness Play in Effective Schools.

OCDE-UCLA Center for School Transformation (Feb - May, 2019), Design Team Facilitation.

CCSSO-ILN Conference, California Department of Education (May 2019), Innovative Lab Network Convening – Member of CDE Team.

Oregon Rural School Network Convening (May, 2019), The Role School Identity and a Shared Vision for Readiness Play in Effective Schools.

Orange County Department of Education Conference on Serving Black and Latino Young Men (May, 2019), Colloquium Presentation on School Based Strategies including a Student Panel.

Anaheim Union High School District and Orange County Department of Education Convening (April, 2019). Facilitated a sense making protocol with over 200 participants as part of a full day convening focused on the future of education.

Anaheim Union High School District (April, 2019), MTSS Training Specific to Positive Behavior Interventions and Support.

California County Superintendents Educational Services Association, Curriculum and Instruction Steering Committee (CISC), CISC Leadership Symposium (February, 2019) Aligning Your Multi-Tiered System of Support to a Shared Vision of Student Readiness.

Hewlett Education Convening, *Savannah, Georgia (February, 2019),* Focus on Research Practice Partnership.

Santiam Canyon School District, (February, 2019), Life Ready Maxims Presentation and Workshop.

Anaheim High School (February, 2019), External Stakeholder Engagement Visioning Day.

Anaheim Union High School District (January, 2019), MTSS Training Specific to Positive Behavior Interventions and Support.

Vista Unified School District, (December, 2018), MTSS Collaboration for District Implementation.

Anaheim Union High School District (December, 2018), 5C's Work Session Facilitation.

Oregon Rural Schools Network (November, 2018), External Coach Professional Learning Specific to the Inflexion Approach.

College Board Forum with Orange County Department of Education (October, 2018), Social-Emotional Wellness and College and Career Readiness.

AVID Australia Leadership Tour (October, 2018), Facilitated a Design Session with School Leaders from Australia and the Beaverton School District.

Research Practice Partnership Convening, Hewlett Foundation (October, 2018). Participated in convening with our partners from Anaheim Union High School District and presented our work to date to all convening participants.

Denver Public Schools, Instruction Department (October, 2018), Introduced the Inflexion Approach to all secondary administrators in the Denver Public Schools.

Merced Union High School District (September, 2018), Implementing MTSS at the Secondary Level.

Anaheim Union High School District (September, 2018), Schoolwide Positive Behavior Intervention Support workshop for all AUHSD sites.

Denver Public Schools, Instruction Department (September, 2018), Introduced key members of the instruction department to the Inflexion Approach and facilitated a design-based process to contextualize the approach to the Denver Public Schools.

Temple City Unified School District (September 2018), Implementing MTSS at the Secondary Level with Temple City High School and Oak Avenue Middle School.

Santiam Canyon School District (August, 2018), Developing a Shared Vision for Readiness and Identity – launch with all district staff.

Anaheim Union High School District (May, 2018), co-facilitated the Local Education Association self-assessment in partnership with the Orange County Department of Education.

Orange County Department of Education (April, 2018), Facilitated a process focused on developing a shared set of outcomes for the Instruction Division within OCDE.

North Orange County Community College District (March, 2018), Integrated Planning Summit - design support and facilitation.

California County Superintendents Educational Services Association, Curriculum and Instruction Steering Committee (CISC), CISC Leadership Symposium (February, 2018) The Four Keys to Readiness: Implementing a Holistic Vision or All Students.

GEAR UP National Conference (February, 2018) Building Schools that Work for All Students.

AVID Australia National Conference (November, 2017) Keynote, We and Me.

Merced Union High School District (October, 2017) Implementing MTSS at the Secondary Level.

Orange County Department of Education (October, 2017) California SUMS – MTSS Overview.

Anaheim Union High School District (September, 2017) Implementing MTSS at the Secondary Level.

Huntington Beach Union High School District (August, 2017) Implementing MTSS at the Secondary Level.

California SUMS Professional Learning Institute (July, 2017) Using MTSS for Secondary Education.

Saddleback Valley Unified School District (June, 2017) The Four Keys: Developing a Shared Understanding.

California County Superintendents Educational Services Association, Curriculum and Instruction Steering Committee (CISC), CISC Leadership Symposium (February, 2017) Rethinking Readiness – Keynote Address.

GEAR UP National Conference (February, 2017) The Four Keys to College and Career Readiness – Applying Research to Action.

College Board Western Forum (February, 2017) The Four Keys: Developing a Shared Understanding.

Saddleback Valley Unified School District (January, 2017) Strategic Mapping for Decision Making – District Focus.

AVID National Conference (December, 2016) The Four Keys: Developing a Shared Understanding.

San Diego County Office of Education Equity Symposium (September, 2016) School Success Model – Ensuring Readiness for All.

Silicon Valley Education Foundation – East Side Alliance (August, 2016) Elevating Achievement Through Innovation – Facilitated Superintendents Retreat.

Everett Public Schools (August, 2016) Strategic Mapping for Decision Making.

Anaheim Elementary School District (August, 2016) Branding & Schools: An Introduction to Shaping Your Campus' Culture Through Awareness Campaigns.

Anaheim Union High School District (July, 2016) Branding & Schools: An Introduction to Shaping Your Campus' Culture Through Awareness Campaigns.

Carnegie Foundation (June, 2016) EPIC's Policy Work in California and It's School Partnership and Networking Program. Co presented with Dr. David Conley.

Orange County Department of Education (May, 2016) Branding & Schools: An Introduction to shaping your campus' culture through awareness campaigns.

San Diego County Office of Education (May, 2016) Embedding a Culture of College and Career Readiness Throughout Your School.

AVID National Conference (December, 2015) Accelerating School-Wide Implementation.

Tulare County Office of Education. (December, 2015) Measuring College and Career Readiness.

Hawaii College Access Network (September, 2015) Empowering Community, Career, and College Readiness.

Spokane Public Schools – AVID Conference and All Administrator Retreat (July, 2015). Moving the finish line: Empowering community, career, and college readiness.

Hawaii College Access Network (April, 2015) Empowering Community, Career, and College Readiness.

Northwest PBIS Conference (March, 2015). Making It Stick.

Riverside County Office of Education College and Career Readiness Symposium (March 2015). Building Schools that Empower Students for College and Career.

College Board – Western Regional Forum (February, 2015) The Four Keys School Model – Realizing College and Career Readiness for All.

Ventura County Office of Education (February, 2015) Getting Ready for College, Careers and the Common Core. Co-presented with Dr. David Conley.

AVID National Conference (December, 2014) The Four Keys School Model – Realizing College and Career Readiness for All.

Dorothy Lund

Staunton, VA · 760.473.5206 · didi.lund@gmail.com · in/didilund

Professional Experience

BrightBug Marketing **Staunton, VA**
Marketing & Communications Consultant 2020- Present

- Lead strategic communications, branding, and digital strategy initiatives across diverse industries, aligning market positioning and audience narratives with institutional missions and stakeholder goals.
- Develop and execute integrated communications plans spanning content, digital, and community channels; ensure message consistency and accessibility across owned, earned, and paid media.
- Define brand architecture and messaging frameworks; create governance systems for content, design, and digital publishing that strengthen brand integrity and cross-cultural reach.
- Partner with leadership to translate complex institutional goals into clear public narratives; manage multi-channel campaign planning, audience segmentation, and performance measurement.
- Design and oversee full-funnel media campaigns (Google Ads, Meta, programmatic), integrating communication strategy with data analytics to drive awareness and conversion.
- Build and operationalize content and SEO programs that elevate brand visibility and trust; implement analytics dashboards (GA4, GTM, Looker Studio) to inform decision-making and stakeholder reporting.
- Lead cross-functional collaboration between creative, content, and executive teams; establish KPIs, reporting protocols, and data-informed storytelling for internal and external audiences.
- Manage communication budgets and external partnerships to ensure responsible resource use and measurable return on engagement.
- Direct community engagement and donor communications campaigns to expand visibility, inclusion, and mission alignment.

Selected Client Results:

Middle River Outfitters | Fractional Director of Marketing & Communications | Outdoor recreation
- Refined brand positioning and public storytelling around conservation and local tourism; strengthened reputation through digital storytelling and PR.
- Increased revenue 80–110% YoY while reducing ad spend by 34% through targeted communication strategies and audience insights.

Foxden Equine | Content & Organic Digital Marketing Manager | Equine nutrition
- Delivered YoY lifts in sales (+53%), orders (+75%), conversion rate (+80%), and traffic (+484%).
- Built and executed an SEO-driven content marketing strategy driving 68.5K search sessions; aligned content with on-site merchandising for hero SKUs and optimized the mobile content-to-cart flow, supporting the conversion lift.
- Led the DTC marketing strategy, resulting in product revenue from 0 to $600k within 4 years.

Habitual Sleepers | Brand & Communications Strategist | Sleep Consulting
- Built the Habitual Sleepers brand from concept to a trusted voice in responsive, science-based pediatric sleep.
- Developed all communications, messaging, and digital positioning strategies; created brand tone and visual identity to emphasize empathy, expertise, and evidence-based guidance.
- Designed and developed the full website and SEO architecture, integrating content strategy with user experience and conversion optimization.
- Grew annual revenue by over 435% within two years through positioning, audience trust, and sustained digital communications performance.

Valley Business Keynote | Marketing Chair | Regional business leadership nonprofit

- Grew ticket revenue by 85% and paid attendance by 45%, establishing VBK as Shenandoah Valley's largest business event with full paid capacity and sponsor allotment.
- Built and led a standing team of volunteers for audience development and event operations; owned marketing plan, sponsor-coordination materials, ticketing strategy, and post-event stewardship.

Inflexion | Rebranding Strategist | National education nonprofit

- Guided the WordPress relaunch of Inflexion.org, coordinating with developers on Bricks Builder handoff, plugin cleanup, and data preservation; improved information architecture, accessibility, and on-page SEO; produced clear marketing copy to align programs with audience needs.

