

RFP BHSSA-Evaluation-002

School Behavioral Health Performance Management System

Proposal Submitted to the
Behavioral Health Services Oversight and Accountability Commission

Submitted by:

Santa Clara County Office of Education

1290 Ridder Park Drive, San Jose, CA 95131-2304

(408) 453-6500

Dr. David Toston, Superintendent

March 10, 2026

Total Proposed Contract Value: \$9,000,000

Table of Contents

Table of Contents	2
Attachment 1: Proposal Cover Sheet	4
Attachment 2: Minimum Qualifications	5
B.1. Experience Providing TTA and Capacity Building.....	5
B.2. Evidence of Active Business Status.....	7
Attachment 2-1: References (Minimum Qualifications)	8
Attachment 3: Proposer Background	16
C.1. Experience Providing Performance Management and TTA.....	16
C.2. Experience Shifting Educator Mindsets	29
C.3. Staffing, Operational Capacity, Systems, and Partnerships.....	33
C.4. Staff Experience Designing and Implementing Systems.....	39
C.5. Staff Experience with School Behavioral Health.....	46
Attachment 4: Proposed Workplan	51
Attachment 5: Sample Student Services and Outcomes Report	79
Attachment 6: Cost Sheet	87
Attachment 7: References	88
Attachment 8: Bidder Declaration (GSPD-05-105)	104
Attachment 9: Contractor Certification Clauses (CCC-307)	106
Attachment 10: Darfur Contracting Act Certification	110
Attachment 11: Payee Data Record (STD 204)	112
Attachment 12: Final Submission Checklist	114
Exhibit A (“D” In RFP): Budget And Narrative	115
Exhibit B: Subcontractor Letters of Intent	132
A.1. Stanford School Of Medicine / Graduate School Of Education.....	132
A.2. Impacter Education Corporation.....	135
A.3. Deveau Burr Group (DBG)	138
A.4. Breaking Barriers California.....	142
A.5. Applied Survey Research (ASR)	146

Exhibit C: Key Personnel Resumes.....	150
B.1. David Toston, Ed.D. — Superintendent, SCCOE	150
B.2. Deborah Gorgulho, Ed.D. — Assistant Superintendent, SCCOE	152
B.3. Pilar Vázquez-Vialva, Ed.D — Director IV, SCCOE	154
B.4. David Rehkopf, Ph.D. — Professor, Stanford School Of Medicine	157
B.5. Ben Domingue, Ph.D. — Professor, Stanford School Of Education	163
B.6. Joshua Arnold, Ed.D. — Co-Founder & Co-CEO, IMPACTER	171
B.7. Andrew O. Arnold, Ph.D. — Scientific Advisor (ML & NLP) IMPACTER.....	176
B.8. Andrea Deveau — Managing Partner, Deveau Burr Group.....	181
B.9. Gina Plate — Senior Vice President, Deveau Burr Group.....	183
B.10. Elizabeth Estes — Breaking Barriers California.....	185
B.11. Lisa Colvig-Niclai — Senior Vice President, Applied Survey Research	187

Attachment 1: Proposal Cover Sheet

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RFP BHSSA-Evaluation-002
School Behavioral Health Performance Management System

ATTACHMENT 1: PROPOSAL COVER SHEET

Provide the information below.

Proposer Name	
Santa Clara County Office of Education	
Proposer Address and Telephone Number	
1290 Ridder Park Drive; San Jose, CA 95131-2304 (408) 453-6511	
Name of Authorized Signor (Print)	
Dr. David M. Toston, Sr., County Superintendent of Schools	
Signature of Authorized Signor	Date
Initial:  Signed by: AEEF8FA0C5E741B...	3/6/2026 5:20 PM PST

I HEREBY CERTIFY under penalty of perjury that I have the authority to sign this proposal on behalf of the named Proposer above and that all information provided in this proposal is true and accurate.

I further understand and agree to accept and comply with all the requirements in the RFP and related documents. In addition, if there is any false information in the proposal that it is grounds for the proposal to be rejected, and if any false information comes to light after contract award, that it is grounds for the contract to be terminated immediately.

Program Coordinator Contact Information

Name:	Pilar Vazquez-Vialva
Title:	Director IV, Youth, Health, and Wellness
Email:	pvazquezvialva@sccoe.org
Phone Number:	(669) 212-8672

Attachment 2: Minimum Qualifications

B.1. Experience Providing TTA and Capacity Building

B.1. The Proposer must have at least two (2) years of experience providing TTA and capacity building to LEAs/schools in California. For the purposes of this RFP, only the Proposer can meet the experience requirements. A subcontractor or other entity cannot be used to meet this requirement.

- a. Provide references to support the number of years of performance management TTA experience. A minimum time of one year of experience is required per reference. (Use Attachment 2-1: References (Minimum Qualifications))

Provide support and reference the location in the proposal where the support is located

The Santa Clara County Office of Education (SCCOE) has provided training, technical assistance, and capacity building to LEAs and schools across California for over two decades. The SCCOE is a regional service agency that provides instructional, business, and technology services to the 31 school districts of Santa Clara County. The SCCOE directly serves students through special education programs, alternative schools, Head Start and State Preschool programs, migrant education, and Opportunity Youth Academy. The SCCOE also provides academic and fiscal oversight and monitoring to districts in addition to the 21 Santa Clara County Board of Education authorized charter schools.

The SCCOE's training and technical assistance (TTA) experience spans ten major initiatives.

- Co-Lead, Department of Health Care Services Children and Youth Behavioral Health Initiative (CYBHI) School Linked Partnership and Capacity Grants (\$400M) (2024-27)
- Regional Technical Assistance Center Lead, California Department of Education California Community Schools Partnership Program (2025-28)
- Regional Geographic Lead, California Department of Education, California System of Support (2023-present) and Lead, Differentiated Assistance to Santa Clara County LEAs and charter schools (2023-present)
- Lead, DataZone (2012-present)
- State Lead, California Department of Education LEA Medi-Cal Billing Option Program Technical Assistance Program - (2022-26)

- State Lead, California Collaborative for Educational Excellence (CCEE) California Collaborative for Learning Acceleration (2022-28)
- State Lead, Commission on Teacher Credentialing's Statewide Residency Technical Assistance Center (2023-29)
- State Co-Lead, California Department of Education Charter Authorizer Support Initiative (2021-26)
- State Co-Lead, Special Education Resource Lead: Building Capacity Lead, CDE California Collaborative for Impactful Pathways (2022-28)

The SCCOE's performance management and TTA model emphasizes one-on-one coaching, performance plans, network improvement communities, communities of practice, and work sessions grounded in continuous improvement methodology structures that translate directly to the BHPM technical assistance this project requires.

See Attachment 2-1 for references supporting a minimum of two years of performance management and TTA experience. See Section C (Proposer Background) for additional details on SCCOE's qualifications.

B.2. Evidence of Active Business Status

- B.2. Evidence that Proposer is registered to do business in California. The support can be provided with a copy or screen shot of your California Secretary of State certification showing an "Active Status". This can be found at: <https://bizfileonline.sos.ca.gov/search/business>.

