



**Educational
Policy
Institute**

Corporate Capability Statement

February 2014

**PROGRAM EVALUATION • RESEARCH & SURVEY DESIGN • LOGISTICS
DATA ANALYSIS • TECHNICAL ASSISTANCE
ONLINE DATA MANAGEMENT & WAREHOUSING • STRATEGIC PLANNING**

www.educationalpolicy.org



Educational Policy Institute is a Certified Small Business (SBA) and qualified US Department of Education ED-SAT contractor founded by Dr. Watson Scott Swail to fulfill a need for more rigorous educational research and to create better linkages between research and public policy. EPI provides research design and management, program evaluation, policy analysis, and technical assistance to school districts, institutions of higher education, governmental organizations, and other stakeholders in the educational and public policy arena.

Much of EPI's research focuses on access to quality educational opportunities and on access to and success through postsecondary education. Many of EPI's projects are related to federally-funded initiatives involving the preparation and training of teachers, school reform efforts, student college readiness, and postsecondary retention, return on investment in education, and workforce outcomes.

EPI's clients have included the US Department of Education, Lumina Foundation for Education, the Bill & Melinda Gates Foundation, the National Council on Disability, the American Association for the Advancement of Science (AAAS), and many others. In addition, EPI has completed projects for school districts around the United States as well as agencies in many US states and Canadian provinces.

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Summary List of Clients

Below is a select list of EPI's past and present clients and funders.

GOVERNMENT AGENCIES

- US Department of Education
- Colorado Commission on Higher Education (CCHE)
- Florida Council on Education Policy, Research, and Improvement (CEPRI)
- Library of Congress
- Ohio Board of Regents
- Kentucky Council on Postsecondary Education
- Iowa Department of Education
- North Carolina Department of Public Instruction (NCDPI)
- Texas Education Agency

NGOs

- Canada Millennium Scholarship Foundation (CMSF)
- Imagine America Foundation
- KIPP Foundation
- Midwestern Higher Education Compact
- National Action Council for Minority Engineers (NACME)
- National Council on Disabilities (NCD)
- Pew Hispanic Center
- Ohio College Access Network (OCAN)
- Pacific Resources for Education and Learning (PREL)
- Western Interstate Commission on Higher Education (WICHE)

HIGHER EDUCATION

- DeVry, Inc.
- Kaplan Higher Education
- Ohio Dominican University
- Old Dominion University
- Palm Beach Community College
- College of William & Mary
- University of Wisconsin System

SCHOOL SYSTEMS

- Hampton City Schools
- Pittsburgh Public Schools
- Lawrence County School District
- Newport News Public Schools
- SEED School of Maryland
- School Board of Osceola County, Florida
- St. Vrain Public Schools

PHILANTHROPIC ORGANIZATIONS

- The Ford Foundation
- Bill & Melinda Gates Foundation
- Alfred P. Sloan Foundation
- Lumina Foundation for Education
- Raymond John Wean Foundation

CORPORATE/OTHER

- The Evaluation Partnership Limited/The European Union
- SERVE/Southeastern Regional Educational Laboratory
- Westat
- WestEd

Core Capabilities

Educational Policy Institute provides expertise in K-12 and postsecondary education in the following core areas:

PROGRAM EVALUATION. Educational Policy Institute conducts evaluations of educational programs and interventions. This evaluation work includes evaluation design, implementation, and analysis, and includes the development and use of surveys, interviews, focus groups, and data analysis. Educational Policy Institute's work in this field includes both formative and summative evaluations, including impact evaluations to determine the utility of programs and strategies on student learning and progress as well as return on investment analyses to assess the best use of project funding. We help organizations understand what works and what doesn't.

RESEARCH DESIGN AND MANAGEMENT. Educational Policy Institute designs and directs small, medium, and large-scale research projects to answer questions that help us better understand the education system, how students learn, and how we can improve systems and strategies to improve the education process. EPI's work in this area includes the design and implementation of experimental, quasi-experimental, and non-experimental studies, formative and summative research, survey development, site-based research, including focus groups, interviews, and document retrieval/review, and data collection and analysis. Our research team has extensive experience in data analysis using all major statistical programs, including SPSS, SAS, HLM, Excel, and Access. EPI's staff and consultants include some of the best researchers from around the world.

POLICY ANALYSIS. Educational Policy Institute conducts policy and trend analyses on a variety of educational issues related to educational preparation, matriculation to postsecondary studies, and postsecondary success. EPI policy briefs address issues such as federal and state/provincial policies and institutional/school policies and practices. In addition to these efforts, we also conduct reviews of related research, legislation, and literature.

DATA SERVICES. Educational Policy Institute provides data services for organizations in the form of data collection, warehousing, and dissemination. EPI has developed numerous surveys and administered these instruments to a large number of students, and also has the internal capacity to build data tools and warehouses to store and retrieve data in a timely fashion. EPI has developed its own longitudinal data management system—the EPI Data Analysis System, or EPI-DAS—for use with large-scale evaluation projects. EPI-DAS enables individual student unit record data to be loaded directly into the system that facilitates data collection, descriptive analysis, and reporting. Data can be exported from EPI-DAS in the form of .CSV spreadsheets for uploading into statistical software programs such as SPSS.

PROFESSIONAL DEVELOPMENT. Educational Policy Institute conducts conferences, workshops, and webinars and writes books, articles, and guidebooks for the development of education professionals. Educational Policy Institute's staff can help coordinate all aspects of conference work, from conceptualization to registration and logistics. Over the past decade, EPI has conducted over 50 professional development events, not including dozens of web-based telecasts and hundreds of publications and newsletters.

CONSULTING. Through our research expertise, we provide a solid foundation of empirical support for our partners and clients. Some of the areas include professional development, benchmarking, change management, leadership development, team building, and policy development. EPI assists institutions in the planning and implementation of new programs to improve student retention, complete with diagnostics and analysis of current conditions and practices.

Selected Project Experience

Elementary & Secondary Education

1. Academic Excellence through STEM Innovation, A Race to the Top (RTTT) Grant, St. Vrain Valley Schools, CO (2013-2017)
2. Magnet Schools Assistance Program (MSAP) Compliance Monitoring, US Department of Education, Washington, DC (2011-2014)
3. Evaluation of the Pittsburgh Science and Technology Academy, Pittsburgh Public Schools, Pittsburgh, PA (2009-11)
4. Evaluation for Safe Schools/Healthy Students Grant, Lawrence County School District, Monticello, MS (2009-2013)
5. Evaluation of the St. Vrain Investment in Innovation (i3) Grant, St. Vrain Valley Schools, CO (2010-2015)
6. Texas High School Project Evaluation: Expansion of Scope, Texas Education Agency (TEA), Austin, TX (2009)
7. Study of District Practices in the Evaluation of Professional Development Initiatives in the State of Alabama, Southeastern Regional Educational Laboratory/Alabama State Department of Education, Montgomery, AL (2009)
8. Statewide Evaluation of the Iowa Reading First Program, Iowa Department of Education, Iowa City, IA (2007-08)
9. Development of Evaluation Framework for the Teaching with Primary Sources Program, The Library of Congress (2008-10)
10. Evaluation of the Teacher Immersion Residency Teacher Quality Partnership Grant, Old Dominion University, Norfolk, Virginia (2009-2013)
11. Newport News Public Schools Teaching American History (TAH) Evaluation, Newport News Public Schools (2009-2014)
12. Miami University of Ohio Teaching American History (TAH) Evaluation, Miami, OH (2010-2015)
13. Richmond County Public Schools Teaching American History (TAH) Evaluation, Richmond, VA (2010)
14. Improving Teacher Quality State Grants, School-University Research Network, College of William and Mary, Williamsburg, VA (2008-2011)
15. Impact Analysis of the Knowledge is Power Program, KIPP Foundation (2005)
16. Evaluation of the Pilot Communities for Infant and Toddler Social, Emotional, and Behavioral Development Grant, Virginia Department of Social Services, Richmond, VA (2010-11)
17. Evaluation of Elementary and Secondary School Counseling Program, School Board of Osceola County, Kissimmee, FL (2009-11)
18. Evaluation of the Hampton GEAR UP Program, Hampton City Schools, Hampton, VA (2008-14)
19. Formative Evaluation of the Prudential Foundation New Jersey Youth Initiative, Prudential Foundation of New Jersey, Newark, NJ (2003-04)

1. Academic Excellence through STEM Innovation, A Race to the Top (RTTT) Grant, St. Vrain Valley Schools, CO (2013-2017)

Educational Policy Institute has been contracted by St. Vrain Valley Schools to evaluate their \$16 million federal Race to the Top (RTTT) program. The project involves several components with the goal of increasing graduation rates by 5 percent annually for all subgroups; promoting and expanding rigorous STEM programming at all levels with STEM; and increasing family engagement annually by providing opportunities for involvement in student learning. A major component of the project includes the creation of the Innovation Center at Skyline High School. St. Vrain will expand the school year, mentor high-risk students, and broaden science, technology, engineering and math (STEM) curriculum and also offer something called Ptech, which is described a STEM track for students who are not on a four-year college track. In addition, St. Vrain will offer a seven-week summer program of intense math and literacy instruction to at-risk students.