PK Horsemanship **Grottoes, VA**
Partner & Events Director 2012- 2020

- Built a global events and content brand from grassroots origins to international reach across 35 states and three continents. Managed multi-channel marketing, sponsorships, and event operations while supervising staff and volunteers.
- Pioneered a cutting-edge growth marketing strategy by launching a podcast, programming a YouTube series, formalizing an Instagram strategy, and building Facebook Groups with regular Live sessions, converting engagement into clinic demand and creating an owned audience that boosted discoverability and sustained year-round demand for tours and programs.
- Expanded the event footprint from a single city to a global presence across 35 states and three continents by building a repeatable event model, securing host venue partnerships, and driving multi-channel promotion.
- Owned end-to-end event lifecycle including calendar planning, host agreements, sponsor outreach and fulfillment, ticketing communications, and on-site run of show.

Skills

- WordPress administration
- UTM governance and QR tracking
- Google Ads and Meta Ads
- Content Marketing
- Analytics & data science
- Content creation & editing
- Managing & leading teams
- Market research & audience segmentation
- GA4 and Google Tag Manager
- Looker Studio dashboards
- Spanish language advertising
- SEO optimization
- Event marketing
- Media buying
- WordPress & web governance
- Accessibility standards

Education

The Ohio State University **May 2010**
M.A. Political Science (focus on Game Theory, Econometrics, and Data Science)

California State University San Marcos **May 2006**
B.A. Political Science, minor in Spanish

Curtis L. Sell

Graphic Designer/Art Director with extensive experience in multimedia, marketing and print design. Exceptional collaborative and interpersonal skills; enthusiastic team player with well-developed written and verbal communication abilities; skilled in client and vendor relations; talented at building and maintaining partnerships; passionate and inventive creator of marketing strategies and campaigns; accustomed to performing in a deadline-driven environment working within budget requirements. Creative experience in the following:

P R I N T
- Brochures
- Book Covers
- Promotional flyers
- Product packaging
- Newsletters
- Print ad campaigns

P R O M O T I O N A L
- Screen printing
- Embroidery
- T-shirts
- Posters
- Client gift packages
- Press releases

M U L T I M E D I A
- Television graphics
- Video graphics
- Web graphics
- PowerPoint presentations

P R O F E S S I O N A L E X P E R I E N C E

Inflexion (formerly EPIC) · Eugene/Portland, Oregon *Senior Graphic Designer (2015-present)*
In-house graphic designer responsible for all visual materials; print, presentation, and electronic. Working directly with partner schools and districts leading branding workshops, community engagement sessions, as well as providing design and consultation services.

Curt Sell Design · Aloha, Oregon *Self Employed Freelance Graphic Designer (1997-2015)*
As a freelance graphic designer, duties encompassed every aspect of a design business utilizing such programs as Adobe Photoshop, Adobe InDesign, and Macromedia Freehand.

Responsibilities included: marketing for new clients; conducting sales calls; managing work flow; software and hardware troubleshooting; bookkeeping; strategizing and problem solving with clients; guiding clients through the design process from proof to final product; photography; outsourcing vendors; and print management.

Aloha High School · Aloha, Oregon *School to Career Assistant (2003-2004)*
Responsible for giving the program a facelift, marketing it to students and staff, creating interesting visuals, updating the job shadow tracking process, and coordinating job shadows for students.

Pinpoint Graphics · Beaverton, Oregon *Lead Designer (1990-97)*
Responsible for design, taking projects from conception to completion. Projects included design projects such as company branding, medical forms and brochures, event posters, and product packaging.

Provided project final approvals for other design staff. Served as Art Director for photo-shoots. Often required to write advertising copy. Outsourced photographers and illustrators and managed their contribution to projects.

Central Point Software · Portland, Oregon *Advertising and Marketing Assistant (1986-90)*
Helped design and produce everything from in-house forms and reports to packaging and advertisements. Spearheaded the transition from manual light table design to computer graphics as the industry evolved to digital. Other responsibilities included generating the marketing reports which tracked advertising effectiveness.

E D U C A T I O N

Multnomah University · Portland, Oregon *(1990-91)* Focus of study: Adolescent Psychology
California Baptist University · Riverside, California *(1982-84)* Focus of study: Social Science
Warner Pacific College · Portland, Oregon *(1981-82)* Focus of study: Music / General Education

Appendix D: Sample Risk Register

Risk ID	Category	Risk Description	Likelihood	Impact	Mitigation Strategy	Monitoring Indicator	Responsible Party
R1	Schedule	Compressed timelines during competitive grant proposal development may limit time for drafting, review, and institutional approvals.	Medium	High	Use back-planning schedules, early concept development, and staged draft deadlines to maintain momentum toward submission.	Missed internal drafting milestones or delayed contributor input.	Principal Investigator / Project Manager
R2	Coordination	Scheduling challenges when coordinating meetings or collaborative work sessions across multiple researchers and institutional partners.	Medium	Medium	Establish regular standing meetings, shared planning calendars, and clear milestone schedules early in the project.	Difficulty scheduling meetings or delayed responses from collaborators.	Project Manager

Risk ID	Category	Risk Description	Likelihood	Impact	Mitigation Strategy	Monitoring Indicator	Responsible Party
R3	Research Design	Misalignment between proposed research design and sponsor expectations or available data sources.	Low–Medium	High	Conduct early research design reviews and strategy sessions to refine conceptual models and methodological approaches.	Reviewer feedback, internal design review concerns, or sponsor guidance changes.	Lead Researcher
R4	Institutional Process	Delays related to internal grant submission processes or Institutional Review Board (IRB) review for human subjects research.	Low–Medium	Medium	Coordinate early with institutional grant administration and prepare IRB materials during project planning phases.	Institutional review timelines exceeding expectations.	PI / Institutional Liaison
R5	Data Collection	Difficulty recruiting representative participants for	Low	Medium	Work with institutional partners to identify recruitment strategies and allow	Low response rates or underrepresentation of key participant groups.	Research Team

Risk ID	Category	Risk Description	Likelihood	Impact	Mitigation Strategy	Monitoring Indicator	Responsible Party
		interviews, focus groups, or surveys.			flexible scheduling for participants.		
R6	External Conditions	Changes in sponsor priorities, institutional conditions, or external events affecting project timelines or research implementation.	Low	Medium	Maintain adaptive project management processes and adjust work plans as needed.	Sponsor guidance updates or partner availability changes.	PI / Project Leadership

ATTACHMENT A

OFFEROR DATA SHEET

TO BE COMPLETED BY OFFEROR

1. QUALIFICATIONS OF OFFEROR: Offerors must have the capability and capacity in all respects to fully satisfy the contractual requirements.

2. YEARS IN BUSINESS: Indicate the length of time you have been in business providing these types of goods and services.

   Years 23 Months 5

3. REFERENCES: Indicate below a listing of at least five (5) organizations, either commercial or governmental/educational, that your agency is servicing. Include the name and address of the person the purchasing agency has your permission to contact.

CLIENT	LENGTH OF SERVICE	ADDRESS	CONTACT PERSON/PHONE #
International Baccalaureate	16 years	Churchillplein 6 2517 JW The Hague, The Netherlands	Sarah Manlove +31 70 352 6000
Orange County Department of Education	10 years	200 Kalmus Dr, Costa Mesa, CA 92626	Steven Kahn (714) 966-4115
Santa Clara County Office of Education	3 years	1290 Ridder Park Dr. San Jose, CA 95131	Corrine Frese (408) 573-4771
Lane Education Service District	1 year, 2 months	1200 State Hwy 99 N, Eugene, OR 97402	Dr. Casey Reid (816) 965-7943
James Madison University	10 months	800 South Main Street Harrisonburg, VA 22807	Dr. Maryam Sharifian (540) 568-5537

4. List full names and addresses of Offeror and any branch offices which may be responsible for administering the contract.

   Educational Policy Improvement Center, dba Inflexion

   PO Box 5465, Eugene, OR 97405

   Oregon headquarters administering contract; Inflexion has distributed staff in multiple states including a Virginia-based senior researcher.

5. RELATIONSHIP WITH THE COMMONWEALTH OF VIRGINIA: Is any member of the firm an employee of the Commonwealth of Virginia who has a personal interest in this contract pursuant to the CODE OF VIRGINIA, SECTION 2.2-3100 – 3131?
   [ ] YES [X] NO
   IF YES, EXPLAIN: _____

ATTACHMENT B

Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

Offeror Name: Educational Policy Improvement Center, dba Inflexion **Preparer Name:** Matt Coleman

Date: 03/09/2026

Is your firm a **Small Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes_____ No_X___

If yes, certification number: _____ Certification date:_____

Is your firm a **Woman-owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes_____ No_X___

If yes, certification number: _____ Certification date:_____

Is your firm a **Minority-Owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes____ No_X___

If yes, certification number: _____ Certification date:_____

Is your firm a **Micro Business** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes_____ No_X___

If yes, certification number: _____ Certification date: _____

Instructions: *Populate the table below to show your firm's plans for utilization of small, women-owned and minority-owned business enterprises in the performance of the contract. Describe plans to utilize SWAMs businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.*

Small Business: "Small business " means a business, independently owned or operated by one or more persons who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of $10 million or less averaged over the previous three years.

Woman-Owned Business Enterprise: A business concern which is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more women, and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified women-owned businesses are also a small business enterprise.**

Minority-Owned Business Enterprise: A business concern which is at least 51 percent owned by one or more minorities or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more minorities and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified minority-owned businesses are also a small business enterprise.**

Micro Business is a certified Small Business under the SWaM Program and has no more than twenty-five (25) employees **AND** no more than $3 million in average annual revenue over the three-year period prior to their certification.

All small, women, and minority owned businesses must be certified by the Commonwealth of Virginia Department of Small Business and Supplier Diversity (SBSD) to be counted in the SWAM program. Certification applications are available through SBSD at 800-223-0671 in Virginia, 804-786-6585 outside Virginia, or online at http://www.sbsd.virginia.gov/ (Customer Service).