Reference the location in the proposal where the support is located

Santa Clara County Office of Education (CDS Code: 43-10439-0000000) is a public educational agency established under California Education Code §1000 et seq. As a governmental entity, SCCOE is not required to register as a business with the California Secretary of State and does not appear in the Secretary of State business database.

Documentation of the SCCOE's active status as a California public educational agency is provided in two forms:

1. **Federal Employer Identification Number (FEIN):** Per Q&A Response #1, a Federal Tax ID Number is acceptable as evidence of active business status for governmental entities. SCCOE's FEIN is: 77-0272168.
2. **California Department of Education School Directory:** The CDE directory confirms SCCOE as an active county office of education. CDS code is 43-10439-0000000.

The screenshot shows the California School Directory page for the Santa Clara County Office of Education. The page includes a search bar, a list of resources, and a detailed profile for the county office. The profile lists the following information:

County	Santa Clara
District	Santa Clara County Office of Education List of active district schools
CDS Code	43 10439 0000000
District Address	1290 Ricker Park Dr. San Jose, CA 95131-2304 Google Map
Mailing Address	1290 Ricker Park Dr. San Jose, CA 95131-2304
Phone Number	(408) 453-4800
Fax Number	Information Not Available
Email	dschool@sccoe.org
Web Address	www.sccoe.org
Superintendent	Dr. David Tustin Superintendent (408) 453-4800 dtustin@sccoe.org
Chief Business Officer	Stephanie Gorman Assistant Superintendent-Business Services (408) 453-4819 sgorman@sccoe.org
Status	Active
District Type	County Office of Education (COE)
Low Grade	#
High Grade	12
NCEIS Federal District ID	0691025
Statistical Info	Link to District Profile
CDS Coordinator (Contact for Data Updates)	Cynthia Roman (408) 453-4802 Request Data Updates
Last Updated	May 22, 2025

On the right side of the page, there is a "Share this Page" section with social media icons and a "Resources" section with links to various CDE services and publications.

Attachment 2-1: References (Minimum Qualifications)

REFERENCE #1

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RFP BHSSA-Evaluation-002

School Behavioral Health Performance Management System

ATTACHMENT 2-1: REFERENCES (Minimum Qualifications)

Reference for: Santa Clara County Office of Education

Organization Name:	California Collaborative for Educational Excellence
Time Period the Reference Covers (A minimum time of one year of experience is required per reference)	2018 – Present (7+ years)
Service Provided: (Must be related to providing performance management training and technical assistance)	SCCOE has served as a direct partner of the California Collaborative for Educational Excellence (CCEE) in collaborating on several initiatives through the Statewide System of Support (SSOS). SCCOE is a lead on the Learning Acceleration System Grant (LASG), collaborates on Direct Technical Assistance, has served as a key partner in the Social Emotional Learning workgroup to support data analysis on whole child outcomes, and more recently co-developed the Ecosystem of Care Toolkit. Through these partnerships, SCCOE provided performance management technical assistance to LEAs including, but not limited to the following: facilitation of statewide and regional convenings bringing LEA teams together to share practices and build peer learning networks; individualized one-on-one coaching with LEA leadership teams on literacy and mathematics instruction; structured data dives and support into LEA performance helping district leaders identify root causes and set measurable improvement goals; development of frameworks and tools for measuring student academic and behavioral health outcomes; support for LEAs in establishing partnerships with non-educational stakeholders including community-based organizations, health agencies, and social services providers; and facilitation of professional learning communities where LEA teams worked collectively on integrating academic and behavioral health findings into LCAP goal-setting and continuous improvement planning. This work

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RFP BHSSA-Evaluation-002

School Behavioral Health Performance Management System

	required the same core performance management disciplines proposed in this project: structured needs assessment, measurable goal-setting, data-driven progress monitoring, stakeholder engagement, and ongoing coaching to build sustainable LEA capacity. SCCOE is a leader in supporting LEAs in youth behavioral health and we strongly recommend them for this opportunity.
Reference Contact Name and Title:	Matthew J. Navo, Executive Director
Reference Contact Phone Number:	916-619-7488
Reference Contact E Mail Address:	mnavo@ccee-ca.org

DocuSigned by:

*Matthew Navo***Reference Signature**

3/6/2026

Date

REFERENCE #2



RFP BHSSA-Evaluation-002

School Behavioral Health Performance Management System

ATTACHMENT 2-1: REFERENCES (Minimum Qualifications)

Reference for: Santa Clara County Office of Education

Organization Name:	Sonoma County Office of Education
Time Period the Reference Covers (A minimum time of one year of experience is required per reference)	03/1/2024– Present (2 years)
Service Provided: (Must be related to providing performance management training and technical assistance)	Sonoma County Office of Education acknowledges the Santa Clara County Office of Education's (SCCOE) statewide leadership through the Children and Youth Behavioral Health Initiative (CYBHI). In partnership with the Sacramento County Office of Education, SCCOE oversees statewide fund distribution for the CYBHI School Linked Partnership and Capacity Grants and supports all 58 county offices of education and their LEAs in building operational readiness for the CYBHI fee schedule. SCCOE's performance management TTA includes one-on-one coaching with COE leadership, weekly office hours, funding guidance documentation, communities of practice, and structured progress monitoring against individualized LEA implementation plans. Success is measured by LEAs successfully billing the CYBHI fee schedule and being reimbursed, which requires meeting benchmarks for Medi-Cal enrollment, provider credentialing, NPI registration, data privacy compliance, electronic health record readiness, and claims submission infrastructure. SCCOE has also served as a consultant on high-quality EHR selection and implementation. This statewide behavioral health infrastructure work is foundational to the school-based behavioral health performance management system this RFP establishes. SCOE also recognizes SCCOE's leadership in supporting Community Schools implementation as the Bay Area Community Schools Regional Technical Assistance



RFP BHSSA-Evaluation-002

School Behavioral Health Performance Management System

	Center. SCCOE provides resources, tools, and coordinated learning opportunities that help LEAs integrate academics, health and social services, youth development, and family engagement. These supports strengthen local capacity to understand community needs, build integrated support systems, and sustain high quality Community Schools practices across the region.
Reference Contact Name and Title:	Amie R. Carter, Ed.D., County Superintendent of Schools
Reference Contact Phone Number:	707-524-2603
Reference Contact E Mail Address:	acarter@scoe.org

Electronically signed by: Amie
Carter
Date: Mar 9, 2026 10:13:34 PDT

03/09/2026

Reference Signature

Date

REFERENCE #3



RFP BHSSA-Evaluation-002

School Behavioral Health Performance Management System

ATTACHMENT 2-1: REFERENCES (Minimum Qualifications)