2. Magnet Schools Assistance Program (MSAP) Compliance Monitoring, US Department of Education, Washington, DC (2011-2014)

EPI was awarded a subcontract by WestEd for the three-year project that will help ensure that grantees are implementing their MSAP programs as designed and approved. Individual program reviews, including monitoring visits, will be used to observe the implementation of the grantee's approved MSAP program and to determine compliance with federal statute and coherence with the grantee's approved MSAP grant application. The overall goal of the MSAP Compliance Monitoring Project is to determine how and to what extent MSAP grantees are using their federal funds to develop and implement high-quality magnet schools that decrease racial group isolation, and increase student academic achievement as specified in Title V, Part C MSAP statutes, regulations, and policies. WestEd is providing monitoring services for ED that will orient and engage MSAP grantees to incorporate compliance monitoring activities as part of a growth and capacity-building model. EPI will contribute subject matter expert consultants to 4 monitoring teams who will participate in on-site visits and data collection, summarize findings, and submit written reports. As a subcontractor, EPI's contact for the project is Ms. Sara Allender, Senior Research Associate, WestEd, 1350 Connecticut Avenue NW, Suite 1050, Washington, DC 20036-1709 (202.429.9724; sallend@wested.org).

3. Evaluation of the Pittsburgh Science and Technology Academy, Pittsburgh Public Schools, Pittsburgh, PA (2009-11)

EPI was contracted by the Pittsburgh Public Schools to plan and execute an evaluation of the implementation process and early impacts of the Pittsburgh Science & Technology Academy (www.pghscitech.net), a school for 6th to 12th graders, targeting the development of skills that will enable students to pursue a career in science, technology, engineering, or mathematics. The creation of this school followed three years of research and planning. EPI provides program evaluation services focused on 1) the program in practice relative to its goals, design, and program theory, 2) the impact of design and process on the overall and the daily experience of students and staff, 3) preliminary impact on student motivation and achievement, and 4) preliminary impact on the ability of the program to attract and retain students in the Pittsburgh Public Schools. To measure these outcomes, EPI collects archival student data from the school and developed student, teacher, and parent surveys. *Contact:* Mr. Sam Franklin, Executive Director of the Office of Teacher Effectiveness, Pittsburgh Public Schools, 341 S. Bellefield Avenue, Room 312, Pittsburgh, PA 15213 (412-622-3786; Sfranklin1@pghboe.net).

4. Evaluation for Safe Schools/Healthy Students Grant, Lawrence County School District, Monticello, MS (2009-2013)

EPI serves as the external evaluator in Lawrence and Jones Counties for this federally-funded initiative, which seeks to unite early childhood services, schools, mental health, juvenile justice, and law enforcement to promote safe community and school environments and healthy child development, by preventing violence and drug use. EPI developed the program logic model, evaluation plan, and survey instruments; oversees the collection of field data; and analyzes and reports data in response to Government Performance and Results Act (GPRA) measures and project-level objectives. As part of this evaluation, EPI conducts monthly technical assistance visits with project staff and an annual three-day site visit to evaluate implementation. Outcomes include decreases in disciplinary actions (i.e., school-based and within the courts), physical fighting/violence, absences

due to fears for safety, alcohol and drug use, and teen pregnancy and increased access to mental health services. *Contact:* Ms. Elizabeth Woods, Project Director, Lawrence County School District, 346 Thomas E Jolly Drive, Monticello, MS 39654 (601-587-2506; ewoods@lawrence.k12.ms.us).

5. Evaluation of the St. Vrain Investment in Innovation (i3) Grant, St. Vrain Valley Schools, CO (2010-2015)

EPI was contracted by the St. Vrain Valley School District to plan and execute an implementation and outcome evaluation of their i3 grant. This project targets one feeder in the district (i.e., one high school, two middle schools, and four elementary schools) which are Title I schools with a high proportion of Hispanic and English Language Learner (ELL) students and struggle with low achievement. At the elementary level, the project targets reading; at the middle schools, math; and at the high schools, a STEM path and certificate. At the center of the initiative is a student-focused, data-based decision making process to screen students, target instruction, and make adaptations where needed. EPI has worked to develop an evaluation plan, is developing measures, and will analyze the extent of implementation of each component as well as student outcomes (e.g., achievement at all levels, graduation, enrollment in college) in targeted and matched, comparison schools as well as sustainability and dissemination of the project. *Contact:* Regina Renaldi, Director of Title I Schools and Project Director, St. Vrain Valley School District, 395 South Pratt Parkway, Longmont, CO 80501 (303-682-7211; Renaldi_Regina@stvrain.k12.co.us).

6. Texas High School Project Evaluation: Expansion of Scope, Texas Education Agency (TEA), Austin, TX (2009)

EPI was contracted to assist TEA with the development of a plan to expand the scope of the Texas High School Project (THSP) Evaluation to include additional grantees as well as funds provided by the Michael & Susan Dell Foundation (MSDF). As part of the project, EPI conducted a review and analysis of the original evaluation request for proposal, the incumbent evaluator's redacted response, and MSDF funding priorities. EPI also interviewed various stakeholders at several funding organizations to assess interests and priorities. The final product was the creation of a report detailing five evaluation options and designs for TEA to incorporate into the existing THSP evaluation contract. *Contact:* Ms. Megan Parry, Manager of the Texas High School Project Evaluation, Texas Education Agency, 1701 N. Congress Avenue Austin, TX 78701 (Megan.parry@tea.state.tx.us).

7. Study of District Practices in the Evaluation of Professional Development Initiatives in the State of Alabama, Southeastern Regional Educational Laboratory/Alabama State Department of Education, Montgomery, AL (2009)

EPI conducted a study of eight mid-sized Alabama school districts to identify the type of evidence on impact used in selecting and evaluating professional development initiatives. As part of our work, EPI staff prepared an annotated bibliography of descriptive studies on processes of district-level evaluation of professional development and conducted interviews with instructional leaders, district superintendents, and the state deputy superintendent responsible for professional development to determine how districts identify areas of need for professional development, how professional development activities are chosen, and how activity implementation and outcomes are monitored. A report presenting these findings of this study was published in October 2009 and can be found at

http://www.educationalpolicy.org/publications/pubpdf/EBE_436_Eval%20PD_AL.pdf. *Contact:* Dr. Wendy McColskey, Program Director, SERVE (336-315-7432; wmccolsk@serve.org).

8. Statewide Evaluation of the Iowa Reading First Program, Iowa Department of Education, Iowa City, IA (2007-08)

EPI conducted an evaluation of Iowa's statewide Reading First Program, a federally-sponsored program which targets students in K-3. In addition to developing case studies of ten of the state's best-performing schools, this evaluation included univariate and multivariate statistical analyses of school-level student achievement data. Specific statistical methods included Hierarchical Linear Regression (HLR), Multivariate Analysis of Variance (MANOVA), and chi-square analysis. *Contact:* Ms. Carlene Lodermeier, Division of PK-12 Education, Iowa Department of Education, Grimes State Office Building, 400 E 14th St., Des Moines, IA 50319 (515-292-9041; carlene.lodermeier@iowa.gov).

9. Development of Evaluation Framework for the Teaching with Primary Sources Program, The Library of Congress (2008-10)

The Library of Congress's Teaching with Primary Sources program works with a national consortium of schools, universities, libraries, and foundations to help teachers use the Library's vast collection of digitized primary sources to enrich their classroom instruction. As part of this contract, EPI formulated and tested metrics for the program to evaluate the effectiveness and ultimately the impact of program methods and content, including curriculum, pedagogy, and delivery modes on teacher knowledge and practice. EPI also assisted The Library staff in managing the piloting of teaching materials, especially teacher-created lesson plans, in preparation for a summative evaluation of this program to be conducted in 2011. *Contact:* Ms. Vivian Awumey, Educational Resources Specialist, Library of Congress, 101 Independence Ave., S.E., Washington, DC 20540-1300 (202-707-8740; vawu@loc.gov).