RETURN OF THIS PAGE IS REQUIRED

ATTACHMENT B (CNT'D)

Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

Procurement Name and Number: Grant Proposal Development and Consulting Services - RFP # SLD-1247 Date Form Completed: 03/09/2026

Listing of Sub-Contractors, to include, Small, Woman Owned and Minority Owned Businesses for this Proposal and Subsequent Contract

Offeror / Proposer:

Educational Policy Improvement Center, dba Inflexion (Firm) | PO Box 5465 Eugene, OR 97405 (Address) | Matt Coleman (541) 246-2600 (Contact Person/No.)

Sub-Contractor's Name and Address	Contact Person & Phone Number	SBSD Certification Number	Services or Materials Provided	Total Subcontractor Contract Amount (to include change orders)	Total Dollars Paid Subcontractor to date (to be submitted with request for payment from JMU)
N/A					

(Form shall be submitted with proposal and if awarded, a SWaM Sub-contractor Reporting Form shall be submitted to swamreporting@jmu.edu)

RETURN OF THIS PAGE IS REQUIRED

JAMES MADISON UNIVERSITY

Request for Proposal

RFP# SLD-1247

Grant Proposal Development and Consulting Services

February 12, 2026

VIRGINIA ASSOCIATION OF STATE COLLEGE & UNIVERSITY PURCHASING PROFESSIONALS

VASCUPP

REQUEST FOR PROPOSAL
RFP# SLD-1247

Issue Date: **February 12, 2026**

Title: **Grant Proposal Development and Consulting Services**

Issuing Agency: **Commonwealth of Virginia**
James Madison University
Procurement Services MSC 5720
752 Ott Street, Wine Price Building
First Floor, Suite 1023
Harrisonburg, VA 22807

Period of Contract: From Date of Award Through One Year (Renewable)

Sealed Proposals Will Be Received Until 2:00 PM on March 11, 2026 for Furnishing The Services Described Herein. (See Special Terms & Conditions "D. Late Proposals")

SEALED PROPOSALS MAY BE MAILED, EXPRESS MAILED, SUBMITTED IN eVA, OR HAND DELIVERED DIRECTLY TO THE ISSUING AGENCY SHOWN ABOVE.

All Inquiries For Information And Clarification Should Be Directed To: Shanna Devers, Lead Commodity Contract Officer, Procurement Services, deverssl@jmu.edu; 540-568-3131; (Fax) 540-568-7935 not later than five business days before the proposal closing date.

NOTE: THE SIGNED PROPOSAL AND ALL ATTACHMENTS SHALL BE RETURNED.
In compliance with this Request for Proposal and to all the conditions imposed herein, the undersigned offers and agrees to furnish the goods/services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

Name and Address of Firm:

_____

_____

_____

By: _____
(Signature)

Name: _____
(Please Print)

Date: _____ Title: _____

Web Address: _____ Phone: _____

Email: _____ Fax #: _____

ACKNOWLEDGE RECEIPT OF ADDENDUM: #1_____ #2_____ #3_____ #4_____ #5_____ (please initial)

SMALL, WOMAN OR MINORITY OWNED BUSINESS:
☐ YES; ☐ NO; *IF YES* ⇒⇒ ☐ SMALL; ☐ WOMAN; ☐ MINORITY ***IF MINORITY***: ☐ AA; ☐ HA; ☐ AsA; ☐ NW; ☐ Micro

Note: This public body does not discriminate against faith-based organizations in accordance with the *Code of Virginia*, § 2.2-4343.1 or against an offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.

REQUEST FOR PROPOSAL

RFP # SLD-1247

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A. Offeror Data Sheet
B. SWaM Utilization Plan
C. Sample of Standard Contract
D. Zone Map

I. PURPOSE

The purpose of this Request for Proposal (RFP) is to solicit sealed proposals from qualified sources to enter into a contract to provide Grant Proposal Development and Consulting Services for James Madison University (JMU), an agency of the Commonwealth of Virginia. Initial contract shall be for one (1) year with an option to renew for four (4) additional one-year periods.

II. BACKGROUND

James Madison University (JMU) is a comprehensive public institution in Harrisonburg, Virginia with an enrollment of approximately 23,000 students and approximately 4,000 faculty and staff. There are over 600 individual departments on campus that support seven (7) academic divisions. The University offers over 120 majors, minors, and concentrations. Further information about the University can be found at the following website: www.jmu.edu.

The JMU Center for Advancement Research in Education (JMU CARE™), housed in the College of Education (COE), advances interdisciplinary, evidence-based research and practice focused on equitable, high-quality early childhood development through the lifespan. CARE convenes faculty, staff, student, educators, families, and community partners to investigate challenges, develop interventions, and inform policy and practice through research, training, and dissemination.

III. SMALL, WOMAN-OWNED AND MINORITY PARTICIPATION

It is the policy of the Commonwealth of Virginia to contribute to the establishment, preservation, and strengthening of small businesses and businesses owned by women and minorities, and to encourage their participation in State procurement activities. The Commonwealth encourages contractors to provide for the participation of small businesses and businesses owned by women and minorities through partnerships, joint ventures, subcontracts, and other contractual opportunities. Attachment B contains information on reporting spend data with subcontractors.

IV. STATEMENT OF NEEDS

A. James Madison University CARE/COE seeks to engage with a qualified and experienced firm(s) for grant development, strategic thought partnership, capacity building, and project implementation and evaluation. Services include grant proposal development, technical assistance, interdisciplinary research support, and utilization-focused evaluation.

B. Offerors shall provide a detailed response to the following:

1. Describe your firm's capacity to deliver the service areas as indicated above. Include team size, core roles, and availability during peak periods.

2. Describe any prior work with other higher education institutions, highlighting strategic planning, technical assistance, or evaluation engagements.

3. Summarize your firm's experience forming and sustaining cross-institutional or international partnerships.

4. Demonstrate your ability to provide a senior researcher based or regularly available in the Harrisonburg, VA area to support on-site data collection.

5. Explain your approach to opportunity scanning, fit assessment, timeline back-planning, and integration with JMU CARE/COE priorities.

6. Describe your processes for narrative drafting, budget creation, compliance crosswalks, and submission support.

7. Detail facilitation techniques for strategy sprints, decision framing, and issue analysis; how will your firm balance constructive critique with capacity building?

8. Outline your approach to strengthening research methods, project management, and knowledge systems. Provide sample curricula and materials.

9. Describe your methods for research design, logic models, instrument development, sampling, IRB readiness, data collection & analysis, and utilization-focused reporting.

10. Explain how your firm ensures accessibility and inclusive design across reports, tools, trainings, and web-based materials integral to project deliverables.

11. Describe how your firm estimates hours for discrete tasks and multi-stream projects, the inputs required from JMU, and your assumptions.

12. Provide your approach to schedule development, milestone tracking, and risk management.

13. Detail the cadence and format of status meetings, progress summaries, and documentation; your collaboration tools and responsiveness standards.

14. Identify key personnel (e.g., Principal/Lead Strategist, Senior Researcher—Harrisonburg/on-site, Grants Specialist, Methodologist, Project Manager, Data Analyst, Communications Lead). Provide resumes and percent allocation.

15. Explain your contingency coverage model for key personnel absences to maintain continuity of deliverables and on-site data collection.

16. Describe ongoing training for project staff assigned to JMU.

17. Provide examples (or anonymized excerpts) of grant narratives, budgets, strategic plans, research designs, logic models, evaluation plans, data instruments, analyses, and visualizations you have produced.

18. Describe your editorial, technical, accessibility, and methodological QA processes.

19. Explain how your firm organizes and archives project artifacts to enable sustainability and handoff to JMU teams.

20. Summarize your firm's data management plans (security, privacy, retention, access controls), including how FERPA-adjacent education data and research data management is handled.

21. Describe your firm's familiarity with IRB processes and responsible conduct of research training for staff supporting data collection/evaluation.

22. If proposing hosted solutions or storage, describe environments, backup/DR, encryption, and admin controls; include optional costs.

23. Identify typical risks and your mitigation strategies. Provide a sample risk register.

24. Describe your plan for project start-up and wind-down, including transfer of knowledge, files, and documentation to JMU to support sustainability.

25. Describe your approach to identifying, escalating, and resolving issues or defects that arise during the project or within project deliverables

26. Provide comprehensive pricing for proposed services in Section X. Pricing Schedule.

V. PROPOSAL PREPARATION AND SUBMISSION

A. GENERAL INSTRUCTIONS

To ensure timely and adequate consideration of your proposal, offerors are to limit all contact, whether verbal or written, pertaining to this RFP to the James Madison University Procurement Office for the duration of this Proposal process. Failure to do so may jeopardize further consideration of Offeror's proposal.

ELECTRONIC OR PAPER SUBMISSIONS MAY BE ACCEPTED FOR THIS PROPOSAL. INSTRUCTIONS BELOW FOR OFFEROR'S CHOSEN METHOD (A. ELECTRONIC SUBMISSION or B. PAPER RESPONSE).

1. RFP Response: In order to be considered for selection, the **Offeror shall submit a complete response to this RFP**; and shall submit to the issuing Purchasing Agency:

    a. **ELECTRONIC SUBMISSION**:

        i. ELECTRONIC RESPONSES SUBMITTED THROUGH eVA WILL BE ACCEPTED. **Emailed responses will not be accepted.** Please see below, "eVA Procurement Website and Registration" for additional information on registration. It is the responsibility of the Supplier to ensure their proposal and all required documentation is properly completed, readable, and uploaded to eVA. Suppliers should allow sufficient time to account for any technical difficulties they may encounter during online submission or uploading of the documents. In the event of any technical difficulties, Suppliers shall contact the eVA Customer Care Center at 1-866-289-7367 or via email at eVACustomerCare@DGS.virginia.gov.

        ii. eVA Procurement Website and Registration The Commonwealth's procurement portal, eVA, located at http://www.eva.virginia.gov, provides information about Commonwealth solicitations and awards. Suppliers shall be registered in eVA in order submit a proposal to this RFP. To register with eVA, select "Register Now" on the eVA website homepage, http://www.eva.virginia.gov. For registration instructions and assistance, as well as instructions on how to submit proposals and accept orders please select "I Sell to Virginia". Suppliers are encouraged to check this site on a regular basis and, in particular, prior to submission of proposals to identify any amendments to the RFP that may have been issued.

iii. Electronic Responses submitted through eVA shall be in WORD format or searchable PDF of the entire proposal, INCLUDING ALL ATTACHMENTS. PDFs must be submitted in an unlocked format. Any proprietary information should be clearly marked in accordance with Section V.4.f. below.

b. **PAPER SUBMISSIONS:**

i. **One (1) original** and **two (2) copies** of the entire proposal, INCLUDING ALL ATTACHMENTS. Any proprietary information should be clearly marked in accordance with V.4.e. below.

ii. **One (1) electronic copy in WORD format or searchable PDF** (*CD or flash drive*) of the entire proposal, INCLUDING ALL ATTACHMENTS. Any proprietary information should be clearly marked in accordance with Section V.4.f. below.

iii. Each copy of the proposal should be bound or contained in a single volume where practical. All documentation submitted with the proposal should be contained in that single volume.

iv. See additional information in Section VIII.C, *IDENIFICATION OF PROPSAL ENVELOPE*.