Reference for: Santa Clara County Office of Education

Organization Name:	Morgan Hill Unified School District
Time Period the Reference Covers (A minimum time of one year of experience is required per reference)	2017-2018 SY – Present (9 years)
Service Provided: (Must be related to providing performance management training and technical assistance)	<i>Morgan Hill Unified School District receives Differentiated Assistance from the Santa Clara County Office of Education through California's Statewide System of Support after meeting state-identified criteria on the California School Dashboard. SCCOE provides intensive performance management training and technical assistance designed to strengthen the district's capacity to implement disciplined continuous improvement practices aligned to state accountability priorities.</i> <i>SCCOE support includes collaborative root cause analysis of student outcome data, development of improvement plans with measurable goals targeting specific student groups and Dashboard indicators, and the assignment of a dedicated SCCOE improvement coach. District leadership teams participate in regular data review and performance management sessions that focus on monitoring progress, testing improvement strategies, and refining actions based on evidence. These sessions build district capacity to sustain internal improvement routines, including structured data cycles, leadership alignment, and ongoing progress monitoring.</i> <i>This work has contributed to a notable shift in the district's operational culture. External reflections from the California Collaborative for Educational Excellence (CCEE) indicate that MHUSD has moved from primarily planning improvement to actively practicing improvement. CCEE observed increased district coherence and leadership confidence in implementing improvement strategies, noting that the district has effectively layered new performance management routines into its existing systems.</i> <i>MHUSD continues to demonstrate steady progress in its Differentiated Assistance and school-level improvement work. Two sites remain under active action plans, including Live Oak High School, which has improved sufficiently to exit Additional Targeted Support and Improvement status and is now green across all Dashboard indicators except mathematics. District leadership maintains regular improvement check-ins with SCCOE, and following each I-Ready diagnostic cycle, administrators conduct structured data reviews to inform instructional and strategic adjustments.</i> <i>Mathematics remains a central improvement priority, supported through new instructional frameworks, TK-12 professional learning,</i>



RFP BHSSA-Evaluation-002

School Behavioral Health Performance Management System

	<i>and guidance related to the district's mathematics curriculum adoption. The district's sustained engagement reflects a strong partnership with SCCOE and a commitment to building durable performance management systems. Continued participation in Differentiated Assistance signals not stagnation, but a deliberate effort to institutionalize improvement practices that will support long-term gains in student outcomes.</i>
Reference Contact Name and Title:	Dr. Carmen García, Superintendent
Reference Contact Phone Number:	(408) 201-6001
Reference Contact E Mail Address:	garciacarmen@mhusd.org

A handwritten signature in black ink that reads 'Carmen García'.

Reference Signature

March 9, 2026

Date

REFERENCE #4



RFP BHSSA-Evaluation-002

School Behavioral Health Performance Management System

ATTACHMENT 2-1: REFERENCES (Minimum Qualifications)

Reference for: Santa Clara County Office of Education

Organization Name:	Contra Costa County Office of Education (CCCOE)
Time Period the Reference Covers (A minimum time of one year of experience is required per reference)	2024-25 SY – Present (2.5 years)
Service Provided: (Must be related to providing performance management training and technical assistance)	The Santa Clara County Office of Education (SCCOE), in partnership with the Contra Costa County Office of Education (CCCOE), provides regional leadership and technical assistance through the California Geo Lead system, supporting local educational agencies (LEAs) in strengthening systems of continuous improvement and accountability. Through this collaboration, SCCOE and CCCOE work to coordinate regional supports that build the capacity of districts and county offices to address state and federal accountability requirements while improving outcomes for student groups experiencing persistent inequities. As part of the Geo Lead network, SCCOE contributes to a comprehensive system of regional technical assistance designed to help LEAs implement sustainable improvement practices. These supports include facilitation of regional learning networks, coaching and consultation for district leadership teams, and professional learning opportunities focused on data use, continuous improvement, and effective implementation of Local Control and Accountability Plans (LCAP) and other accountability related initiatives. SCCOE also collaborates with regional partners to align supports across Differentiated Assistance, CSI/ATSI improvement efforts, and other state and federal program requirements. Through its partnership with CCCOE, SCCOE helps coordinate regional communication, disseminate guidance from the California Department of Education, and support districts in using data to identify challenges, monitor progress, and refine improvement strategies. This work emphasizes cross county collaboration, shared learning, and



RFP BHSSA-Evaluation-002

School Behavioral Health Performance Management System

	the development of durable improvement routines that allow districts to sustain progress over time. SCCOE measures the impact of its Geo Lead support through evidence of strengthened district improvement practices, increased capacity for data informed decision making, and stronger alignment between district planning processes and student outcome goals. This regional infrastructure for coordinated support and continuous improvement contributes directly to the performance management and system improvement objectives outlined in this RFP.
Reference Contact Name and Title:	Shannon Ortland, Assistant Superintendent
Reference Contact Phone Number:	(925) 942-3385
Reference Contact E Mail Address:	sortland@cccoe.k12.ca.us

Reference Signature

3/9/26

Date

Attachment 3: Proposer Background

C.1. Experience Providing Performance Management and TTA

C.1. Describe your experience providing performance management, and technical assistance and support to LEAs and schools.

The SCCOE's experience providing performance management, training and technical assistance (TTA), and support to LEAs across the state is demonstrated in the following initiatives:

1. Co-lead grant administrator for the Children and Youth Behavioral Health Initiative (CYBHI) School-Linked Partnership and Capacity Grants (\$400M statewide), delivering technical assistance to all 58 County Offices of Education and their LEAs on building operational readiness for the behavioral health fee schedule including structured goal-setting, progress monitoring, and performance benchmarking at the LEA level. The SCCOE defines success in this work as LEAs successfully billing the CYBHI fee schedule and being reimbursed, which requires meeting measurable operational readiness milestones across Medi-Cal enrollment, provider credentialing, NPI registration, and claims submission infrastructure for three years.
2. Regional Lead (9 counties), CDE Bay Area Regional Technical Assistance Center (RTAC) for the California Community Schools Partnership Program (CCSPP), providing direct technical assistance to COEs and LEAs on community schools implementation, stakeholder engagement, and continuous improvement aligned to LCAP performance goals since 2022.
3. Lead, Regional Geographic Lead (6 counties), CDE California System of Support, providing TTA expertise to build COE capacity to effectively support LEAs, identifying and developing resources to improve student outcomes, and providing direct technical assistance to LEAs when requested since 2023. In addition, as Lead for Differentiated Assistance to Santa Clara County LEAs and charter schools identified through California's accountability system, providing intensive, individualized coaching and improvement planning including root cause analysis, measurable improvement goals, performance improvement plans, progress monitoring, and ongoing coaching. This work constitutes the state's core performance

management framework for LEAs and has been a continuous function of SCCOE for more than five years.