10. Evaluation of the Teacher Immersion Residency Teacher Quality Partnership Grant, Old Dominion University, Norfolk, Virginia (2009-2013)

EPI serves as the external evaluator for this federally-funded grant to improve the quality of teaching in high-needs schools in southeastern Virginia. This initiative builds on successful teacher residency models that recruit candidates with undergraduate degrees in high-need content fields, immerse them in an induction program housed in an urban school, provide them mentoring and instruction founded on research, and continue to offer professional development during the early years of their careers. As part of its evaluation of this initiative, EPI assesses project outputs (e.g., program completion requirements), short-term outcomes (e.g., retention in high needs schools), and long-term outcomes (e.g., improved student achievement) using a mixed methods evaluation design that includes data collection through teacher interviews and focus groups, classroom and program observations, as well as analysis of student achievement, graduation, and personnel data. *Contact:* Dr. Sharon Judge, Project Director, Old Dominion University, Darden College of Education, Norfolk, VA 23529 (757-683-3938; sjudge@odu.edu).

11. Newport News Public Schools Teaching American History (TAH) Evaluation, Newport News Public Schools (2009-2014)

EPI's work began with consultation on the program design for this project, during the application phase. Since the award of this project, EPI's work has included the development, administration, and analysis of a teacher knowledge assessment (using NAEP and AP test items) and an instructional practice survey; the development and analysis of a classroom observation protocol to measure teacher use of differentiated instructional strategies and student engagement, the facilitation of focus groups to assess the utilization of professional learning teams (PLTs) and use of differentiated instructional strategies, analysis of teacher use of online social network participation, review of teacher PLT products, and the collection and analysis of student achievement and AP enrollment data. EPI completes the status charts for the annual report and provides narrative reports to the project director. *Contact:* Ms. Varinda Robinson, TAH Project Director, 12465 Warwick Boulevard, Newport News, VA 23606 (757-591-4902; Varinda.Robinson@nn.k12.va.us).

12. Miami University of Ohio Teaching American History (TAH) Evaluation, Miami, OH (2010-2015)

EPI was recently awarded this contract to design and evaluate the TAH initiative across 15 districts in Ohio. EPI's work began by completing an evaluation plan and writing the evaluation narrative for the federal grant proposal. Since the award was made, EPI has collaboratively developed the teacher knowledge assessment and an instructional practice survey to assess the use of best practices, collaboration in PLTs, and student engagement. In addition, we will develop a classroom observation to further assess these areas. Each year, we will collect these data from Miami and statistically analyze the findings for significant changes in teacher knowledge and student outcomes. In addition, we will provide the federal annual status charts including conclusions and recommendations for implementation. *Contact:* Mr. Martin Johnson, TAH Project Director, 1601 University Boulevard, Room 572 Mosler Hall, Hamilton, Ohio 45011 (513-785-3273; MartinJohnson@muohio.edu).

13. Richmond County Public Schools Teaching American History (TAH) Evaluation, Richmond, VA (2010)

EPI was contracted to evaluate the final year of the Richmond County TAH initiative and to prepare the final report for the federal government. As part of this contract, Richmond provided EPI with: teacher knowledge assessment scores, attendance rosters from all events, teacher certification data, teacher lesson plans, teacher and student ratings of appreciation of history, and student achievement scores. EPI provided data analysis for each of these outcomes and completed the status charts required for the federal report. In addition, EPI worked collaboratively with the TAH Director and staff to successfully complete all federally required components for this grant. *Contact:* Ms. Lounelle Beecher, TAH Project Director, 864 Broad Street, Augusta, GA 30901 (706-826-1000, ext 3128; beechlo@boe.richmond.k12.ga.us).

14. Improving Teacher Quality State Grants, School-University Research Network, College of William and Mary, Williamsburg, VA (2008-2011)

EPI was contracted on three occasions as an external evaluator for this state-funded NCLB Title II Improving Teacher Quality grant. This multi-district initiative seeks to improve the use of evidence-based adolescent literacy strategies. *Contact:* Dr. Jan Rozzelle, Executive Director, School-University Research Network, College of William and Mary, P.O. Box 8795, Williamsburg, VA 23187-8795 (757- 221-2336; mjrozz@wm.edu).

- **Division Leadership Support Team Project (2010-2011).** Most recently, EPI was contracted to assess the quality of the training provided to regional division coaches, effectiveness of the coaching provided to schools, and the fidelity of division plan implementation. EPI is conducting an ongoing formative evaluation which will inform the project co-directors whether the program is implemented as planned and expected progress is made, to assist with improved implementation. Assessments of outcomes will be derived from surveys regarding training and coach factors (e.g., knowledge, efficacy), observations of trainings and coaching, review of time and effort logs completed by coaches, and interviews and focus groups with directors and coaches.
- **Evaluation of Let's Talk about Leadership and Learning Professional Development Initiative (2009-10).** This program coached school administrators to conduct classroom observations to collect specific data on use of literacy strategies and provided specific, formative feedback to teachers. Among its tasks, EPI collaborated with project staff on the development of data collection instruments, analyzed data, and produced interim and summative reports. These reports summarized: the quality and frequency of observations and instructional feedback given to teachers, knowledge of highly effective instructional strategies for increasing adolescent literacy and mathematics achievement, teacher reflection through the provision of observational data, and technology use.
- **Summative Evaluation of Adolescent Literacy Professional Development Initiative (2008).** The goal of this initiative was to improve adolescent literacy across core subjects in high-poverty middle schools across southeastern Virginia through the consistent use of highly effective instructional strategies and the development of both administrator and teacher leadership capacity. EPI analyzed data collected through surveys, interviews, classroom observations, student assessments, and teacher lesson reviews. Outcomes examined were teacher attendance and participation, teacher knowledge of evidence-based instructional strategies, teacher participation in learning communities, administrator instructional leadership, and student achievement.

15. Impact Analysis of the Knowledge is Power Program, KIPP Foundation (2005)

KIPP schools are tuition-free, open-enrollment, college preparatory public schools, serving high-need communities. EPI conducted a preliminary impact evaluation of the KIPP Schools by comparing school-level Stanford 9 and Stanford 10 (SAT) data supplied by the KIPP Foundation to national growth on this test. The study found that 5th-grade cohorts at KIPP schools posted greater than average academic gains on the SAT reading, lan-

guage, and mathematics testing, a finding consistent with prior research on KIPP schools. EPI published this report in August 2005 and can be found at <http://www.educationalpolicy.org/pdf/kipp.pdf>. *Contact:* Mr. Steve Mancini, Public Affairs Director, KIPP Foundation (415-531-5396; smancini@kipp.org).

16. Evaluation of the Pilot Communities for Infant and Toddler Social, Emotional, and Behavioral Development Grant, Virginia Department of Social Services, Richmond, VA (2010-11)

EPI is the current evaluator for this infant and toddler community outreach initiative funded through the Virginia Department of Social Services (VDSS). The goal of this project is to create pilot communities in an effort to improve the access of child care providers to community resources to support the healthy social, emotional, and behavioral development of infants and toddlers (birth to 36 months of age), especially those at risk; and increase the capacity and competence of child care providers to recognize and address the social, emotional, and behavioral development of infants and toddlers in their care. With this evaluation EPI is working with one of the seven pilot communities to coordinate and design a rigorous process and impact evaluation. EPI is responsible for designing data collection instruments; data collection from health services providers, teachers, caregivers and other practitioners; data analysis; and reporting. *Contact:* Ivy Mitchell, Project Director, Pre-school Partners, 321 Main Street, Suite A, Newport News, VA 23601 (757-240-2731).

17. Evaluation of Elementary and Secondary School Counseling Program, School Board of Osceola County, Kissimmee, FL (2009-11)

EPI is the external evaluator the Innovative Support for Transitions and Educational Preparation (I-STEP) program, supported by an Elementary and Secondary School Counseling Program grant award from the US Department of Education. This pilot project, implemented at four high schools and their feeder schools, provides transitional supports to reduce 8th and 9th grade retentions and increase the number of students who pass the FCAT in the 10th grade. As part of its evaluation, EPI collects, analyzes, and reports data on program implementation and impact, including the effectiveness of I-STEP strategies in closing the gap between their student-to-mental health professional ratios and decreasing school-based disciplinary referrals. *Contact:* Ms. Teresa Stone, Grants Management, School District of Osceola County, 817 Bill Beck Boulevard, Kissimmee, FL 34744-4495 (407-870-4058, Ext. 65109; stoneter@osceola.k12.fl.us).