2. Should the proposal contain **proprietary information**, **provide one (1) redacted copy of the proposal** and all attachments with **proprietary portions removed or blacked out**. This copy should be clearly marked *"Redacted Copy"* on the front cover. The classification of an entire proposal document, line-item prices, and/or total proposal prices as proprietary or trade secrets is not acceptable. JMU shall not be responsible for the Contractor's failure to exclude proprietary information from this redacted copy.

   No other distribution of the proposal shall be made by the Offeror.

3. The version of the solicitation issued by JMU Procurement Services, as amended by an addenda, is the mandatory controlling version of the document. Any modification of, or additions to, the solicitation by the Offeror shall not modify the official version of the solicitation issued by JMU Procurement services unless accepted in writing by the University. Such modifications or additions to the solicitation by the Offeror may be cause for rejection of the proposal; however, JMU reserves the right to decide, on a case-by-case basis in its sole discretion, whether to reject such a proposal. If the modification or additions are not identified until after the award of the contract, the controlling version of the solicitation document shall still be the official state form issued by Procurement Services.

4. Proposal Preparation

   a. Proposals shall be signed by an authorized representative of the Offeror. All information requested should be submitted. Failure to submit all information requested may result in the purchasing agency requiring prompt submissions of missing information and/or giving a lowered evaluation of the proposal. Proposals which are substantially incomplete or lack key information may be rejected by the purchasing agency. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.

b. Proposals shall be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.

c. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite the paragraph number, sub letter, and repeat the text of the requirement as it appears in the RFP. If a response covers more than one page, the paragraph number and sub letter should be repeated at the top of the next page. The proposal should contain a table of contents which cross references the RFP requirements. Information which the offeror desires to present that does not fall within any of the requirements of the RFP should be inserted at the appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed.

d. As used in this RFP, the terms "must", "shall", "should" and "may" identify the criticality of requirements. "Must" and "shall" identify requirements whose absence will have a major negative impact on the suitability of the proposed solution. Items labeled as "should" or "may" are highly desirable, although their absence will not have a large impact and would be useful, but are not necessary. Depending on the overall response to the RFP, some individual "must" and "shall" items may not be fully satisfied, but it is the intent to satisfy most, if not all, "must" and "shall" requirements. The inability of an offeror to satisfy a "must" or "shall" requirement does not automatically remove that offeror from consideration; however, it may seriously affect the overall rating of the offeror' proposal.

e. Each copy of the proposal should be bound or contained in a single volume where practical. All documentation submitted with the proposal should be contained in that single volume.

f. Ownership of all data, materials and documentation originated and prepared for the State pursuant to the RFP shall belong exclusively to the State and be subject to public inspection in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by the offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the offeror must invoke the protection of Section 2.2-4342F of the Code of Virginia, in writing, either before or at the time the data is submitted. **The written notice must specifically identify the data or materials to be protected and state the reasons why protection is necessary. The proprietary or trade secret materials submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document, line-item prices and/or total proposal prices as proprietary or trade secrets is not acceptable. Marking an entire proposal as confidential or attempts to prevent disclosure of pricing information by designating it as confidential, proprietary or trade secret will be ignored.**

5. Oral Presentation: Offerors who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to James Madison University. This provides an opportunity for the Offeror to clarify or elaborate on the proposal. This is a fact-finding and explanation session only and does not include negotiation. James Madison University

will schedule the time and location of these presentations. Oral presentations are an option of the University and may or may not be conducted. Therefore, proposals should be complete.

B. SPECIFIC PROPOSAL INSTRUCTIONS

Proposals should be as thorough and detailed as possible so that James Madison University may properly evaluate your capabilities to provide the required services. Offerors are required to submit the following items as a complete proposal:

1. Return RFP cover sheet and all addenda acknowledgements, if any, signed and filled out as required. (Electronic signature shall be accepted, i.e. Adobe Sign, DocuSign, etc.)

2. Plan and methodology for providing the goods/services as described in Section IV. Statement of Needs of this Request for Proposal.

3. A written narrative statement to include, but not be limited to, the expertise, qualifications, and experience of the firm and resumes of specific personnel to be assigned to perform the work.

4. Offeror Data Sheet, included as *Attachment A* to this RFP.

5. Small Business Subcontracting Plan, included as *Attachment B* to this RFP. Offeror shall provide a Small Business Subcontracting plan which summarizes the planned utilization of Department of Small Business and Supplier Diversity (SBSD)-certified small businesses which include businesses owned by women and minorities, when they have received Department of Small Business and Supplier Diversity (SBSD) small business certification, under the contract to be awarded as a result of this solicitation. This is a requirement for all prime contracts in excess of $100,000 unless no subcontracting opportunities exist.

6. Identify the amount of sales your company had during the last twelve months with each VASCUPP Member Institution. A list of VASCUPP Members can be found at: www.VASCUPP.org.

7. Proposed Cost. See Section X. Pricing Schedule of this Request for Proposal.

VI. EVALUATION AND AWARD CRITERIA

A. EVALUATION CRITERIA

Proposals shall be evaluated by James Madison University using the following criteria:

		Points
1.	Quality of products/services offered and suitability for intended purposes	30
2.	Qualifications and experience of Offeror in providing the goods/services	25
3.	Specific plans or methodology to be used to perform the services	20
4.	Participation of Small, Women-Owned, & Minority (SWaM) Businesses	10
5.	Cost	15
		100

B. AWARD TO MULTIPLE OFFERORS: Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposals, including price, if so stated in the Request for Proposals. Negotiations shall be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, the agency shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. The Commonwealth reserves the right to make multiple awards as a result of this solicitation. The Commonwealth may cancel this Request for Proposals or reject proposals at any time prior to an award, and is not required to furnish a statement of the reasons why a particular proposal was not deemed to be the most advantageous. Should the Commonwealth determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that offeror. The award document will be a contract incorporating by reference all the requirements, terms and conditions of the solicitation and the contractor's proposal as negotiated.

VII. GENERAL TERMS AND CONDITIONS

A. PURCHASING MANUAL: This solicitation is subject to the provisions of the Commonwealth of Virginia's Purchasing Manual for Institutions of Higher Education and Their Vendors and any revisions thereto, which are hereby incorporated into this contract in their entirety. A copy of the manual is available for review at the purchasing office. In addition, the manual may be accessed electronically at http://www.jmu.edu/procurement or a copy can be obtained by calling Procurement Services at (540) 568-3145.

B. APPLICABLE LAWS AND COURTS: This solicitation and any resulting contract shall be governed in all respects by the laws of the Commonwealth of Virginia and any litigation with respect thereto shall be brought in the courts of the Commonwealth. The Contractor shall comply with applicable federal, state and local laws and regulations.

C. ANTI-DISCRIMINATION: By submitting their proposals, offerors certify to the Commonwealth that they will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Contracting Act of 1975, as amended, where applicable, the Virginians With Disabilities Act, the Americans With

Disabilities Act and §10 of the Rules Governing Procurement, Chapter 2, Exhibit J, Attachment 1 (available for review at http://www.jmu.edu/procurement). If the award is made to a faith-based organization, the organization shall not discriminate against any recipient of goods, services, or disbursements made pursuant to the contract on the basis of the recipient's religion, religious belief, refusal to participate in a religious practice, or on the basis of race, age, color, gender, sexual orientation, gender identity, or national origin and shall be subject to the same rules as other organizations that contract with public bodies to account for the use of the funds provided; however, if the faith-based organization segregates public funds into separate accounts, only the accounts and programs funded with public funds shall be subject to audit by the public body. *(§6 of the Rules Governing Procurement*).

In every contract over $10,000 the provisions in 1. and 2. below apply:

1. During the performance of this contract, the contractor agrees as follows:
   a. The contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the contractor. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.

   b. The contractor, in all solicitations or advertisements for employees placed by or on behalf of the contractor, will state that such contractor is an equal opportunity employer.

   c. Notices, advertisements, and solicitations placed in accordance with federal law, rule, or regulation shall be deemed sufficient for the purpose of meeting these requirements.

2. The contractor will include the provisions of 1. above in every subcontract or purchase order over $10,000, so that the provisions will be binding upon each subcontractor or vendor.

D. ETHICS IN PUBLIC CONTRACTING: By submitting their proposals, offerors certify that their proposals are made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other offeror, supplier, manufacturer or subcontractor in connection with their proposal, and that they have not conferred on any public employee having official responsibility for this procurement transaction any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.

E. IMMIGRATION REFORM AND CONTROL ACT OF 1986: By entering into a written contract with the Commonwealth of Virginia, the Contractor certifies that the Contractor does not, and shall not during the performance of the contract for goods and services in the Commonwealth, knowingly employ an unauthorized alien as defined in the federal Immigration Reform and Control Act of 1986.

F. DEBARMENT STATUS: By submitting their proposals, offerors certify that they are not currently debarred by the Commonwealth of Virginia from submitting proposals on contracts for the type of goods and/or services covered by this solicitation, nor are they an agent of any person or entity that is currently so debarred.