4. Lead, DataZone (est. 2012) (SCCOE's secure, low-cost data warehousing and analytics platform) integrated data technical assistance, supporting COEs and LEAs in Northern California in using high-quality, multi-source student data to drive coordinated services and data-informed decision-making. This work includes training educational agencies to use integrated data by leveraging DataZone data to monitor key performance indicators, assess system effectiveness, and support continuous improvement and coordinated interventions for students.
5. State Lead, CDE LEA Medi-Cal Billing Option Program, assisting and supporting LEAs statewide in securing federal reimbursement through the Medi-Cal Billing Option Program. Through this work SCCOE has collaborated with CDE and DHCS and provided technical assistance and professional development on billing compliance, claims infrastructure, and sustainable revenue strategies for school-based health services since 2021.
6. State Lead LEA for the California Collaborative for Learning Acceleration (California Collaborative for Educational Excellence), providing TTA to LEAs throughout the state to bring evidence-based accelerated learning strategies designed to meet pupils where they are in their learning (\$19M) since 2021.
7. State Lead, Commission on Teacher Credentialing's Statewide Residency Technical Assistance Center, delivering specialized TTA and comprehensive support to teacher and counselor residency programs across the state including performance management strategies for recruitment, retention, and coaching/mentoring for residents, (\$20M) for four years.
8. State Co-Lead, CDE Charter Authorizer Support Initiative (2024) as well as CDE Charter School Authorizer Technical Assistance Providers (2021), providing technical assistance, professional learning, and networking through statewide and regional activities to charter school authorizers.
9. State Co-Lead, Special Education Resource Lead: Building Capacity Co-Lead (2022) provides statewide technical assistance and performance management support through the California Collaborative for Impactful Pathways (CCIP). SCCOE helps LEAs strengthen the accuracy and consistency of the state's post-school outcomes data, which tracks whether students

with disabilities are enrolled in college, employed, or participating in training programs one year after exiting high school (Indicator 14). This work also includes building LEA capacity in transition planning and supporting districts identified for additional help through differentiated assistance. SCCOE's performance-management responsibilities center on helping LEAs set improvement goals, use consistent data-collection routines, analyze system gaps, and apply continuous-improvement strategies that align with the Statewide System of Support and statewide expectations for improving outcomes for students with disabilities.

Additionally, County Superintendent of Schools Dr. David Toston's prior leadership at the California Collaborative for Educational Excellence (CCEE) with the Community Engagement Initiative (CEI) scaled from \$13.2M to \$113M statewide. This initiative developed communities of practice, professional learning networks, and tools for aligning community engagement with performance goals. Dr. Toston brings this experience and methodology directly to this project.

Across these initiatives, SCCOE's TTA model emphasizes one-on-one coaching, performance plans, network improvement communities, communities of practice, and work sessions grounded in continuous improvement methodology: structures that translate directly to the behavioral health performance management technical assistance this project requires.

The following partnerships bring together specialized expertise in behavioral health performance management (BHPM), statewide technical assistance design, applied evaluation research, and population health science.

- **Stanford University School Of Medicine, Center for Population Health Sciences (PHS), and Stanford Graduate School Of Education** will jointly contribute research expertise in population health science, psychometrics, educational measurement, and predictive analytics as an unfunded research and analytics partner. Stanford PHS hosts the PHS Data Core, which manages high-sensitivity research datasets used by hundreds of researchers, and is the institutional home of the PRIME Registry, the largest primary care clinical data registry in the United States, containing electronic health record data on more than 8 million patients across all 50 states. Through the American Family Cohort (AFC) project, funded by a \$6.4 million award from the Advanced Research Projects Agency for Health (ARPA-H), Stanford is building an enriched dataset to study the health effects of educational policies. This partnership enables the project to develop

predictive analytics that link behavioral health competency data from the screening platform with population health data from the PRIME Registry, SIS-integrated school data (attendance, discipline, service receipt), and evaluation methodologies co-designed by Stanford's research team, testing a fundamentally new thesis that education outcomes can be predicted and informed by behavioral health screening data triangulated with primary care records. Key Stanford personnel include Benjamin Domingue, Ph.D. (Associate Professor, Stanford Graduate School of Education; Faculty Director, Policy Analysis for California Education), David Rehkopf, Sc.D., M.P.H. (Associate Professor, Department of Epidemiology and Population Health, Stanford School of Medicine; Principal Investigator, AFC Health), and Isabella Chu, M.P.H. (Associate Director, Data Core, Stanford Center for Population Health Sciences). This predictive analytic capability, grounded in one of the nation's largest clinical datasets and co-designed with Stanford's research team, will directly inform the statewide scalability recommendations in the Final Report and Training Guide, positioning this project's BHPM system as infrastructure that extends beyond school-level performance management into population-level health intelligence. A Letter of Intent from Stanford PHS is included as an attachment.

- **Deveau Burr Group (DBG)**, will provide statewide TTA design and implementation science and serve as a technical expert on the CYBHI Statewide Capacity Building and Technical Assistance grant, where DBG is responsible for supporting all 58 COEs in building operational capacity for school-based behavioral health services. DBG brings extensive experience designing TTA curricula for state-level education and behavioral health initiatives, leading large-scale stakeholder engagement processes across diverse LEA contexts, and developing the policy architecture that enables LEA systems improvement to take root and sustain. For this project, DBG leads the design and delivery of the TTA curriculum grounded in implementation science (NIRN Active Implementation Frameworks, Fixsen implementation stages, PDSA cycles), facilitates stakeholder engagement sessions with all six LEA teams, designs and facilitates the quarterly in-person and virtual learning collaboratives, provides ongoing individualized coaching to LEA teams on BHPM goal-setting, data interpretation, and continuous improvement, and authors the policy, practice, and sustainability chapters of the Training Guide and the implementation science and challenge synthesis sections of the Final Report. DBG's role ensures that the project's technical assistance is not generic professional development but a structured, evidence-based capacity building model

designed to produce sustainable local ownership of behavioral health performance management so that when the contract ends, LEAs have the internal expertise and institutional structures to sustain and continue the work independently.

- **IMPACTER Pathway**, will provide behavioral health screening and performance management expertise having developed the leading open-language behavioral health screening platform in California currently operational. It is actively used across San Diego COE, Ventura COE, and LEAs in San Mateo, El Dorado, Placer, Orange, and Imperial counties, supporting over 200,000 monthly users and processing more than 5 billion words of student voice data annually. The platform is integrated into school Student Information Systems (Aeries, PowerSchool, Infinite Campus, etc.) through Clever single sign-on and is grounded in two converging bodies of research. The first is Harvard's Making Caring Common project, led by Dr. Richard Weissbourd, which identified the core behavioral health competencies (including empathy, ethical reasoning, conflict resolution, and help-seeking) that predict whether young people thrive or struggle across social, emotional, and academic domains. The platform's six validated behavioral health domains (Self-Insight, Emotional Resilience, Conflict Resolution, Effective Help-Seeking, Relational Awareness, and Reflective Growth) were derived from this competency framework and co-developed with the San Diego County Office of Education through iterative field testing with school partners. The second is the body of research on emotional granularity and precision of language, advanced by Dr. Marc Brackett at the Yale Center for Emotional Intelligence, demonstrating that the more precisely a person can articulate their emotional experience, the more effectively they can regulate their behavior and access appropriate support. This is the scientific basis for why the platform uses open-ended spoken-language prompts rather than Likert-scale response options: when students describe their own experiences with behavioral health competencies in their own words, in any language, the specificity and nuance of their language reveals their actual functioning in ways that selecting a number on a scale cannot. The platform's machine learning scoring pipeline analyzes each student's spoken response against validated rubrics, producing a rubric-aligned score, an MTSS tier assignment, and the student's actual words, all tied to the student's profile in the school's SIS roster. This means counselors and administrators see not just a score but what the student said and what level of support is indicated, making the data immediately actionable in SST meetings, MTSS referrals, and student services planning. The platform is

flexible and configurable per LEA: each district's existing behavioral health framework can be crosswalked onto the platform's validated competency architecture, and the platform can ingest additional data sources from a school's SIS - including attendance, discipline, and service receipt - to contribute to a more comprehensive, predictive MTSS tiering analytic. Because this infrastructure is already built, validated, California-NDPA compliant, FERPA-aligned, and operational in California schools, this project's resources are able to be directed instead toward the deeper work of LEA capacity building, data literacy, sustainability planning, and embedding behavioral health performance management into board policies and administrative regulations rather than tool development. The platform carries no net cost to participating schools: each administration is reimbursable under California's CYBHI Fee Schedule (CPT Code 96127, U4 modifier), meaning LEAs can sustain it through existing Medi-Cal billing infrastructure without additional general fund impact. IMPACTER is not a tool to be built; it is operational infrastructure that California schools are already using and that the state is already reimbursing through CYBHI.