18. Evaluation of the Hampton GEAR UP Program, Hampton City Schools, Hampton, VA (2008-14)

EPI is the evaluator of the Hampton City Schools (VA) GEAR UP partnership grant, awarded in July 2008. This six-year initiative supports improvements in academic rigor, STEM (science, technology, engineering, and mathematics) career exploration, and parent involvement, as well as an expansion of the district's AVID tutoring program for a double cohort of students in two high-poverty middle schools. EPI's core responsibilities in this project include survey development, technical assistance, data analysis, and preparation of annual and biennial evaluation reports. Outcomes include increased student completion of course requirements and scoring on state testing in math and English; attendance, promotion, and graduation rates; and parent familiarity with academic and financial preparations for postsecondary education. *Contact:* Dr. Donna Woods, Executive Director of Secondary School Leadership, Hampton City Schools, 1 Franklin Street, Hampton, VA 23669. (757-727-2006; dwoods@sbo.hampton.k12.va.us).

19. Formative Evaluation of the Prudential Foundation New Jersey Youth Initiative, Prudential Foundation of New Jersey, Newark, NJ (2003-04)

EPI evaluated three educational outreach programs including the ASPIRA of NJ program, the Boys and Girls Club of Newark, and the Princeton-Blairstown project. These programs targeted urban, at-risk youth (i.e., with academic grades of a "C" or worse) in grades 8 and 9. The evaluation included the development, administration, and analysis of a student survey. The purpose of the evaluation was to design and collect information to benchmark student achievement and reported attitudes towards the three programs. *Contact:* Mr. William Colon, Executive Director, ASPIRA of New Jersey, 390 Broad St., 3rd Floor, Newark, NJ 07104 (973-481-2522; williamcolon@optonline.net).

Postsecondary Education

1. OSEP Personnel Development Program (PDP) Data Collection System, and Scholar Data Report (SDR) and Service Obligations Tracking System (SOTS), Office of Special Education Programs (OSEP), U. S. Department of Education, Washington, DC (2012-2017)
2. Consulting Services to Assess Demographic Trends in the Commonwealth of Virginia in Relationship to Student Enrollment and Retention, Old Dominion University, Norfolk, VA (2012-13)
3. Assessing Program Performance and Planning Next Steps for the Title VI UISFL, BIE and NRC Programs, US Department of Education, Washington, DC (2011-12)
4. Evaluation of the European Union Centres Programme in the Industrialised Countries, The Evaluation Partnership Limited/The European Union (2010)
5. Analysis of the Individual and Societal Economic Benefits of a Kaplan Higher Education (KHE) Education, Kaplan Higher Education (2010)
6. Postsecondary Graduation Rates Study, Imagine America Foundation, Washington, DC (2008-09)
7. Latino Students and the Educational Pipeline, Lumina Foundation for Education, Indianapolis, IN (2005)
8. The Role of College Access Programs in College Completion, TG Public Benefit Grant, Round Rock, TX (2010-11).
9. Evaluation of Title III Strengthening Institutions Grant, Ohio Dominican University, Columbus, OH (2008-2013)
10. Formative Evaluation of the King Faisal Foundation's University Preparatory Program (UPP), Riyadh, Saudi Arabia, Amideast, Washington, DC (2008)
11. Changes in Tuition Policy: Natural Policy Experiments in Five Countries, Canada Millennium Scholarship Foundation, Montreal, QC (2004)
12. Measuring Up 2008, A Midwestern Perspective on the National Report Card, Midwestern Higher Education Compact (MHEC), Minneapolis, MN (2009)
13. Measuring the Effectiveness of Student Aid, Canada Millennium Scholarship Foundation, Montreal, QC (2005-09)
14. Evaluation of the National Action Council on Minorities in Engineering (NACME) Scholars Program, NACME, White Plains, NY (2006-07)
15. Kentucky Postsecondary Education Comprehensive Affordability Analysis, Kentucky Council on Postsecondary Education, Lexington, KY (2006)
16. California Trends in Student Aid: 1994-95 to 2003-04, EdFund, Rancho Cordova, CA (2006)

1. OSEP Personnel Development Program (PDP) Data Collection System, and Scholar Data Report (SDR) and Service Obligations Tracking System (SOTS), Office of Special Education Programs (OSEP), U. S. Department of Education, Washington, DC (2012-2017)

Educational Policy Institute, in partnership with Westat, is contracted to develop a web-based system to improve the efficiency and effectiveness of data collection, analysis, and reporting of data for the Scholar Data Report (SDR) and Service Obligations Tracking System (SOTS) for the Office of Special Education Programs (OSEP). A major piece of the contract is an evaluation of the Special Education Personnel Development program to determine its efficacy in meeting its goals, as well as its ability to meet service obligations. EPI/Westat will track the eligible employment of consortium scholars and obligees. A supplementary piece of the contract is to develop a similar system for the Office of Elementary and Secondary Education's Office of Indian Education (OIE) for use with its Indian Education Professional Development (IEPD) Discretionary Grant Program.

2. Consulting Services to Assess Demographic Trends in the Commonwealth of Virginia in Relationship to Student Enrollment and Retention, Old Dominion University, Norfolk, VA (2012-13)

Educational Policy Institute was hired to assess the geographic and demographic characteristics, higher education interests and delivery medium preferences, and student trends and perceptions in the Commonwealth of Virginia and surrounding states as they relate to Old Dominion University's plans to effectively target student enrollment and retention. The goal of the project is to help ODU optimize course offerings and meet enrollment targets among specific student populations, effectively plan facilities use to meet growing demands for specific programs, increase the academic profile of ODU and successfully recruit and retain the students necessary to warrant expansion of satellite locations, and accurately predict numbers of potential students in each market. To do this, Educational Policy Institute conducted a thorough and comprehensive demographic profile analysis and developed a market analysis based on surveys, focus groups, and recruitment studies. The final product will help ODU direct recruitment and marketing efforts for ODU for many years beyond this project.

3. Assessing Program Performance and Planning Next Steps for the Title VI UISFL, BIE and NRC Programs, US Department of Education, Washington, DC (2011-12)

EPI was contracted to develop and implement a comprehensive plan for analysis and formative assessment of the Undergraduate International Studies and Foreign Language (UISFL), Business and International Education (BIE), and National Resource Centers (NRC) Programs. The UISFL, BIE and NRC programs are authorized under Title VI of the Higher Education Act of 1965, as amended, and were subsequently reauthorized under the Higher Education Opportunity Act (HEOA) in August 2008. The grantees that are to be reviewed for this assessment are the Fiscal Year (FY) 2000 – 2008 awardees. For the project, EPI is working closely with staff from the Department of Education's program on International and Foreign Language Education (IFLE) to conduct focus groups and/or individual interviews with various stakeholders; refine, pilot, and administer surveys to project directors; analyze annual reports from grantees; convene meetings with Technical Advisory Groups; conduct thorough formative assessments; develop sustainable evaluation strategies; and familiarize IFLE staff with the evaluation design. *Contact:* Ms. Amy Wilson, Senior Program Officer, IFLE, U.S. Department of Education, Office of Postsecondary Education, 1990 K Street, N.W., Washington, DC 20006-8521 (Amy.Wilson@ed.gov).

4. Evaluation of the European Union Centres Programme in the Industrialised Countries, The Evaluation Partnership Limited/The European Union (2010)

In partnership with The Evaluation Partnership Limited, EPI is contributing to an international evaluation of the European Union (EU) Centres Initiative. This international initiative, spanning the US, Canada, Japan, Korea, Australia, New Zealand, and Singapore, aims to promote a greater understanding of the EU, its institutions, and policies through the establishment of EU Centres at universities providing information and educational activities. Currently, there are 26 EU Centres in 8 industrialized countries, including 10 in the US and 5 in Canada. The international evaluation assesses the extent to which the Centres meet their specific objectives and examines the desirability and feasibility of continuing the initiative. EPI acted as a local consultant in Canada and the

US and led site visits to Centres. Following the visits, a report for each site was provided summarizing the findings and providing recommendations for possible revision of the format (e.g., geographical spread and number of Centres in the network, type of measures, and improvements in the management and financial framework). EPI will also contribute to the final evaluation report. *Contact:* Andrea Kobilsky, The Evaluation Partnership Limited, 83 Baker Street, London, United Kingdom W1U 6AG (+44 (0) 20 7034 7026; Andrea.Kobilsky@evaluationpartnership.com).