G. ANTITRUST: By entering into a contract, the contractor conveys, sells, assigns, and transfers to the Commonwealth of Virginia all rights, title and interest in and to all causes of action it may now have or hereafter acquire under the antitrust laws of the United States and the Commonwealth of Virginia, relating to the particular goods or services purchased or acquired by the Commonwealth of Virginia under said contract.

H. MANDATORY USE OF STATE FORM AND TERMS AND CONDITIONS RFPs: Failure to submit a proposal on the official state form provided for that purpose may be a cause for rejection of the proposal. Modification of or additions to the General Terms and Conditions of the solicitation may be cause for rejection of the proposal; however, the Commonwealth reserves the right to decide, on a case by case basis, in its sole discretion, whether to reject such a proposal.

I. CLARIFICATION OF TERMS: If any prospective offeror has questions about the specifications or other solicitation documents, the prospective offeror should contact the buyer whose name appears on the face of the solicitation no later than five working days before the due date. Any revisions to the solicitation will be made only by addendum issued by the buyer.

J. PAYMENT:

1. To Prime Contractor:

a. Invoices for items ordered, delivered and accepted shall be submitted by the contractor directly to the payment address shown on the purchase order/contract. All invoices shall show the state contract number and/or purchase order number; social security number (for individual contractors) or the federal employer identification number (for proprietorships, partnerships, and corporations).

b. Any payment terms requiring payment in less than 30 days will be regarded as requiring payment 30 days after invoice or delivery, whichever occurs last. This shall not affect offers of discounts for payment in less than 30 days, however.

c. All goods or services provided under this contract or purchase order, that are to be paid for with public funds, shall be billed by the contractor at the contract price, regardless of which public agency is being billed.

d. The following shall be deemed to be the date of payment: the date of postmark in all cases where payment is made by mail, or the date of offset when offset proceedings have been instituted as authorized under the Virginia Debt Collection Act.

e. Unreasonable Charges. Under certain emergency procurements and for most time and material purchases, final job costs cannot be accurately determined at the time orders are placed. In such cases, contractors should be put on notice that final payment in full is contingent on a determination of reasonableness with respect to all invoiced charges. Charges which appear to be unreasonable will be researched and challenged, and that portion of the invoice held in abeyance until a settlement can be reached. Upon determining that invoiced charges are not reasonable, the Commonwealth shall promptly notify the contractor, in writing, as to those charges which it considers unreasonable and the basis for the determination. A contractor may not institute legal action

unless a settlement cannot be reached within thirty (30) days of notification. The provisions of this section do not relieve an agency of its prompt payment obligations with respect to those charges which are not in dispute (*Rules Governing Procurement, Chapter 2, Exhibit J, Attachment 1 § 53; available for review at http://www.jmu.edu/procurement*).

2. To Subcontractors:

   a. A contractor awarded a contract under this solicitation is hereby obligated:

      (1) To pay the subcontractor(s) within seven (7) days of the contractor's receipt of payment from the Commonwealth for the proportionate share of the payment received for work performed by the subcontractor(s) under the contract; or

      (2) To notify the agency and the subcontractors, in writing, of the contractor's intention to withhold payment and the reason.

   b. The contractor is obligated to pay the subcontractor(s) interest at the rate of one percent per month (unless otherwise provided under the terms of the contract) on all amounts owed by the contractor that remain unpaid seven (7) days following receipt of payment from the Commonwealth, except for amounts withheld as stated in (2) above. The date of mailing of any payment by U. S. Mail is deemed to be payment to the addressee. These provisions apply to each sub-tier contractor performing under the primary contract. A contractor's obligation to pay an interest charge to a subcontractor may not be construed to be an obligation of the Commonwealth.

3. Each prime contractor who wins an award in which provision of a SWAM procurement plan is a condition to the award, shall deliver to the contracting agency or institution, on or before request for final payment, evidence and certification of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the SWAM procurement plan. Final payment under the contract in question may be withheld until such certification is delivered and, if necessary, confirmed by the agency or institution, or other appropriate penalties may be assessed in lieu of withholding such payment.

4. The Commonwealth of Virginia encourages contractors and subcontractors to accept electronic and credit card payments.

K. PRECENDENCE OF TERMS: Paragraphs A through J of these General Terms and Conditions and the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors, shall apply in all instances. In the event there is a conflict between any of the other General Terms and Conditions and any Special Terms and Conditions in this solicitation, the Special Terms and Conditions shall apply.

L. QUALIFICATIONS OF OFFERORS: The Commonwealth may make such reasonable investigations as deemed proper and necessary to determine the ability of the offeror to perform the services/furnish the goods and the offeror shall furnish to the Commonwealth all such information and data for this purpose as may be requested. The Commonwealth reserves the right to inspect offeror's physical facilities prior to award to satisfy questions regarding the offeror's capabilities. The Commonwealth further reserves the right to reject any proposal if the evidence submitted by, or investigations of, such offeror fails to satisfy the Commonwealth that such offeror is properly qualified to carry out the obligations of the contract and to provide the services and/or furnish the goods contemplated therein.

M. TESTING AND INSPECTION: The Commonwealth reserves the right to conduct any test/inspection it may deem advisable to assure goods and services conform to the specifications.

N. ASSIGNMENT OF CONTRACT: A contract shall not be assignable by the contractor in whole or in part without the written consent of the Commonwealth.

O. CHANGES TO THE CONTRACT: Changes can be made to the contract in any of the following ways:

1. The parties may agree in writing to modify the scope of the contract. An increase or decrease in the price of the contract resulting from such modification shall be agreed to by the parties as a part of their written agreement to modify the scope of the contract.

2. The Purchasing Agency may order changes within the general scope of the contract at any time by written notice to the contractor. Changes within the scope of the contract include, but are not limited to, things such as services to be performed, the method of packing or shipment, and the place of delivery or installation. The contractor shall comply with the notice upon receipt. The contractor shall be compensated for any additional costs incurred as the result of such order and shall give the Purchasing Agency a credit for any savings. Said compensation shall be determined by one of the following methods:

   a. By mutual agreement between the parties in writing; or

   b. By agreeing upon a unit price or using a unit price set forth in the contract, if the work to be done can be expressed in units, and the contractor accounts for the number of units of work performed, subject to the Purchasing Agency's right to audit the contractor's records and/or to determine the correct number of units independently; or

   c. By ordering the contractor to proceed with the work and keep a record of all costs incurred and savings realized. A markup for overhead and profit may be allowed if provided by the contract. The same markup shall be used for determining a decrease in price as the result of savings realized. The contractor shall present the Purchasing Agency with all vouchers and records of expenses incurred and savings realized. The Purchasing Agency shall have the right to audit the records of the contractor as it deems necessary to determine costs or savings. Any claim for an adjustment in price under this provision must be asserted by written notice to the Purchasing Agency within thirty (30) days from the date of receipt of the written order from the Purchasing Agency. If the parties fail to agree on an amount of adjustment, the question of an increase or decrease in the contract price or time for performance shall be resolved in accordance with the procedures for resolving disputes provided by the Disputes Clause of this contract or, if there is none, in accordance with the disputes provisions of the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors. Neither the existence of a claim nor a dispute resolution process, litigation or any other provision of this contract shall excuse the contractor from promptly complying with the changes ordered by the Purchasing Agency or with the performance of the contract generally.

P. DEFAULT: In case of failure to deliver goods or services in accordance with the contract terms and conditions, the Commonwealth, after due oral or written notice, may procure them from other sources and hold the contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which the Commonwealth may have.

Q. INSURANCE: By signing and submitting a proposal under this solicitation, the offeror certifies that if awarded the contract, it will have the following insurance coverage at the time the contract is awarded. For construction contracts, if any subcontractors are involved, the subcontractor will have workers' compensation insurance in accordance with§ 25 of the Rules Governing Procurement – Chapter 2, Exhibit J, Attachment 1, and 65.2-800 et. Seq. of the Code of Virginia (available for review at http://www.jmu.edu/procurement) The offeror further certifies that the contractor and any subcontractors will maintain these insurance coverage during the entire term of the contract and that all insurance coverage will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

MINIMUM INSURANCE COVERAGES AND LIMITS REQUIRED FOR MOST CONTRACTS:

1. Workers' Compensation: Statutory requirements and benefits. Coverage is compulsory for employers of three or more employees, to include the employer. Contractors who fail to notify the Commonwealth of increases in the number of employees that change their workers' compensation requirement under the Code of Virginia during the course of the contract shall be in noncompliance with the contract.

2. Employer's Liability: $100,000

3. Commercial General Liability: $1,000,000 per occurrence and $2,000,000 in the aggregate. Commercial General Liability is to include bodily injury and property damage, personal injury and advertising injury, products and completed operations coverage. The Commonwealth of Virginia must be named as an additional insured and so endorsed on the policy.

4. Automobile Liability: $1,000,000 combined single limit. (*Required only if a motor vehicle not owned by the Commonwealth is to be used in the contract. Contractor must assure that the required coverage is maintained by the Contractor (or third party owner of such motor vehicle.*)

R. ANNOUNCEMENT OF AWARD: Upon the award or the announcement of the decision to award a contract over $100,000, as a result of this solicitation, the purchasing agency will publicly post such notice on the DGS/DPS eVA web site (www.eva.virginia.gov) for a minimum of 10 days.

S. DRUG-FREE WORKPLACE: During the performance of this contract, the contractor agrees to (i) provide a drug-free workplace for the contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the contractor that the contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order of over $10,000, so that the provisions will be binding upon each subcontractor or vendor.

For the purposes of this section, "drug-free workplace" means a site for the performance of work done in connection with a specific contract awarded to a contractor, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the contract.

T. NONDISCRIMINATION OF CONTRACTORS: An offeror, or contractor shall not be discriminated against in the solicitation or award of this contract because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, faith-based organizational status, any other basis prohibited by state law relating to discrimination in employment or because the offeror employs ex-offenders unless the state agency, department or institution has made a written determination that employing ex-offenders on the specific contract is not in its best interest. If the award of this contract is made to a faith-based organization and an individual, who applies for or receives goods, services, or disbursements provided pursuant to this contract objects to the religious character of the faith-based organization from which the individual receives or would receive the goods, services, or disbursements, the public body shall offer the individual, within a reasonable period of time after the date of his objection, access to equivalent goods, services, or disbursements from an alternative provider.