- **Breaking Barriers California**, housed at McGeorge School of Law, University of the Pacific, will serve as the project's strategic advisor on policy, compliance, and cross-system integration. Elizabeth Estes, JD, is a Clinical Professor of Public Policy and also serves as counsel at Atkinson, Andelson, Loya, Ruud & Romo, where she has represented school districts and county offices of education for over 25 years on special education, student services, and behavioral health matters. Breaking Barriers is a statewide collaborative of leaders from across child-serving systems dedicated to advancing integrated behavioral health supports for California's children and youth, and has published widely on Medi-Cal financing for school behavioral health, HIPAA/FERPA navigation for integrated care, and cross-agency systems alignment, the precise policy and compliance architecture this project requires. For this project, Ms. Estes provides direct technical assistance to participating LEAs through the quarterly learning collaboratives on navigating the legal, policy, and cross-system dimensions of school-based behavioral health performance management, and contributes policy and compliance analysis to both the Training Guide and the Final Report.
- **Applied Survey Research (ASR)**, a nonprofit social research firm with over 40 years of experience conducting applied research for public agencies, school districts, and nonprofits across California, will serve as the project evaluator. ASR has conducted six county-level longitudinal studies using de-

identified student data in California counties including but not limited to Santa Clara, Alameda, San Francisco, and Marin. Lisa Colvig-Niclai, MA, Senior Vice President of Planning and Evaluation, leads ASR's work on this project, which will include co-leadership of the literature review for the Indicators, Outcomes, and Metrics Brief, development of the multilevel longitudinal evaluation framework, qualitative data collection (structured interviews across all 18 participating schools), the evaluation chapter for the Training Guide, and the evaluation and methodology sections of the Final Report.

- a. Include examples of technical assistance activities, performance management strategies that demonstrate your ability to train, teach, and support LEAs and schools in performance management.

Example 1: CYBHI Statewide Grant Administration. As co-lead with Sacramento COE, SCCOE provides statewide support to all 58 COEs to build operational readiness for the CYBHI behavioral health fee schedule through technical assistance and performance-management. Activities include weekly office hours for real-time implementation support; one-on-one coaching with COE leadership on implementation planning and performance benchmarking; development of funding guidance documentation and communication toolkits for LEA and community stakeholder engagement; communities of practice for key implementation topics (provider credentialing, claims submission, data privacy); and small group learning sessions organized by cohort and readiness level. Each COE develops a locally customized implementation plan with SCCOE providing technical review, progress monitoring, and ongoing coaching - an approach directly related to the BHPM approach proposed in this project.

Example 2: Regional Geographic Lead - Continuous Improvement for Local LEAs. Through California's Statewide System of Support, SCCOE helps county offices of education build the skills and systems needed to guide their districts in improving student outcomes, including delivering Differentiated Assistance to LEAs identified on the California School Dashboard. Support includes collaborative root cause analysis with LEA leadership, development of improvement plans targeting specific student groups aligned with state priorities - all core elements of performance management. Technical assistance includes coaching LEA teams on monitoring progress, reviewing data, adjusting strategies, and assessing milestones attainment. As part of this work, SCCOE partnered with CCEE to provide targeted, high-level support on chronic absenteeism, offering high-level coaching and data-inquiry assistance to help LEAs analyze attendance patterns and plan tiered

interventions. For LEAs with persistent challenges, SCCOE facilitates network improvement communities and communities of practices where LEA leaders work collectively on shared problems of practice using structured improvement protocols. The performance management discipline embedded in the Regional Geographic Lead work (identify needs, set targets, implement interventions, measure progress, adjust) is structurally identical to what this project will apply to school behavioral health.

Example 3: CCSPP Regional Technical Assistance Center. As a Regional Technical Assistance Center for the California Community Schools Partnership Program (CCSPP), SCCOE provides direct technical assistance to COEs and LEAs across the Bay Area on community schools implementation. This includes supporting LEAs in conducting comprehensive needs assessments, developing community schools implementation plans with measurable goals, building stakeholder engagement structures that connect community partners to school improvement priorities, and aligning community schools programming with LCAP performance targets. SCCOE facilitates regional convenings where LEA teams share implementation progress, identify common challenges, and co-develop solutions - the same community of practice model that will be applied to the BHPM learning collaboratives in this project.

Example 4: DataZone Integrated Data Technical Assistance (SCCOE). Through DataZone, SCCOE supports COEs and LEAs through its centralized data warehouse by consolidating multiple educational datasets within a multi-district data model. Technical assistance includes training teams to interpret dashboards that visualize academic, behavioral, and programmatic trends. Performance management support focuses on helping teams identify system gaps and connect patterns across student-level data sources to inform local planning and decision-making, expertise that directly parallels the monitoring and data-use expectations of this BHPM project.

Example 5: Special Education Resource Lead – California Collaborative for Impactful Pathways (SCCOE). Within SERL, SCCOE integrates technical assistance with performance-management supports to build LEA capacity in post-school outcomes reporting, transition planning, and equitable practices for students with disabilities. Statewide trainings and resources strengthen high-quality data collection and culturally responsive communication, while Performance management elements include teaching teams to run structured data-review routines, interpret indicator and outcome trends, and refine strategies via short-cycle testing with differentiated assistance. Improvement communities reinforce cyclical performance management practices so LEAs can adopt, adjust,

and sustain effective approaches, mirroring the continuous-improvement expectations of this BHPM project.

Example 6: Behavioral Health Performance Management Through Direct LEA and School Partnership (IMPACTER).

Impacter Pathway has partnered directly with LEAs and COEs across seven California counties (San Diego, Ventura, San Mateo, El Dorado, Placer, Orange, Imperial) to deploy its behavioral health screening and performance management platform, currently supporting over 200,000 monthly users. Each partnership follows a structured implementation sequence that mirrors the performance management cycle at the core of this project: technology readiness assessment of each school's existing SIS and data infrastructure; crosswalk consultation where IMPACTER works with LEA behavioral health leads to map their existing framework onto the platform's six-domain competency architecture; SIS integration (Aeries, PowerSchool, Infinite Campus) for automated rostering and demographic synchronization; site-level training for counselors and administrators on screener administration, dashboard interpretation, and MTSS-aligned data use; baseline screening followed by goal-setting workshops where school teams translate their first round of data into specific, measurable growth targets; and ongoing data walkthrough facilitation after each subsequent screening window to review progress, identify students needing intensified support, and adjust school-wide strategies. This direct partnership model - assess readiness, configure to local context, train, set goals from baseline data, monitor, adjust - builds the same performance management disciplines at the school level that SCCOE builds at the LEA level through Differentiated Assistance and CYBHI, and the two approaches will operate as complementary layers in this project.