5. Analysis of the Individual and Societal Economic Benefits of a Kaplan Higher Education (KHE) Education, Kaplan Higher Education (2010)

EPI conducted a series of analyses using multiple databases including: the Beginning Postsecondary Students (BPS), National Student Clearinghouse (NSC), KHE archival, and multiple state income and employment datasets. In addition, EPI conducted a survey of first-time postsecondary students in a 2003-4 cohort to facilitate comparisons of KHE students to the national 2003-4 BPS cohort, using the six-year (2009) follow-up. Statistical analyses were conducted to compare student degree completion; students' pathways from their initial enrollment in Kaplan to their attainment of degree; short, medium, and long-term cohort default rates; employment; and wages for students attending KHE to other higher education sectors. A report was provided to KHE summarizing the findings on each of these outcomes. BPS comparisons for 2009, and therefore a report, are pending until the release of these data. *Contact:* Mr. Steve Erlebacher, Vice President, Kaplan Higher Education Corporation, 311 S. Wacker, Suite 3300, Chicago, IL 60606 (312-385-1220; serlebacher@kaplan.edu).

6. Postsecondary Graduation Rates Study, Imagine America Foundation, Washington, DC (2008-09)

Using statistics from the US Department of Education, EPI analyzed the graduation rates of students attending postsecondary institutions. The study examined the extent to which graduation rates for institutions can be predicted within certain ranges of student body demographics, and determined whether certain types of institutions have graduation rates that are significantly above those expected rates. As part of this project, EPI prepared a detailed literature review of the factors associated with postsecondary student drop-out, persistence, and degree attainment. *Contact:* Ms. Jenny Faubert, Manager of Marketing and Project Development, Imagine America Foundation, 1101 Connecticut Ave. N.W. Suite 901, Washington, DC 20036 (202-336-6743; jennyf@imagine-america.org).

7. Latino Students and the Educational Pipeline, Lumina Foundation for Education, Indianapolis, IN (2005)

Using SPSS, EPI analyzed quantitative data from the U.S. Department of Education's National Educational Longitudinal Study (NELS) in order to document the progress of Latino students from eighth grade to the workforce. The study included a multiple regression analysis of the major factors that impede the road to a bachelor's degree for Latino students. The final report, entitled *Latino Students & the Educational Pipeline*, was published in April 2005. *Contact:* Dr. Tina Gridiron Smith, Program Officer, Lumina Foundation for Education, Indianapolis, IN (317-951-5344; tsmith@luminafoundation.org).

8. The Role of College Access Programs in College Completion, TG Public Benefit Grant, Round Rock, TX (2010-11).

EPI is utilizing a mixed methods approach to explore the ways in which college access organizations partner with higher education institutions to get students into and persisting in college. Through national survey of college access programs, EPI will develop a directory of all college access respondents and will highlight the population they serve, the location and mode of service delivery, and the funding mechanisms which support these programs. Based on the survey responses, EPI will also follow-up with selected programs and develop an in-depth case study to identify and describe successful programs, common practices, and promising practices to be replicated at other sites. *Contact:* Kristin Boyer, Director of Public Benefit Grants, TG, EDALL/3-4, 3500-C Wadley Place, Ste. 303, Austin, TX, 78728-1244 (512-219-4990; kristin.boyer@tgsllc.org).

9. Evaluation of Title III Strengthening Institutions Grant, Ohio Dominican University, Columbus, OH (2008-2013)

EPI was contracted by Ohio Dominican University to serve as the evaluator of its federally-funded Title III, Part A, Strengthening Institutions grant, which supports institutions of higher education serving low-income stu-

dents by providing funds to improve and strengthen the academic quality, institutional management, and fiscal stability of eligible institutions. Ohio Dominican is focusing on improving its freshman retention rate and overall retention rate of African American students. As part of the grant evaluation, EPI conducts quarterly focus groups with faculty, students, administrators, and staff regarding implementation and collects archival data on student outcomes. EPI will prepare a final summative evaluation report on the implementation as well as student retention and achievement outcomes. *Contact:* Mr. Jamie Caridi, Vice President for Student Development and Dean of Retention, Ohio Dominican University, Columbus, OH (614-251-4595; caridij@ohiodominican.edu).

10. Formative Evaluation of the King Faisal Foundation's University Preparatory Program (UPP), Riyadh, Saudi Arabia, Amideast, Washington, DC (2008)

This program, initiated in September 2007, was intended to prepare Saudi and other students for the academic rigor of the new Al Faisal University. The formative evaluation of the UPP was designed to identify challenges and issues within the program and suggest improvements on the efficacy, efficiency, and ultimately, academic output of the program. EPI staff conducted an eight-day site visit, which included focus groups with students and faculty, and provided a report discussing the issues related to the UPP as evidenced by the researchers, and recommendations for improvement. *Contact:* Ms. Leslie Nucho, Vice President, AMIDEAST, Washington, DC (202- 776-9624; lnucho@amideast.org).

11. Changes in Tuition Policy: Natural Policy Experiments in Five Countries, Canada Millennium Scholarship Foundation, Montreal, QC (2004)

This international study reviewed tuition and fee policy changes and strategies in five countries and nine jurisdictions. The purpose of the review was to gain insight into the impact of various tuition policies around the world in terms of enrollment, participation, and tuition pricing. Therefore, EPI collected and analyzed data on fees, enrollment, public post-secondary expenditures, and post-secondary participation rates from each jurisdiction. To the extent possible, data preceding and following the policy changes were collected in an attempt to define the trend. A case study methodology was used to illustrate the impact of tuition policy on enrollment however freezing, reducing, or introducing tuition fees could not be predictably linked to enrollment trends. This report was published in May 2004 and can be found at <http://www.educationalpolicy.org/pdf/tuitionpolicy.pdf>.

12. Measuring Up 2008, A Midwestern Perspective on the National Report Card, Midwestern Higher Education Compact (MHEC), Minneapolis, MN (2009)

EPI was contracted to assist MHEC with this biennial report that examined how member states of the MHEC fare individually when compared to each other (intra-region), and collectively relative to other parts of the country (inter-region) in the categories of higher education preparation, participation, affordability, completion, and benefits. Data for Measuring Up were provided by the US Census Bureau and Department of Education. In total, 36 quantitative measures were used to analyze the five performance categories, from which states were given a letter grade ranging from A (a score of 93 or above) to F (a score below 60). The report highlights gaps in the postsecondary completion rates nationwide and provides implications for policy. This report was published in October 2009 and can be found at: http://www.educationalpolicy.org/publications/pubpdf/2009_MHEC.pdf. *Contact:* Dr. Christopher Rasmussen, Vice President for Research and Policy Analysis, 1300 South Second Street, Suite 130, Minneapolis, MN 55454-1079 (612-625-2431; chrisr@mhec.org).

13. Measuring the Effectiveness of Student Aid, Canada Millennium Scholarship Foundation, Montreal, QC (2005-09)

The MESA Project was a four-year, \$4 million research project ran by EPI with the collaboration of the Queen's University School of Policy Studies and Acumen Research. The project aimed to measure the impact and cost effectiveness of bursaries for low-income students on access to and persistence in postsecondary education. EPI took three steps in completing this evaluation: (a) examined, longitudinally, the student aid files of recipients of the Access Bursaries and those who narrowly missed the criteria, and by developing and administering a survey to this same group of students and then subsequently linking the survey and the administrative file,

(b) fully utilized existing databases such as Statistics Canada's Post-Secondary Education and Participation Survey (PEPS), Youth in Transition Survey (YITS), the Longitudinal Administrative Database (LAD), and the Enhanced Student Information System (ESIS), to examine the effects of student assistance on access to and persistence in postsecondary education), and (c) conducted random assignment experiments involving extra financial resources for low-income students. This was the first major research project in Canada to link student aid administrative data, survey data, and databases such as ESIS to investigate the long-term effects of grants. The findings of this project resulted in three annual reports, 16 research papers, 10 forthcoming papers, and a book. Contact: Mr. Andrew Parkin, Director of Research and Program Development, Canada Millennium Scholarship Foundation, 1000 Sherbrooke Street West, Suite 800, Montreal Quebec, H3A 3R2, Canada (514-985-0026; aparkin@bm-ms.org).

14. Evaluation of the National Action Council on Minorities in Engineering (NACME) Scholars Program, NACME, White Plains, NY (2006-07)

EPI, in partnership with the American Association for the Advancement of Science (AAAS), conducted a formative evaluation of the NACME Block Grant Program to determine whether the program rose minority achievement at the Block Grant schools. In addition to analyzing institutional data on student retention and achievement, EPI conducted site visits and case studies of three participating institutions to explore student enrollment, retention, and graduation performance, as well as the support structures that these institutions implemented for scholarship recipients. Sources of data included interviews and focus groups with key stakeholders, policy and program documents, and institutional data. EPI's work on this evaluation involved web-based data collection from project directors at all institutions participating in the program. Recommendations to NACME on how to improve this program were provided. *Contact:* Dr. Daryl Chubin, American Association for the Advancement of Science (AAAS), Washington, DC (202-326-6785; dchubin@aaas.org).