U. eVA BUSINESS TO GOVERNMENT VENDOR REGISTRATION, CONTRACTS, AND ORDERS: The eVA Internet electronic procurement solution, website portal www.eVA.virginia.gov, streamlines and automates government purchasing activities in the Commonwealth. The eVA portal is the gateway for vendors to conduct business with state agencies and public bodies. All vendors desiring to provide goods and/or services to the Commonwealth shall participate in the eVA Internet eprocurement solution by completing the free eVA Vendor Registration. All offerors must register in eVA and pay the Vendor Transaction Fees specified below; failure to register will result in the proposal being rejected. Vendor transaction fees are determined by the date the original purchase order is issued and the current fees are as follows:

Vendor transaction fees are determined by the date the original purchase order is issued and the current fees are as follows:

1. For orders issued July 1, 2014 and after, the Vendor Transaction Fee is:

   a. Department of Small Business and Supplier Diversity (SBSD) certified Small Businesses: 1% capped at $500 per order.

   b. Businesses that are not Department of Small Business and Supplier Diversity (SBSD) certified Small Businesses: 1% capped at $1,500 per order.

2. For orders issued prior to July 1, 2014 the vendor transaction fees can be found at www.eVA.virginia.gov.

3. The specified vendor transaction fee will be invoiced by the Commonwealth of Virginia Department of General Services approximately 60 days after the corresponding purchase order is issued and payable 30 days after the invoice date. Any adjustments (increases/decreases) will be handled through purchase order changes.

V. AVAILABILITY OF FUNDS: It is understood and agreed between the parties herein that the Commonwealth of Virginia shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.

W. PRICING CURRENCY: Unless stated otherwise in the solicitation, offerors shall state offered prices in U.S. dollars.

X. E-VERIFY REQUIREMENT OF ANY CONTRACTOR: Any employer with more than an average of 50 employees for the previous 12 months entering into a contract in excess of

$50,000 with James Madison University to perform work or provide services pursuant to such contract shall register and participate in the E-Verify program to verify information and work authorization of its newly hired employees performing work pursuant to any awarded contract.

Y. CIVILITY IN STATE WORKPLACES: The contractor shall take all reasonable steps to ensure that no individual, while performing work on behalf of the contractor or any subcontractor in connection with this agreement (each, a "Contract Worker"), shall engage in 1) harassment (including sexual harassment), bullying, cyber-bullying, or threatening or violent conduct, or 2) discriminatory behavior on the basis of race, sex, color, national origin, religious belief, sexual orientation, gender identity or expression, age, political affiliation, veteran status, or disability.

The contractor shall provide each Contract Worker with a copy of this Section and will require Contract Workers to participate in training on civility in the State workplace. Upon request, the contractor shall provide documentation that each Contract Worker has received such training.

For purposes of this Section, "State workplace" includes any location, permanent or temporary, where a Commonwealth employee performs any work-related duty or is representing his or her agency, as well as surrounding perimeters, parking lots, outside meeting locations, and means of travel to and from these locations. Communications are deemed to occur in a State workplace if the Contract Worker reasonably should know that the phone number, email, or other method of communication is associated with a State workplace or is associated with a person who is a State employee.

The Commonwealth of Virginia may require, at its sole discretion, the removal and replacement of any Contract Worker who the Commonwealth reasonably believes to have violated this Section.

This Section creates obligations solely on the part of the contractor. Employees or other third parties may benefit incidentally from this Section and from training materials or other communications distributed on this topic , but the Parties to this agreement intend this Section to be enforceable solely by the Commonwealth and not by employees or other third parties.

VIII. SPECIAL TERMS AND CONDITIONS

A. AUDIT: The Contractor hereby agrees to retain all books, records, systems, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. The Commonwealth of Virginia, its authorized agents, and/or State auditors shall have full access to and the right to examine any of said materials during said period.

B. CANCELLATION OF CONTRACT: James Madison University reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the contractor. In the event the initial contract period is for more than 12 months, the resulting contract may be terminated by either party, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.

C. IDENTIFICATION OF PROPOSAL ENVELOPE: The signed proposal should be returned in a separate envelope or package, sealed and identified as follows:

From: _____

Name of Offeror Due Date Time

Street or Box No. RFP #

City, State, Zip Code RFP Title

Name of Purchasing Officer:

The envelope should be addressed as directed on the title page of the solicitation.

The Offeror takes the risk that if the envelope is not marked as described above, it may be inadvertently opened and the information compromised, which may cause the proposal to be disqualified. Proposals may be hand-delivered to the designated location in the office issuing the solicitation. No other correspondence or other proposals should be placed in the envelope.

D. LATE PROPOSALS: To be considered for selection, proposals must be received by the issuing office by the designated date and hour. The official time used in the receipt of proposals is that time on the automatic time stamp machine in the issuing office. Proposals received in the issuing office after the date and hour designated are automatically non responsive and will not be considered. The University is not responsible for delays in the delivery of mail by the U.S. Postal Service, private couriers, or the intra university mail system. It is the sole responsibility of the Offeror to ensure that its proposal reaches the issuing office by the designated date and hour.

E. UNDERSTANDING OF REQUIREMENTS: It is the responsibility of each offeror to inquire about and clarify any requirements of this solicitation that is not understood. The University will not be bound by oral explanations as to the meaning of specifications or language contained in this solicitation. Therefore, all inquiries deemed to be substantive in nature must be in writing and submitted to the responsible buyer in the Procurement Services Office. Offerors must ensure that written inquiries reach the buyer at least five (5) days prior to the time set for receipt of offerors proposals. A copy of all queries and the respective response will be provided in the form of an addendum to all offerors who have indicated an interest in responding to this solicitation. Your signature on your Offer certifies that you fully understand all facets of this solicitation. These questions may be sent via email directly to the Procurement Officer listed on the signature page of this solicitation or by Fax to 540/568-7935.

F. RENEWAL OF CONTRACT: This contract may be renewed by the Commonwealth for a period of four (4) successive one year periods under the terms and conditions of the original contract except as stated in 1. and 2. below. Price increases may be negotiated only at the time of renewal. Written notice of the Commonwealth's intention to renew shall be given approximately 90 days prior to the expiration date of each contract period.

1. If the Commonwealth elects to exercise the option to renew the contract for an additional one-year period, the contract price(s) for the additional one year shall not exceed the contract price(s) of the original contract increased/decreased by no more than the percentage increase/decrease of the other services category of the CPI-W section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.

2. If during any subsequent renewal periods, the Commonwealth elects to exercise the option to renew the contract, the contract price(s) for the subsequent renewal period shall not exceed the contract price(s) of the previous renewal period increased/decreased by more

than the percentage increase/decrease of the other services category of the CPI-W section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.

G. SUBMISSION OF INVOICES: All invoices shall be submitted within sixty days of contract term expiration for the initial contract period as well as for each subsequent contract renewal period. Any invoices submitted after the sixty day period will not be processed for payment.

H. OPERATING VEHICLES ON JAMES MADISON UNIVERSITY CAMPUS: Operating vehicles on sidewalks, plazas, and areas heavily used by pedestrians is prohibited. In the unlikely event a driver should find it necessary to drive on James Madison University sidewalks, plazas, and areas heavily used by pedestrians, the driver must yield to pedestrians. For a complete list of parking regulations, please go to www.jmu.edu/parking; or to acquire a service representative parking permit, contact Parking Services at 540.568.3300. The safety of our students, faculty and staff is of paramount importance to us. Accordingly, violators may be charged.

I. COOPERATIVE PURCHASING / USE OF AGREEMENT BY THIRD PARTIES: It is the intent of this solicitation and resulting contract(s) to allow for cooperative procurement. Accordingly, any public body, (to include government/state agencies, political subdivisions, etc.), cooperative purchasing organizations, public or private health or educational institutions or any University related foundation and affiliated corporations may access any resulting contract if authorized by the Contractor.

Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor(s), the resultant contract(s) will be extended to the entities indicated above to purchase goods and services in accordance with contract terms. As a separate contractual relationship, the participating entity will place its own orders directly with the Contractor(s) and shall fully and independently administer its use of the contract(s) to include contractual disputes, invoicing and payments without direct administration from the University. No modification of this contract or execution of a separate agreement is required to participate; however, the participating entity and the Contractor may modify the terms and conditions of this contract to accommodate specific governing laws, regulations, policies, and business goals required by the participating entity. Any such modification will apply solely between the participating entity and the Contractor.

The Contractor will notify the University in writing of any such entities accessing this contract. The Contractor will provide semi-annual usage reports for all entities accessing the contract. The University shall not be held liable for any costs or damages incurred by any other participating entity as a result of any authorization by the Contractor to extend the contract. It is understood and agreed that the University is not responsible for the acts or omissions of any entity and will not be considered in default of the contract no matter the circumstances.

Use of this contract(s) does not preclude any participating entity from using other contracts or competitive processes as needed.

J. SMALL BUSINESS SUBCONTRACTING AND EVIDENCE OF COMPLIANCE:

1. It is the goal of the Commonwealth that 42% of its purchases are made from small businesses. This includes discretionary spending in prime contracts and subcontracts. All potential offerors are required to submit a Small Business Subcontracting Plan. Unless the offeror is registered as a Department of Small Business and Supplier Diversity (SBSD)-certified small business and where it is practicable for any portion of the awarded contract

to be subcontracted to other suppliers, the contractor is encouraged to offer such subcontracting opportunities to SBSD-certified small businesses. This shall not exclude SBSD-certified women-owned and minority-owned businesses when they have received SBSD small business certification. No offeror or subcontractor shall be considered a Small Business, a Women-Owned Business or a Minority-Owned Business unless certified as such by the Department of Small Business and Supplier Diversity (SBSD) by the due date for receipt of proposals. If small business subcontractors are used, the prime contractor agrees to report the use of small business subcontractors by providing the purchasing office at a minimum the following information: name of small business with the SBSD certification number or FEIN, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of product/service provided. **This information shall be submitted to: JMU Office of Procurement Services, Attn: SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807 or swamreporting@jmu.edu .**

2. Each prime contractor who wins an award in which provision of a small business subcontracting plan is a condition of the award, shall deliver to the contracting agency or institution with every request for payment, evidence of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the small business subcontracting plan. **This information shall be submitted to: JMU Office of Procurement Services, SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807 or swamreporting@jmu.edu** . When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the purchasing office at a minimum the following information: name of firm with the Department of Small Business and Supplier Diversity (SBSD) certification number or FEIN number, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of product or service provided. Payment(s) may be withheld until compliance with the plan is received and confirmed by the agency or institution. The agency or institution reserves the right to pursue other appropriate remedies to include, but not be limited to, termination for default.