Example 7: CYBHI Statewide Capacity Building and Technical Assistance (DBG).

Deveau Burr Group serves as a technical expert on the CYBHI Statewide Capacity Building and Technical Assistance grant, where DBG is responsible for supporting all 58 COEs in building operational capacity for school-based behavioral health services. DBG's TTA activities include designing and delivering structured TTA curricula grounded in implementation science for COE and LEA teams at varying stages of readiness; facilitating statewide and regional stakeholder engagement sessions bringing together LEA leadership, county behavioral health departments, and community partners to align on implementation priorities; developing the policy architecture and sustainability frameworks that COEs use to guide LEA-level implementation planning; and leading cohort-based learning sessions where COE teams share implementation progress, troubleshoot common barriers, and co-develop solutions. DBG's approach emphasizes building durable institutional capacity rather than delivering one-time training events, the same philosophy that drives the TTA model for this project, where DBG will design the implementation

science-grounded curriculum, facilitate the quarterly learning collaboratives, and provide ongoing individualized coaching to ensure LEA teams can sustain BHPM independently after the contract period.

Together, these examples demonstrate SCCOE and its partners' ability to deliver precise technical assistance and, where appropriate, explicit performance-management routines that build adoption, capacity, and measurable impact, directly aligning with the BHPM system requirements.

b. Explain the outcomes of these efforts and how you measured and defined success.

Success in performance management and/or technical assistance is defined across three dimensions: adoption (are LEAs and schools using the systems and strategies consistently), capacity (are LEAs building internal infrastructure to sustain the work beyond TTA support), and impact (are measurable improvements in student or system outcomes evident).

1. Success Measures for CYBHI Statewide Grant Administration. For CYBHI, success is defined by a concrete, measurable outcome: LEAs successfully billing the CYBHI fee schedule and being reimbursed for school-based behavioral health services (*Adoption*). Reaching this milestone requires LEAs to meet performance benchmarks across Medi-Cal enrollment, NPI registration, provider credentialing, HIPAA/FERPA compliance, and claims submission capability. SCCOE's TTA has supported LEAs across all three CYBHI cohorts in achieving operational readiness within DHCS timelines with each LEA's progress tracked against individualized implementation plans with specific milestones and target dates (*Capacity*). The project's behavioral health screening platform directly advances this same CYBHI readiness goal: by providing a CYBHI-reimbursable screener (CPT Code 96127, U4 modifier, \$4.81 per administration) that generates the clinical documentation required for Medi-Cal claims, participating LEAs simultaneously build BHPM capacity and activate a sustainable revenue stream at zero net cost to district general funds (*Impact*).

2. Success Measures for Regional Geographic Lead. Success is reflected in LEAs' adoption of structured data-inquiry routines, milestone monitoring processes, and short-cycle adjustments as part of their continuous-improvement systems (*Adoption*). Capacity increased as districts strengthened internal teams capable of analyzing Dashboard indicators, interpreting student-group disparities, and (through SCCOE's high-level collaboration with CCEE) using chronic-absenteeism data to design and implement tiered supports (*Capacity*). Impact was

demonstrated when LEAs met the improvement targets identified in their DA plans and, in many cases, exited Differentiated Assistance after showing measurable progress in the specific areas that triggered their identification (*Impact*).

3. Success Measures for CCSPP Regional Technical Assistance Center. Success is demonstrated when LEAs consistently utilize the tools, resources, and implementation supports provided through regional CCSPP convenings and technical assistance (*Adoption*). Capacity increases as districts establish stronger stakeholder-engagement structures, refine processes, and align community-school programming with measurable LCAP performance targets (*Capacity*). Impact is shown through LEA progress on community-school implementation plans, including advancement through stages of readiness and improved coherence across whole-child supports that strengthen conditions for student learning (*Impact*).

4. Success Measures for DataZone Integrated Data Technical Assistance. Success is demonstrated by LEA teams regularly using DataZone dashboards and integrated-data tools to support planning, monitoring, and decision-making at the site and district levels (*Adoption*). Capacity is reflected in LEA staff strengthening their integrated-data inquiry skills including the ability to identify system gaps, analyze patterns across datasets, and apply evidence to local planning cycles (*Capacity*). Impact is shown when districts use DataZone insights to refine interventions, target supports, and adjust instructional or programmatic strategies tied to academic outcomes such as identifying achievement gaps and improving interim assessment trends where tracked (*Impact*).

5. Success Measures for CCIP Special Education Resource Lead. Success is demonstrated through LEAs adopting improved post-school outcomes data collection routines, transition-planning practices, and culturally responsive communication materials developed through SERL technical assistance (*Adoption*). Capacity grows as districts strengthen systems for tracking outcomes, expand staff competency in evidence-based special-education practices, and implement structured data-review routines for continuous improvement (*Capacity*). Impact is demonstrated by more complete and accurate post-school outcomes data, higher rates of student-led IEPs and supported decision-making, and measurable gains in indicators such as graduation, least restrictive environment placement, and postsecondary enrollment or employment (*Impact*).

6. Success Measures for Behavioral Health Performance Management Through Direct LEA and School Partnership (IMPACTER). Across its seven California county partnerships, IMPACTER measures success through three dimensions. Adoption

success is measured at the implementation site level: 80% or higher screener completion rates among targeted student groups within each participating school's designated administration window, active dashboard access by designated counselors and administrators between screening windows (measured through platform usage analytics), and integration of screener results into existing MTSS workflows such as SST meetings, referral decisions, and data walkthroughs. Because the platform produces results on a live dashboard within minutes of each student's administration — disaggregated to the individual student, classroom, school, and LEA level — adoption is measurable in real time through platform analytics, not self-reported surveys. Capacity success is demonstrated when school teams move from relying on IMPACTER-facilitated data walkthroughs to leading their own. In mature implementations, counselors independently pull subgroup reports, administrators present domain-level trend data at staff meetings, and school teams use quarterly screening data to adjust their own MTSS tier criteria and service referral thresholds without external coaching. The crosswalk methodology — where each LEA's existing behavioral health framework is mapped onto the platform's validated competency architecture — builds this capacity by design: school teams are working within their own framework, using a measurement tool they understand, rather than adopting an external system they will abandon when support ends. Impact success is demonstrated through measurable changes in student behavioral health outcomes: positive MTSS tier movement (students progressing from Tier 3 to Tier 2, or Tier 2 to Tier 1), domain-level score improvements across screening windows, and — because the platform integrates with each school's SIS — correlation analysis linking behavioral health competency gains with changes in attendance, discipline incidents, and service receipt patterns. Unlike instruments that produce anonymized, aggregate-only results on an annual cycle, the platform's student-level, real-time data enables schools to track whether specific interventions are producing measurable improvements for specific students — the granularity required for genuine performance management rather than retrospective reporting.