15. Kentucky Postsecondary Education Comprehensive Affordability Analysis, Kentucky Council on Postsecondary Education, Lexington, KY (2006)

EPI was subcontracted by JBL Associates to conduct a study of high school and college students for the Kentucky Council on Postsecondary Education. This included the development of two survey instruments based on the National Beginning Postsecondary Students survey, the administration of these surveys to over 5,000 students at over 40 schools/institutions, and the analysis of these data. In particular, EPI focused on evaluating the cost of tuition at all schools, community colleges, and universities in Kentucky. *Contact:* Ms. F. Diann Donaldson, Director of Administrative Services, Council on Postsecondary Education, 1024 Capital Center Drive, Suite 320, Frankfort, KY 40601 (502-573-1555; Diann.Donaldson@ky.gov).

16. California Trends in Student Aid: 1994-95 to 2003-04, EdFund, Rancho Cordova, CA (2006)

This analysis documented all available financial aid provided to students attending California institutions for a 10-year period, and included the collection of data from the US Department of Education, the government of California, and public and private California institutions. The report charted trends in enrollment, fees, affordability, and student financial aid across this time span. This report was published by EdFund in March 2006 and can be found at <http://www.educationalpolicy.org/pdf/CaliforniaTrendsInStudentAid.pdf>.

Policy Analysis

1. Engineering Research Policy Briefs, National Action Council on Minorities in Engineering (NACME), White Plains, NY (2012)
2. National Disability Policy: A Progress Report, National Council on Disability (NCD), Washington, DC (2009)
3. Study of Higher Education Statutory and Regulatory Requirements in Canada, DeVry, Inc., Chicago, IL (2009)
4. Improving Educational Outcomes for Students with Disabilities, National Council on Disability, Washington, DC (2006-07)
5. Missouri Students and the Pathways to College, Missouri Higher Education Loan Authority (MOHELA), Chesterfield, MO (2006-07)
6. Evaluation of Reading First Supplemental and Intervention Materials, North Carolina Department of Public Instruction, Raleigh, NC (2006-07)
7. Analysis of the Pathways to College Framework and the No Child Left Behind Act, Pacific Resources for Education and Learning (PREL) and the Pathways to College Network (2005)
8. Is More Better? The Impact of Postsecondary Education on the Economic and Social Well-Being of American Society, Bill and Melinda Gates Foundation, Seattle, WA (2005)
9. The Role of Counseling in Increasing Academic Opportunity in Missouri, Missouri Higher Education Loan Authority (MOHELA), Chesterfield, MO (2005)
10. Improving Educational Outcomes for Students with Disabilities I (2004), National Council on Disability (NCD), Washington, DC (2004)

1. **Engineering Research Policy Briefs, National Action Council on Minorities in Engineering (NACME), White Plains, NY (2012)**
EPI prepared a series of research briefs for NACME on a variety of areas related to engineering education. The two-page briefs included graphs, charts, descriptions, and recommendations for action. The briefs dealt with the following areas: Latino Engineers, African American Engineers, Native American Engineers, Engineering Salaries, Engineering Education Policy, and NACME Scholars. EPI also created the camera-ready artwork using Adobe InDesign CS5.
2. **National Disability Policy: A Progress Report, National Council on Disability (NCD), Washington, DC (2009)**
NCD is required by Section 401 (b) of the Rehabilitation Act of 1973, as amended, to submit annually to the President and Congress a report entitled *National Disability Policy: A Progress Report* (hereinafter referred to as the Progress Report). EPI and its subcontractor, Daniels & Associates, were contracted to provide an overview of the status of the quality of life for people with disabilities in the United States based on input from people with disabilities, and to identify the emerging trends that should point the way for future government disability policy. *Contact:* Dr. Martin Gould, Director of Research and Technology, National Council on Disability, 1331 F. St., NW, Washington, DC 20004 (202-272-2112; mgould@ncd.gov).
3. **Study of Higher Education Statutory and Regulatory Requirements in Canada, DeVry, Inc., Chicago, IL (2009)**
EPI was contracted to conduct a provincial-level study of statutory and regulatory requirements to confer online and on-site undergraduate and graduate degrees in Alberta, New Brunswick, Saskatchewan, Manitoba, Ontario, and British Columbia, Canada. To conduct this study, EPI reviewed government materials and interviewed experts in each province to gain an accurate account of the regulations and requirements for operation as a degree-granting institution. Information regarding the legal operation and credential granting, designation for financial aid, eligibility to receive clients with Labour Market Development Agreements (LMDA) program funding as well as the presence of any specific provincial funds for Aboriginal students was provided for each province. This report informed DeVry's decision-making about whether to open physical or online sites in these provinces.
4. **Improving Educational Outcomes for Students with Disabilities, National Council on Disability, Washington, DC (2006-07)**
EPI and the American Youth Policy Forum conducted a joint evaluation and policy analysis of the impact of No Child Left Behind (NCLB) and the Individuals with Disabilities Education Act (IDEA) on the academic outcomes of students with disabilities and state development of infrastructure and professional development. As part of this research project, EPI conducted case studies of the ten most populous states. Work included interviews with state agency administrators, descriptive analyses of state-level achievement data and graduation and drop-out rates, state policy analysis, review of the capability of state data collection and management systems to track and provide public accountability for outcomes of students with disabilities, and a review of state-level teacher preparation programs, recruitment, and professional development in support of improved academic outcomes. *Contact:* Dr. Martin Gould, Director of Research and Technology, National Council on Disability, 1331 F. St., NW, Washington, DC 20004 (202-272-2112; mgould@ncd.gov).
5. **Missouri Students and the Pathways to College, Missouri Higher Education Loan Authority (MOHELA), Chesterfield, MO (2006-07)**
EPI conducted a qualitative analysis of data collected from focus groups with students on the topic of postsecondary access. The published report presents analysis of a series of over 30 focus groups conducted in Missouri with 7th, 9th, and 11th-grade students and concerns their attitudes toward college and the future. Students were also asked to identify who and/or what influenced their postsecondary plans, as well as the potential barriers they saw to achieving their goals. Recommendations for increasing student awareness of and information about college and making decisions about their future were outlined. *Contact:* Mr. Quentin Wilson (formerly of MOHELA), President & CEO, ALL Student Loan, 6701 Center Drive West Suite 500, Los Angeles, CA 90045 (qwilson@allstudentloan.org).

6. Evaluation of Reading First Supplemental and Intervention Materials, North Carolina Department of Public Instruction, Raleigh, NC (2006-07)

EPI conducted an evaluation of Reading First Supplemental and Intervention Materials, a project that included a review of over 60 supplemental instruction products from vendors across the US which provided K-3 students with reading deficiencies with additional reading support. Each product was reviewed and scored using a rubric developed by EPI. North Carolina was provided with a list of approved programs for schools to integrate into their Reading First initiatives. *Contact:* Bill Frazier, Reading First Special Projects Consultant, North Carolina Department of Public Instruction, Raleigh, NC (919-807-3585; bfrazier@dpi.state.nc.us).

7. Analysis of the Pathways to College Framework and the No Child Left Behind Act, Pacific Resources for Education and Learning (PREL) and the Pathways to College Network (2005)

EPI prepared a formal briefing describing how the No Child Left Behind Act of 2001 and the Pathways Framework could be partnered when developing and evaluating comprehensive programs for schools interested in preparing children not just for the next grade, but for the next steps in their educational careers. The paper laid out the conditions under which the Pathways Framework can be most effective and how those conditions relate to NCLB.

8. Is More Better? The Impact of Postsecondary Education on the Economic and Social Well-Being of American Society, Bill and Melinda Gates Foundation, Seattle, WA (2005)

EPI conducted a literature review and prepared an issue paper that examined the economic and non-economic impacts of higher education on individuals and society as a whole. The literature supports that college graduates receive higher wages, are more likely to be employed, and find jobs more quickly during unemployment (i.e., economic returns) and also enjoy greater life expectancy, health, and quality of life and social status for themselves and their children. EPI published this report in May 2005 and can be found at <http://www.educationalpolicy.org/pdf/gates.pdf>.

9. The Role of Counseling in Increasing Academic Opportunity in Missouri, Missouri Higher Education Loan Authority (MOHELA), Chesterfield, MO (2005)

This report, written for the Missouri Higher Education Loan Authority (MOHELA), presents findings from a review of counseling literature and a focus group conducted by EPI of high school counselors in Missouri. The report documents the challenges that Missouri counselors perceive as most important concerning their role in expanding educational opportunity in the state. The report also includes proposed solutions from Missouri counselors. The conclusion provides a brief summary of how the information in the report addresses the distribution of educational opportunity in the state and goes on to provide a summary table of the challenges and possible solutions. *Contact:* Quentin Wilson (formerly of MOHELA), President & CEO, ALL Student Loan, 6701 Center Drive West Suite 500, Los Angeles, CA 90045 (qwilson@allstudentloan.org).