3. Each prime contractor who wins an award valued over $200,000 shall deliver to the contracting agency or institution with every request for payment, information on use of subcontractors that are not Department of Small Business and Supplier Diversity (SBSD)-certified small businesses. When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the purchasing office at a minimum the following information: name of firm, phone number, FEIN number, total dollar amount subcontracted, and type of product or service provided. **This information shall be submitted to: JMU Office of Procurement Services, Attn: SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807 or swamreporting@jmu.edu** .

K. AUTHORIZATION TO CONDUCT BUSINESS IN THE COMMONWEALTH: A contractor organized as a stock or nonstock corporation, limited liability company, business trust, or limited partnership or registered as a registered limited liability partnership shall be authorized to transact business in the Commonwealth as a domestic or foreign business entity if so required by Title 13.1 or Title 50 of the Code of Virginia or as otherwise required by law. Any business entity described above that enters into a contract with a public body shall not allow its existence to lapse or its certificate of authority or registration to transact business in the Commonwealth, if so required under Title 13.1 or Title 50, to be revoked or cancelled at any time during the term of the contract. A public body may void any contract with a business entity if the business entity fails to remain in compliance with the provisions of this section.

L. PUBLIC POSTING OF COOPERATIVE CONTRACTS: James Madison University maintains a web-based contracts database with a public gateway access. Any resulting cooperative contract/s to this solicitation will be posted to the publicly accessible website. Contents identified as proprietary information will not be made public.

M. CRIMINAL BACKGROUND CHECKS OF PERSONNEL ASSIGNED BY CONTRACTOR TO PERFORM WORK ON JMU PROPERTY: The Contractor shall obtain criminal background checks on all of their contracted employees who will be assigned to perform services on James Madison University property. The results of the background checks will be directed solely to the Contractor. The Contractor bears responsibility for confirming to the University contract administrator that the background checks have been completed prior to work being performed by their employees or subcontractors. The Contractor shall only assign to work on the University campus those individuals whom it deems qualified and permissible based on the results of completed background checks. Notwithstanding any other provision herein, and to ensure the safety of students, faculty, staff and facilities, James Madison University reserves the right to approve or disapprove any contract employee that will work on JMU property. Disapproval by the University will solely apply to JMU property and should have no bearing on the Contractor's employment of an individual outside of James Madison University.

N. INDEMNIFICATION: Contractor agrees to indemnify, defend and hold harmless the Commonwealth of Virginia, its officers, agents, and employees from any claims, damages and actions of any kind or nature, whether at law or in equity, arising from or caused by the use of any materials, goods, or equipment of any kind or nature furnished by the contractor/any services of any kind or nature furnished by the contractor, provided that such liability is not attributable to the sole negligence of the using agency or to failure of the using agency to use the materials, goods, or equipment in the manner already and permanently described by the contractor on the materials, goods or equipment delivered.

O. ADDITIONAL GOODS AND SERVICES: The University may acquire other goods or services that the supplier provides than those specifically solicited. The University reserves the right, subject to mutual agreement, for the Contractor to provide additional goods and/or services under the same pricing, terms, and conditions and to make modifications or enhancements to the existing goods and services. Such additional goods and services may include other products, components, accessories, subsystems, or related services that are newly introduced during the term of this Agreement. Such additional goods and services will be provided to the University at favored nations pricing, terms, and conditions.

P. PRIME CONTRACTOR RESPONSIBILITIES: The contractor shall be responsible for completely supervising and directing the work under this contract and all subcontractors that he may utilize, using his best skill and attention. Subcontractors who perform work under this contract shall be responsible to the prime contractor. The contractor agrees that he is as fully responsible for the acts and omissions of his subcontractors and of persons employed by them as he is for the acts and omissions of his own employees.

Q. SUBCONTRACTS: No portion of the work shall be subcontracted without prior written consent of the purchasing agency. In the event that the contractor desires to subcontract some part of the work specified herein, the contractor shall furnish the purchasing agency the names, qualifications and experience of their proposed subcontractors. The contractor shall, however, remain fully liable and responsible for the work to be done by its subcontractor(s) and shall assure compliance with all requirements of the contract.

R. CONFIDENTIALITY OF PERSONALLY IDENTIFIABLE INFORMATION: The contractor assures that information and data obtained as to personal facts and circumstances related to faculty, staff, students, and affiliates will be collected and held confidential, during and following the term of this agreement, and will not be divulged without the individual's and the agency's written consent and only in accordance with federal law or the Code of Virginia. This shall include FTI, which is a term of art and consists of federal tax returns and return information *(and information derived from it)* that is in contractor/agency possession or control which is covered by the confidentiality protections of the Internal Revenue Code *(IRC)* and subject to the IRC 6103(p)(4) safeguarding requirements including IRS oversight. FTI is categorized as sensitive but unclassified information and may contain personally identifiable information *(PII)*. Contractors who utilize, access, or store personally identifiable information as part of the performance of a contract are required to safeguard this information and immediately notify the agency of any breach or suspected breach in the security of such information. Contractors shall allow the agency to both participate in the investigation of incidents and exercise control over decisions regarding external reporting. Contractors and their employees working on this project may be required to sign a confidentiality statement.

IX. METHOD OF PAYMENT

The contractor will be paid based on invoices submitted in accordance with the solicitation and any negotiations. James Madison University recognizes the importance of expediting the payment process for our vendors and suppliers; we request that our vendors and suppliers enroll in our bank's Comprehensive Payable options: either the Virtual Payables Virtual Card or the PayMode-X electronic deposit (ACH) to your bank account so that future payments are made electronically. Contractors signed up for the Virtual Payables process will receive the benefit of being paid Net 15. Additional information is available online at: http://www.jmu.edu/financeoffice/accounting-operations-disbursements/cash-investments/vendor-payment-methods.shtml

X. PRICING SCHEDULE

The offeror shall provide pricing for all products and services included in proposal indicating one-time and on-going costs. The resulting contract will be cooperative and pricing shall be inclusive for the attached Zone Map, of which JMU falls within Zone 2.

1. Contractor shall provide a list of all labor category(ies) and the associated hourly rate(s).
2. Provide all other costs including incidentals, travel, and miscellaneous fees that would apply.

Specify any associated charge card processing fees, if applicable, to be billed to the university.

XI. ATTACHMENTS

Attachment A: Offeror Data Sheet

Attachment B: Small, Women, and Minority-owned Business (SWaM) Utilization Plan

Attachment C: Standard Contract Sample

Attachment D: Zone Map

ATTACHMENT A

OFFEROR DATA SHEET

TO BE COMPLETED BY OFFEROR

1. QUALIFICATIONS OF OFFEROR: Offerors must have the capability and capacity in all respects to fully satisfy the contractual requirements.

2. YEARS IN BUSINESS: Indicate the length of time you have been in business providing these types of goods and services.

   Years_____ Months_____

3. REFERENCES: Indicate below a listing of at least five (5) organizations, either commercial or governmental/educational, that your agency is servicing. Include the name and address of the person the purchasing agency has your permission to contact.

CLIENT	LENGTH OF SERVICE	ADDRESS	CONTACT PERSON/PHONE #

4. List full names and addresses of Offeror and any branch offices which may be responsible for administering the contract.

_____

_____

_____

_____

5. RELATIONSHIP WITH THE COMMONWEALTH OF VIRGINIA: Is any member of the firm an employee of the Commonwealth of Virginia who has a personal interest in this contract pursuant to the CODE OF VIRGINIA, SECTION 2.2-3100 – 3131?
   [ ] YES [ ] NO
   IF YES, EXPLAIN:_____

_____

_____

_____

ATTACHMENT B

Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

Offeror Name: _____ Preparer Name: _____

Date: _____

Is your firm a **Small Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes_____ No_____

If yes, certification number: _____ Certification date:_____

Is your firm a **Woman-owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes_____ No_____

If yes, certification number: _____ Certification date:_____

Is your firm a **Minority-Owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes____ No_____

If yes, certification number: _____ Certification date:_____

Is your firm a **Micro Business** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes_____ No_____

If yes, certification number: _____ Certification date: _____

Instructions: *Populate the table below to show your firm's plans for utilization of small, women-owned and minority-owned business enterprises in the performance of the contract. Describe plans to utilize SWAMs businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.*

Small Business: "Small business " means a business, independently owned or operated by one or more persons who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of $10 million or less averaged over the previous three years.

Woman-Owned Business Enterprise: A business concern which is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more women, and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified women-owned businesses are also a small business enterprise.**

Minority-Owned Business Enterprise: A business concern which is at least 51 percent owned by one or more minorities or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more minorities and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified minority-owned businesses are also a small business enterprise.**

Micro Business is a certified Small Business under the SWaM Program and has no more than twenty-five (25) employees **AND** no more than $3 million in average annual revenue over the three-year period prior to their certification.

All small, women, and minority owned businesses must be certified by the Commonwealth of Virginia Department of Small Business and Supplier Diversity (SBSD) to be counted in the SWAM program. Certification applications are available through SBSD at 800-223-0671 in Virginia, 804-786-6585 outside Virginia, or online at http://www.sbsd.virginia.gov/ (Customer Service).