7. Success Measures for CYBHI Statewide Capacity Building and Technical Assistance (DBG). Success in our CYBHI charter technical assistance is measured through Adoption, Capacity building and Impact. First, when charter schools adopt and actively utilize the technical assistance structures, tools, and implementation guidance provided through our team at the CYBHI statewide capacity-building effort. This includes charter schools selecting and implementing an electronic health record (EHR) system, identifying or hiring appropriately credentialed staff, and establishing operational processes to deliver school-based behavioral health services. Capacity grows as charter schools strengthen internal systems to

coordinate across school leadership, student services teams, county behavioral health partners, and community-based organizations while navigating data-sharing requirements, including HIPAA, FERPA, and specific compliance frameworks. Impact is demonstrated when charter schools successfully operationalize the CYBHI infrastructure by screening and documenting behavioral health services, coordinating with community partners to expand student supports, and ultimately billing and receiving reimbursement through the CYBHI fee schedule, creating sustainable funding streams that enable the long-term delivery of school-based behavioral health services.

C.2. Experience Shifting Educator Mindsets

C.2. Describe your experience shifting school educator mindsets around performance management in schools.

SCCOE's experience in shifting educator mindset is grounded in a consistent finding across initiatives: educators adopt performance management when they see their own priorities reflected in the framework, not when they are told to comply with an external mandate. Across CYBHI, CCSPP, Regional Geographic Lead, and other initiatives the most powerful catalyst for engagement is centering the focus on student performance and student success - not compliance, not reporting, not data for data's sake - but a shared commitment to understanding how students are actually doing and what adults in the system can do differently to improve outcomes. When performance management is demonstrated as a successful vehicle for impacting students, the resistance drops and the work accelerates.

As a Regional Geographic Lead, SCCOE coaches never lead with the state's accountability requirements. Instead, they begin by asking LEA leaders to articulate their own improvement goals and challenges, then demonstrate how the performance management cycle (data collection, analysis, goal-setting, progress monitoring) can directly serve those goals. The crosswalk between what an LEA already wants to accomplish and what the system of support offers is consistently the turning point for engagement. SCCOE helps district leaders move from viewing performance management as an external expectation to recognizing it as a structure that provides coherence. As educators begin to use these routines to understand student-group performance and make informed adjustments, performance management becomes a source of direction rather than burden, and teams experience increased confidence in their ability to monitor and improve outcomes over time.

Similarly, SCCOE's Youth Health & Wellness Department has seen parallel shifts through CYBHI. The statewide fee-schedule readiness process requires COEs and LEAs to break a complex initiative into sequenced milestones (such as Medi-Cal enrollment, provider credentialing, implementation-plan development, baseline surveys, and regular progress reporting) supported by SCCOE's guides, templates, dashboards, and Communities of Practice. As educators and operational staff engage with these tools, they experience performance management not as an additional burden, but as a way to bring clarity and order to work that initially felt overwhelming. The structured progress-review routines, readiness indicators, and step-by-step planning templates help teams see what to do first, how to measure

progress, and how each milestone contributes to the larger goal of sustainable behavioral-health service delivery. Over time, staff begin to view performance management as a practical framework that makes CYBHI implementation achievable, predictable, and aligned to their shared commitment to expanding student access to behavioral-health supports.

In the CEI, under Dr. Toston's leadership at CCEE, the team framed community engagement as a moral imperative, connecting performance management to the outcomes LEAs already cared about rather than presenting it as a procedural requirement. Facilitators helped LEA teams see exemplars and model practices from peer districts, then supported them in mapping those models onto their own context. The combination of moral framing, peer evidence, and local customization proved more effective at generating commitment than any amount of external presentation.

This project's technology platform adds a powerful additional lever for mindset shift that is unique: authentic student voice data. IMPACTER Pathway has built and demonstrated measurable success with a behavioral health screening platform that is already operational in schools across seven California counties, supporting over 200,000 monthly users. The platform captures students' own spoken reflections on their behavioral health functioning - in their own words, in any language - scores those reflections against validated rubrics using an automated machine learning pipeline, and presents the scored results alongside the student's actual words. When an educator hears a student describe their struggle with emotional resilience or conflict resolution - and sees how the system scored that response, and what support tier it triggered - the data becomes personally meaningful in a way that numerical survey scores never achieve. Across multiple county and district partnerships where the platform is already in active use, this "aha moment" has been the most consistent driver of educator buy-in. The performance management layer then brings that data to life for the LEAs the project supports, helping educators make it real in the classroom, understand how their students are actually performing across behavioral health domains, and make concrete changes in programming, referral pathways, and student services that result in measurable improvements in student outcomes. This is the critical bridge between having data and using data, and it is where the combination of SCCOE's performance management expertise and IMPACTER's operational platform will create a positive impact on student outcomes.

a. Include examples of challenges faced in creating buy-in with school administration, staff, or educators. What were the specific challenges you faced?

How did you overcome these challenges? What was the catalyst that led to a shift in mindset?

Challenge 1: "Performance management is compliance, not improvement." This perception is a persistent barrier. As a Regional Geographic Lead, in Differentiated Assistance, some LEA leaders initially approached the process defensively, viewing it as punitive rather than supportive. The SCCOE overcame this by restructuring the entry conversation: rather than arriving with Dashboard data and telling the LEA what needed to change, coaches asked LEA leaders to present their own analysis of their challenges and invited them to identify where they wanted help. This shifted the dynamic from external evaluation to collaborative problem-solving. The catalyst was when LEA leaders began bringing their own questions and data to coaching sessions rather than waiting for the SCCOE to set the agenda, signaling that they had internalized the performance management cycle as their own tool. At the heart of every successful engagement, the turning point came when staff reconnected with children and student performance as the driving purpose, not compliance with an external framework, but a genuine commitment to understanding how their students were doing and what they could do to improve outcomes.

Challenge 2: "Another survey tool, we're already drowning in data collection." When introducing the project's behavioral health screening platform, already built, validated, and demonstrating success across seven California counties, the most common initial objection from school counselors is fatigue with Likert-scale instruments that consume class time and produce results no one acts on. The platform overcomes this in three ways that fundamentally change the conversation. First, administration takes 5–10 minutes per student through a brief open-ended spoken-language prompt, students respond in their own words, in any language, with no training required. Second, the output is specific and immediately actionable: not "this student scored 3.2 on wellness" but "this student's Conflict Resolution response scored at Foundational level, here is what they said in their own words, and Tier 3 support is indicated." Third, because the platform is integrated into the school's Student Information System through Clever single sign-on with role-based permissions, the data lives where counselors and administrators already work, not in a separate spreadsheet or external portal. The shift in educator mindset accelerates when early-adopter counselors share results in staff meetings and SST sessions, demonstrating that the data validates and strengthens their professional judgment rather than replacing it. Unlike anonymized or aggregated instruments such as the California Healthy Kids Survey,

this data is tied to individual students, synced to school rosters, and available immediately, making it the basis for action, not just reporting.