10. Improving Educational Outcomes for Students with Disabilities I (2004), National Council on Disability (NCD), Washington, DC (2004)

EPI and the American Youth Policy Forum (AYPF) prepared a report for the National Council on Disability to assist policy leaders and stakeholders in identifying, disseminating, and aligning evidence-based outcome producing practices with the Federal Government's commitment to leaving no child behind in the attainment of a free appropriate public education. This paper was prepared as a precursor to a more detailed analysis that EPI and AYPF conducted on behalf of NCD in 2006/07 that provided additional input and recommendations to Congress and the Administration. The paper, entitled *Improving Educational Outcomes for Students with Disabilities*, was published by NCD in May 2004. *Contact:* Ms. Betsy Brand, Director, American Youth Policy Forum, 1836 Jefferson Place, Washington, DC 20036 (202-775-9731; bbrand@aypf.org).

Professional Development

As part of our commitment to public service, we have produced several large conferences and seminars both in collaboration with other organizations and independently. Examples of previous and upcoming conferences and training events organized by EPI are listed below.

National Capitol Summit. EPI's occasional policy summits in Washington, DC highlighting critical issues in education. The Summit features members and staff from Congress and other policymakers and experts in education.

EPI Forum on Education & the Economy. EPI hosted its first Forum in March 2013 in Orlando, FL. Speakers included Arthur Levine (President, Woodrow Wilson National Fellowship Foundation), Nancy Zimpher (Chancellor, SUNY), Lee Fisher (President, CEOs for Cities), Bob Wise (Former Governor and President, Alliance for Excellent Education), Pasi Sahlberg (Ministry of Education, Finland), and many others who spoke about critical issues in K12 and postsecondary education. The Forum supersedes EPI's previous seven annual conferences that focused primarily on student retention in higher education.

Retention 101 Retreats. EPI hosts occasional workshops for postsecondary professionals in the US and Canada. These two-day workshops are designed for higher education administrators and other stakeholders to discuss retention issues, intervention planning, implementation, and monitoring. EPI has hosted 16 Retention 101 retreats since 2005.

Retention Consulting

EPI is a national leader in the field of student retention in higher education and now sponsors studentretention.org, a research-based center to study issues and disseminate information to college administrators, faculty, and other stakeholders regarding student retention and persistence. At the heart of studentretention.org is a web-based, institutional assessment system (see below) that enables retention stakeholders at colleges and universities to assess their institutions' status and ability with regard to serving students and, ultimately, to keep students on course to completing their degree. Examples of projects and publications related to postsecondary student retention and success are provided below.

The Effective Practices in Student Success (EPSS) Database

Since January 2007, EPI has been collecting peer-reviewed information about programs and strategies that help students succeed and persist to degree completion at postsecondary institutions across the US, Canada, and beyond. The EPSS is part of a larger effort by EPI to provide useful information to practitioners that, in turn, will improve practices on campuses. The EPSS differs from other databases by listing only programs with exhibited and documented success in retaining students toward graduation. The database also allows anyone who uses the tool to provide their own rating as to the utility of the information. EPSS serves as a vital resource for campus professionals seeking to improve student retention and success. The project was funded in part by the Texas Guaranteed.

The Institutional Student Retention Assessment (ISRA)

The ISRA is a web-based self-assessment for institutions of higher education developed in 2005 by EPI with funding from the Lumina Foundation for Education. The ISRA is intended to help an institution assess its status with regard to serving students and, ultimately, keep undergraduate students on course to degree. The ISRA queries campus-based stakeholders about their current use of resources, retention strategies and programs, institution-wide characteristics, and policies and practices in the following areas: Institutional Context, Recruitment & Admissions, Financial Aid, Student Services, Academic Services, and Teaching & Learning. By entering this information into a web-based system, stakeholders participate in a process which produces a report illustrating their institution through the lens of student retention.

Direct Consultation Services

EPI provides retention consulting and support for institutions and organizations, working directly with administrators, staff, and faculty to assess current institutional efforts to increase student retention and achievement and provide support in planning, implementing, and monitoring the effects of new strategies and programs. Clients have included Palm Beach Community College, Texas Guaranteed, and the National Court Reporters Association.

Leadership



Dr. Watson Scott Swail, President & CEO

Watson Scott Swail is the President and Chief Executive Officer of Educational Policy Institute, an international research firm dedicated to the high-level study and analysis of critical education issues.

Dr. Swail founded EPI in 2002 to meet a growing need for high-level research on educational opportunity issues. Since that time, EPI has conducted dozens of studies on issues from early childhood reading to postsecondary outcomes for students. EPI's clients have included Lumina Foundation for Education, The Bill & Melinda Gates Foundation, the Canada Millennium Scholarship Foundation, the Texas Education Agency, and several state education organizations and local school districts.

Dr. Swail has a very broad understanding of education. He served as a middle school teacher in Canada and the United States for seven years, while also becoming an expert in curriculum design and teacher professional development. He has worked on school reform initiatives and currently assists several school districts around the country with reforms designed to improve student persistence in middle and high school. In

2000, he directed the National Survey of Outreach Programs while working at the College Board, which surveyed over 1,100 programs around the US. He recently directed the 2010 followup to that survey.

During his doctoral program at The George Washington University, Dr. Swail developed the geometric framework for student retention, which provides an empirically-based model for understanding how students and institutions move toward their mutual and individual goals. This model is used widely around the world for strategic planning in higher education, and is described in his Jossey-Bass publication, *Retaining Minority Students in Higher Education* (2003). In 2006, Dr. Swail chaired the first annual International Conference on Student Success, and conducts the Retention 101 workshops around the globe each year.

Widely respected in the area of college opportunity research, Dr. Swail has published extensively in national journals and publications. Recent publications include *Finding Superman: Debating the Future of Public Education in America* (Teachers College Press, 2012), *A Blueprint for Success: Case Studies of Successful Pre-College Outreach Programs* (EPI, 2012), and *In Search of a Better Mousetrap: A Look at Higher Education Ranking Systems* (AACRAO, 2011), and *Engaging Faculty and Staff: An Imperative for Fostering Retention, Advising, and Smart Borrowing* (TG, 2008).

"Latino Students and the Educational Pipeline," "The Affordability of Higher Education," and "Higher Education and the New Demographics." He has been published in *Phi Delta Kappan*, *Change*, and the *Chronicle of Higher Education*. He is the editor of *The Swail Letter on Higher Education* and *The Journal of Student Success*. He wrote the seminal book on student retention, *Retaining Minority Students in Higher Education* in 2003 (Jossey-Bass).

Prior to establishing EPI, Dr. Swail served as the Founding Director of The Pell Institute and Vice President of the Council for Opportunity in Education in Washington, DC. He previously served as senior policy analyst with SRI International, associate director for policy analysis with the College Board, and a research assistant at The McKenzie Group in Washington, DC. While with the Board, Dr. Swail co-directed the annual *Trends in College Pricing* and *Trends in Student Aid* reports. He is a former technology teacher and taught at Victor Wyatt School in Win-

nipeg, Manitoba, and Benjamin Syms Middle School in Hampton, Virginia, designated as a National School of Excellence by President George H.W. Bush.

In addition to his research and writing, Dr. Swail has taught educational policy and research at The George Washington University in Washington, DC, where he received his doctorate in educational policy. He earned his Master's of Science from Old Dominion University in Norfolk, Virginia, and Bachelor's of Education from the University of Manitoba, Winnipeg, Manitoba.