RETURN OF THIS PAGE IS REQUIRED

ATTACHMENT B (CNT'D)

Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

Procurement Name and Number: _____ Date Form Completed:_____

Listing of Sub-Contractors, to include, Small, Woman Owned and Minority Owned Businesses
for this Proposal and Subsequent Contract

Offeror / Proposer:

_____	_____	_____
Firm	Address	Contact Person/No.

Sub-Contractor's Name and Address	Contact Person & Phone Number	SBSD Certification Number	Services or Materials Provided	Total Subcontractor Contract Amount (to include change orders)	Total Dollars Paid Subcontractor to date (to be submitted with request for payment from JMU)

(Form shall be submitted with proposal and if awarded, a SWaM Sub-contractor Reporting Form shall be submitted to swamreporting@jmu.edu)

RETURN OF THIS PAGE IS REQUIRED

ATTACHMENT C

COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT

Contract No._____

This contract entered into this_____day of_____20____,by _____ hereinafter called the "Contractor" and Commonwealth of Virginia, James Madison University called the "Purchasing Agency".

WITNESSETH that the Contractor and the Purchasing Agency, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF CONTRACT: The Contractor shall provide the services to the Purchasing Agency as set forth in the Contract Documents.

PERIOD OF PERFORMANCE: From_____ through_____

The contract documents shall consist of:

(1) This signed form;

(2) The following portions of the Request for Proposals dated _____:
- (a) The Statement of Needs,
- (b) The General Terms and Conditions,
- (c) The Special Terms and Conditions together with any negotiated modifications of those Special Conditions;
- (d) List each addendum that may be issued

(3) The Contractor's Proposal dated _____and the following negotiated modification to the Proposal, all of which documents are incorporated herein.
- (a) Negotiations summary dated _____.

SAMPLE

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

CONTRACTOR:	PURCHASING AGENCY:
By:_____	By:_____
(Signature)	(Signature)
_____	_____
(Printed Name)	(Printed Name)
Title:_____	Title:_____

ATTACHMENT D

Zone Map

Virginia Association of State College & University Purchasing Professionals (VASCUPP)

List of member institutions by zones

Zone 1	**Zone 2**	**Zone 3**
George Mason University (Fairfax)	James Madison University (Harrisonburg)	University of Virginia (Charlottesville)
Zone 4	**Zone 5**	**Zone 6**
University of Mary Washington (Fredericksburg)	Christopher Newport University (Newport News)	Virginia Commonwealth University (Richmond)
	College of William and Mary (Williamsburg)	Virginia State University (Petersburg)
	Norfolk State University (Norfolk)	
	Old Dominion University (Norfolk)	
Zone 7	**Zone 8**	**Zone 9**
Longwood University (Farmville)	Virginia Military Institute (Lexington)	University of Virginia - Wise (Wise)
	Virginia Tech (Blacksburg)	
	Radford University (Radford)	

JAMES MADISON UNIVERSITY.

February 23, 2026

ADDENDUM NO.: ONE

TO ALL OFFERORS:

REFERENCE:	Request for Proposal No:	**RFP# SLD-1247**
	Dated:	**February 12, 2026**
	Commodity:	**Grant Proposal Development and Consulting Services**
	RFP Closing On:	**March 11, 2026 at 2:00 p.m.** ***(Eastern)***

Please note the clarifications and/or changes made on this proposal program:

1. *Question:* How many grant opportunities/proposals per year are anticipated, and what are the typical turnaround times?

   Answer: This is unknown.

2. *Question:* How frequently is on-site data collection anticipated, and what travel/local presence assumptions should pricing reflect?

   Answer: On-site expectations are unknown, but offerors should provide all available pricing information.

3. *Question:* What are the minimum expected outcomes (e.g. number of logic models, instruments, evaluation plans, reports) for a "typical" engagement?

   Answer: This is unknown and will vary based on project scope.

4. *Question:* Will JMU require use of specific systems for artifact storage/collaboration, and what constraints exist for any contractor-hosted solutions?

   Answer: There are no requirements for specific systems currently. Existing constraints depend on the type of JMU data being shared or stored and will follow JMU IT policies if required. At this time, there is no expectation of sensitive data to be shared that would have any constraints.

5. *Question:* Which entities beyond JMU (if any) are expected to use the cooperative arrangement, and how should that affect pricing assumptions by zone?

   Answer: We cannot confirm which entities beyond JMU would be interested in utilizing any resulting contract.

MSC 5720
752 Ott Street, Room 1042
Wine Price Building
Harrisonburg, VA 22807
Office of
PROCUREMENT SERVICES
540.568.3145 Phone
540.568.7935 Fax

Signify receipt of this addendum by initialing *"Addendum # 1"* on the signature page of your proposal.

Sincerely,

Shanna Devers, CUPO
Lead Commodity Contract Officer
Email: deverssl@jmu.edu
Phone: (540-568-3131)

JAMES MADISON UNIVERSITY.

March 2, 2026

ADDENDUM NO.: TWO

TO ALL OFFERORS:

REFERENCE:	Request for Proposal No:	**RFP# SLD-1247**
	Dated:	**February 12, 2026**
	Commodity:	**Grant Proposal Development and Consulting Services**
	RFP Closing On:	**March 11, 2026 at 2:00 p.m.** ***(Eastern)***

Please note the clarifications and/or changes made on this proposal program:

1. *Question:* Are you seeking training on the grant development process, or are you seeking a firm to write proposals and grants for the university, or both?

   Answer: JMU CARE is not seeking training. We need a firm that brings specialized expertise to collaborate with our team in writing grants, developing competitive proposals, and strengthening our overall capacity to pursue external funding.

2. *Question:* Please provide more specificity around the nature of "capacity building" that is referred to under the statement of needs. For example, are you seeking a firm to provide training that builds faculty/staff capacity across all tasks/items listed or does capacity refer to engaging a partner that can supplement the strengths of the university to expand its "bench" of researchers?

   Answer: In this context, "capacity building" refers to augmenting JMU CARE's internal expertise and bandwidth by engaging a partner with deep experience in grant writing, evaluation design, grant strategy, and related technical skills. This is not about faculty/staff training. It is about supplementing our team with expert partners who can help expand our ability to pursue and manage complex grant opportunities.

3. *Question:* The scope requests "data collection," so we want to confirm expectations around this (frequency, location(s), modality). Or, is the expectation that the vendor support JMU CARE to think about methodology and data collection methods and approaches?

   Answer: Expectations will vary by project, and in many cases the firm's role will be to support JMU CARE in designing appropriate methodologies and data collection approaches. Some projects may include data collection, but this will depend entirely on the individual project scope.

4. *Question:* Reference Statement of Needs, B. #16: Who is meant by "project staff" - is this our proposed team supporting JMU or is it JMU staff?

   Answer: "Project staff" refers to the vendor's proposed team supporting JMU/CARE, not JMU personnel.

MSC 5720
752 Ott Street, Room 1042
Wine Price Building
Harrisonburg, VA 22807
Office of 540.568.3145 Phone
PROCUREMENT SERVICES 540.568.7935 Fax

5. *Question:* What are the specific expectations related to "ongoing training"?

   Answer: JMU CARE does not require the vendor to provide training to JMU CARE staff. However, we do expect the vendor to maintain ongoing internal training for their own personnel to ensure consistently high-quality services. The expectation is that the vendor's team will continuously develop and update their expertise, so that CARE receives support informed by current standards, high technical quality, and up-to-date knowledge of the funding landscape.

Signify receipt of this addendum by initialing *"Addendum # 2"* on the signature page of your proposal.

Sincerely,

Shanna Devers, CUPO
Lead Commodity Contract Officer
Email: deverssl@jmu.edu
Phone: (540-568-3131)

JAMES MADISON UNIVERSITY.

March 5, 2026

ADDENDUM NO.: THREE

TO ALL OFFERORS:

REFERENCE:

Request for Proposal No:	**RFP# SLD-1247**
Dated:	**February 12, 2026**
Commodity:	**Grant Proposal Development and Consulting Services**
RFP Closing On:	**March 11, 2026 at 2:00 p.m.** ***(Eastern)***

Please note the clarifications and/or changes made on this proposal program:

1. *Question:* How does JMU define "strategic thought partnership" in this context, and what types of decisions or planning processes should Elite Research support?

   Answer: For JMU, this means helping clarify complex ideas, co-creating solutions, and offering new perspectives.

2. *Question:* For evaluation services, does JMU expect formative, developmental, outcomes-focused, or mixed-methods evaluation, and should the partner design frameworks, conduct evaluations, or both?

   Answer: JMU CARE anticipates that evaluation needs will vary by project, and the firm should be prepared to support formative, developmental, outcomes-focused, and mixed-methods approaches depending on the scope. The vendor should be able to design evaluation frameworks and, when appropriate for the project, conduct components of the evaluation, though the extent will differ case by case.

3. *Question:* Does JMU have existing interdisciplinary initiatives (e.g., health, education, STEM, social impact) that the partner should integrate with? and/or Which colleges, centers, or research clusters are expected to be the primary users of these services?

   Answer: This is unknown, as projects will vary depending on scope.

4. *Question:* Is JMU open to or capable of providing incentives (gift cards, raffles, etc.) to encourage participation?

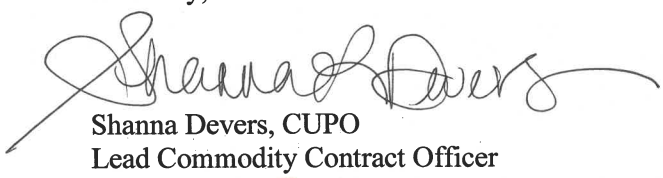
   Answer: This is unknown at this time.

Signify receipt of this addendum by initialing *"Addendum # 3"* on the signature page of your proposal.

Office of
PROCUREMENT SERVICES

MSC 5720
752 Ott Street, Room 1042
Wine Price Building
Harrisonburg, VA 22807
540.568.3145 Phone
540.568.7935 Fax

Sincerely,



Shanna Devers, CUPO
Lead Commodity Contract Officer
Email: deverssl@jmu.edu
Phone: (540-568-3131)