Dr. Swail currently serves on the research advisory board of the National Action Council on Minorities in Engineering (NACME) and the AVID Postsecondary Advisory Board. He has previously served on the Old Dominion University Darden College of Education Advisory Board, the Council for State Governments' National Advisory Council on Postsecondary Education Access, the Board of Directors of St. Louis-based Student Resource Services, and the Advisory Panel for the National Association for Student Financial Aid Administrators (NASFAA). In 2007 was named a Fellow of the Darden College of Education at Old Dominion University for his "dedicated service and his outstanding contributions in education

Selected Publications

- Swail, Watson S. (Ed.) (2012). *Finding Superman: Debating the Future of Public Education in America*. New York, NY: Teachers College Press.
- Swail, Watson S. (Ed.) (2012). "Finding Superman." In Watson Scott Swail's (Ed.) *Finding Superman: Debating the Future of Public Education in America*. New York, NY: Teachers College Press.
- Swail, Watson S., Quinn, K., Landis, K., and Fung, M. (2012). *2012 Directory of Pre-College Outreach Programs*. Washington, DC: Educational Policy Institute.
- Swail, Watson S., Quinn, K., Landis, K., and Fung, M. (2012). *A Blueprint for Success: Case Studies of Successful Pre-College Outreach Programs*. Washington, DC: Educational Policy Institute.
- Swail, Watson S. (2011). "In Search of a Better Mousetrap: A Look at Higher Education Ranking Systems." *College & University*. AACRAO: Washington, DC.
- Swail, Watson S., Dickerson, Shawn, and White, Rachel (2010). *National Disability Policy: A Progress Report*. Washington, DC: National Council on Disability.
- Swail, Watson S., Broff, Nancy, and Faubert, Jenny (2010). *Graduating At-Risk Students: A Cross-Sector Analysis*. Washington, DC: Imagine America Foundation.
- Swail, Watson S., Broff, Nancy, and Faubert, Jenny (2009, August). "Leveling the Playing Field for All Schools, Including Career Colleges." *Career Education Review*. Oshkosh, WI: Workforce Communications. Pp. 53-58.
- Shaffer, Patricia Moore, and Swail, Watson S. (2009, October). Making Decisions about Teacher Professional Development: Practices in 8 Alabama School Districts. Evidence-Based Education Request Desk, Regional Education Laboratory, Southeast SERVE Center.
- Swail, Watson S., Jaeschke, Sarah, and Rasmussen, Chris (2009, October). *Measuring Up – A Midwestern Perspective on the National Report Card — 2002 to 2008*. Minneapolis, MN: Midwestern Higher Education Compact.
- Swail, Watson S., Mullen, Rebecca, Gardner, Hyniea, and Reed, Jeremy (2008, February). *Engaging Faculty and Staff: An Imperative for Fostering Retention, Advising, and Smart Borrowing*. Round Rock, TX: Texas Guaranteed Student Loan Corporation.
- Swail, Watson S., and Brand, Betsy (2008, January). *The No Child Left Behind Act and the Individuals with Disabilities Act: A Progress Report*. Washington, DC: National Council on Disability.
- Swail, Watson S. (2008, January). *A Clear and Present Danger to Institutional and Student Success: A training model for embedding student loan default aversion within strategic enrollment management*. Round Rock, TX: Texas Guaranteed Student Loan Corporation.
- Swail, Watson S., Willis, Ronald C., and Mullen, Rebecca M. (2007, December). *Decision 2008*. Virginia Beach, VA: Educational Policy Institute.
- Swail, Watson S. and Hosford, Sarah (2007, November). *Missouri Students and the Pathways to College*. Virginia Beach, VA: Educational Policy Institute.
- Baumann, Paul, Cabrera, Alberto, and Swail, Watson S. (2007, October). *An Annotated Bibliography of Latino Educational Research*. Virginia Beach, VA: Educational Policy Institute.
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Recent Presentations

- Swail, Watson S., Darling-Hammond, Linda, Levine, Arthur, Levin, Ben, and Chen, Milton (April 27, 2013). *Finding Superman: Debating the Future of Public Education in America*. Presentation at the 2013 American Educational Research Association (AERA) Conference, San Francisco, CA.
- Swail, Watson S. (November 2, 2012). What does the future hold? A presentation at the Learning to Earning: Higher Education and the Changing Job Market, sponsored by the Higher Education Quality Council of Ontario (HEQCO) and the Educational Policy Institute, November 1-2, 2012, Toronto, ON.
- Swail, Watson S. (May 22, 2012). *Finding Superman... and Other Stories*. A presentation for the Ohio Legislative Caucus, Columbus, Ohio.
- Swail, Watson S., and Quinn, Kate (April 16, 2012). *SciTech—Initial Outcomes of a Magnet-School Start-Up*. A presentation at the AERA Conference in Vancouver, BC.
- Swail, Watson S., Quinn, Kate, & Kalvesmaki, Andrea (April 16, 2012). *Assessing the Effectiveness of a GEAR UP Program: An Evaluative Case Study*. A presentation at the AERA Conference in Vancouver, BC.
- Swail, Watson S., and Quinn, Kate (April 16, 2012). *The Role of College Access Programs in College Completion: Case Studies of Promising Practices*. A presentation at the AERA Conference in Vancouver, BC.
- Swail, Watson S. (October 27, 2011). "Critical Reflections and Comparative Policy Perspectives. Presentation at the *Achieving Equity through Innovation: A Canada-United States Colloquium*, Toronto, ON, sponsored by the Canadian Education Association (CEA) and the Stanford Center for Opportunity Policy in Education (SCOPE).
- Swail, Watson S. (September 23, 2011). Private higher education: Its place in higher education system and its role in development of mass higher education, enhancement knowledge and innovation. Presentation at the Private Higher Education and Its Contribution to Enhancement of Innovation Potential of Europe in the Global Competitive Environment conference, Warsaw, Poland.
- Swail, Watson S. (December 14, 2010). Saving Lives: Strategies that help students prepare, apply, enroll, and succeed in higher education. OCAN/OASFAA Annual Conference, Columbus, OH.
- Swail, Watson S., and Collier, Harvest (November 9, 2010). *Road Map to a Campus-Wide Retention Program*. Presentation at the 2010 AACRAO SEM Conference, Nashville, TN.
- Swail, Watson S. (November 7, 2010). *In Search of a Better Mousetrap: A Look at Higher Education Ranking Systems*. Presentation at the AACRAO Executive Forum, Nashville, TN.
- Swail, Watson S. (October 27, 2010). Closing Keynote at the University of Toronto/Stanford School of Education Conference on Teaching and Learning, Toronto, ON.
- Swail, Watson S. (October 20, 2010). *The Fierce Urgency of Now*. A keynote presentation to the NavityMiguel Conference, Washington, DC.
- Swail, Watson S. (December 9, 2010). *College Readiness and Rigorous Opportunities for All Students*. AVID National Conference, Dallas, TX.
- Swail, Watson S. (May 21, 2010). *Seeding the Knowledge Economy: Education and Economic Development*. Presentation at The Council of State Governments' Economic Summit of the States, New York, NY.

- Svail, Watson S. (April 23, 2010). *Retaining Students in Higher Education*. A presentation to the faculty and staff of Columbus State Community College, Columbus, OH.
- Svail, Watson S. (May 7, 2010). *Defining Student Success at Fanshawe College*. A presentation to the Board of Governors of Fanshawe College, London, ON.
- Svail, Watson S. (Various, 2010). *Importance of K-12 and College Readiness Standards in the United States*. Presentations with the Council of State Governments in Miami, FL (April 18-19), Washington, DC (April 28-29), Chicago, IL (May 2-3), and Honolulu, HI (June 21).
- Svail, Watson S. (November 12, 2010). *America's Educational System Goes Back to School*. Presentation to The Council of State Governments 2009 Annual Conference, La Quinta, CA.
- Svail, Watson S. (September 17-18, 2009). *International Forum on Student Retention*, Bogota, Colombia.
- Svail, Watson S. (October 14, 2009). *Educational Access & Success with an EDGE*. A presentation to Traveler's Insurance, Hartford, CT.
- Svail, Watson S. (October 5, 2009). *Retaining Students in Private Higher Education in Virginia*. A presentation to the Virginia Foundation for Independent Colleges, Charlottesville, VA.
- Svail, Watson S. (August 12, 2009). *A History of College Access & Success*. Ohio College Access Network, Columbus, OH.
- Svail, Watson S. (July 21, 2009). *Evaluation Strategies for GEAR UP Programs*. A presentation at the NCEP National Conference, San Francisco, CA.
- Svail, Watson S. (November 7, 2008). *Retention 101: A Primer with a Plan*. A Keynote Presentation to the Staff of El Centro Community College, Dallas, TX.
- Svail, Watson S. (October 17, 2008). *Talking Progress: Moving from Challenges to Solutions for Latino Students and American Society*. A presentation at the NASPA Student Affairs Administrators in Higher Education Annual Conference, San Antonio, TX.
- Svail, Watson S., Orr, Dominic, Vossensteyn, Hans, and Dobson, Ian (August 27, 2007). *Increasing Student Retention and Persistence in Higher Education: An International Perspective*. A Presentation at the European Association for Institutional Research (EAIR) Conference, Innsbruck, Austria.
- Svail, Watson S. (January 29, 2007). *Evaluation Strategies for College Access Programs*. An online presentation for the National Council Higher Educational Loan Programs (NCHELP).



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