Challenge 3: Competing demands on LEA leader attention. This challenge consistently emerged across CYBHI implementation, where school and county leaders expressed strong conceptual support but struggled to translate that support into sustained engagement with performance-management routines. Even when leaders are supportive in principle, they struggle to allocate time amid competing priorities. In the CYBHI work, SCCOE found that several COEs initially signed on to participate but failed to assign dedicated staff or attend scheduled TTA sessions, not because they disagreed with the work, but because competing demands consumed the bandwidth they had committed. This lack of early engagement functioned as a barrier to buy-in, because leaders perceived CYBHI readiness milestones as yet another set of expectations competing with urgent operational pressures. SCCOE overcame this by restructuring engagement around cohort-based communities of practice where LEA leaders heard directly from peers who had already implemented having met specific, concrete outcomes. Hearing peers describe how they used CYBHI implementation-plan templates, milestone sequences, and progress-report structures made the abstract work tangible and demonstrated that performance management was a practical roadmap rather than an additional burden. Peer evidence proved consistently more powerful than external persuasion: when a superintendent heard another superintendent describe how CYBHI billing had generated revenue that funded a new counselor position, the conversation shifted from "we don't have time" to "we can't afford not to." This point in the engagement represents the clear catalyst for mindset shift: leaders recognized that performance-management structures reduced ambiguity, clarified sequencing, and ultimately freed capacity by preventing wasted effort. SCCOE also learned that structural support matters as much as motivation, dedicated funding for staff time is what converts interest into action. Once leaders internalized that structured milestones translated directly into achievable progress, CYBHI readiness moved from a competing priority to a guided process they felt confident executing. This project applies that lesson directly: the \$120,000 per-LEA participation incentive ensures that participating districts can dedicate staff to training, data review, and collaborative learning without competing against existing budget priorities.

C.3. Staffing, Operational Capacity, Systems, and Partnerships

C.3. Describe your organization's staffing, operational capacity, systems, and partnerships that demonstrate your ability to:

- a. Partner with six (6) LEAs and three (3) schools within each LEA for this project.

Staffing. SCCOE serves 31 school districts and has direct, established relationships with LEA leadership across the county. SCCOE leadership including County Superintendent of Schools Dr. David M. Toston, Sr. has led recruitment for multiple regional and statewide initiatives including CYBHI, CEI, and Regional Geographic Lead, and has an existing network of COE and LEA superintendents across the Bay Area region and state. SCCOE's staffing model includes dedicated project staff and cross-departmental teams who regularly manage multi-district initiatives, allowing the organization to coordinate simultaneously across numerous LEAs and school sites, including this project.

Operational Capacity. The recruitment strategy for this project prioritizes LEAs meeting multiple readiness criteria: current engagement in BHSSA-funded behavioral health work, existing MTSS infrastructure, eligibility for the equity multiplier, and participation in or readiness for the CYBHI fee schedule. SCCOE has established operational processes for launching and managing large-scale initiatives, including coordinated onboarding, milestone tracking, and structured protocols that allow for consistent engagement across multiple LEAs. This infrastructure enables SCCOE to meet tight timelines, such as the RFP's 90-day recruitment requirement, while maintaining consistent quality and responsiveness across participating districts.

Systems. Per RFP requirements, all three schools selected within each LEA must be recipients of BHSSA funding. By recruiting LEAs with overlapping initiative eligibilities, the project is positioned to demonstrate the cross-initiative coherence and fiscal efficiency that the state has identified as a legislative priority, an added value that goes beyond the RFP's requirements and strengthens the case for statewide scalability after the project period ends. These established systems support efficient identification of eligible LEAs and streamline coordination across overlapping initiatives, ensuring that participating districts and schools enter the project with aligned priorities and compatible readiness structures.

Partnerships. SCCOE will also recruit LEAs that have identified behavioral health or student engagement as an area of need through geographic lead, differentiated assistance, or other monitoring systems work, ensuring that participating districts have both the motivation and the infrastructure foundation to engage meaningfully. By working with LEAs that have established relationships with SCCOE in other statewide initiatives, the project benefits from a trusted foundation that supports sustained engagement throughout the implementation period.

- b. Support LEAs and educators in the development of a performance management system for supporting school behavioral health quality improvement, including the measurement of student outcomes in collaboration with the selected school district and schools.

Staffing. The SCCOE's Youth Health & Wellness Department includes program administrators, project leads, and school-based behavioral health specialists who support LEAs in implementing school-linked behavioral health initiatives, equipping them to guide districts through the development and use of a performance-management system anchored in the BHPM platform. These staff routinely work with district wellness teams, mental-health providers, school administrators, and SEL/MTSS leads, giving them the direct practitioner relationships and operational familiarity needed to help LEAs integrate BHPM practices into existing school-based behavioral health structures.

Operational Capacity. SCCOE's Youth Health & Wellness Department has established operational processes for helping LEAs adopt new behavioral-health systems, including structured onboarding workflows, implementation-plan reviews, and coordinated communication routines that ensure districts can incorporate the BHPM platform into their existing school-health and MTSS structures. Rather than developing new performance-management tools, SCCOE's operational capacity focuses on helping LEAs embed the BHPM platform into their regular improvement routines, such as reviewing student-level behavioral-health indicators, identifying priority subgroups, and setting short-cycle goals that align with each district's MTSS and school-health priorities.

Systems. The project's behavioral health screening and performance management platform is operational infrastructure not a proposed solution requiring development time, procurement, or piloting. It is currently deployed across seven California counties, integrated with major SIS platforms used by LEAs (Aeries, PowerSchool, Infinite Campus, Synergy, Schoolwise), California-NDPA compliant, FERPA-aligned, and reimbursable under the CYBHI Fee Schedule. The platform

produces school-level, LEA-level, and county-level dashboards that can be configured to serve as the BHPM system or to contribute data to a broader BHPM framework, depending on each LEA's existing infrastructure and preferences. Each LEA's behavioral health framework can be crosswalked onto the platform's competency architecture, and the platform can ingest additional data sources from a school's SIS (attendance, discipline, service receipt) to contribute to a more comprehensive, predictive MTSS tiering analytic. This operational readiness means the project does not require a tool development phase, the system is ready to configure and deploy from day one, allowing the team to direct resources toward the capacity building, data literacy, board policies, administrative regulations, and sustainability planning that this RFP prioritizes. These system capabilities allow SCCOE to help LEAs translate platform outputs into practical performance-management routines, such as identifying priority student groups, setting quarterly improvement targets, and monitoring changes in behavioral-health outcomes tied to specific interventions.

Partnerships. The project leverages SCCOE's existing relationships with all 31 Santa Clara County school districts, its statewide networks through CYBHI (all 58 COEs), CCSPP (Bay Area LEAs), Geographic Lead (locally identified LEAs), and CCIP Special Education Resource Lead (statewide LEAs). Stanford University's Center for Population Health Sciences contributes predictive analytics methodology linking behavioral health screening data with population health records from the PRIME Registry, enabling a measurement capability no other team can offer. Breaking Barriers California provides the legal and policy expertise that LEAs consistently identify as their most complex barrier of navigating HIPAA/FERPA, Medi-Cal billing, and cross-agency data sharing. ASR provides independent evaluation capacity. Together, these partners provide the multidisciplinary expertise (behavioral health, analytics, legal compliance, evaluation, and school operations) required to help construct complete performance management that is both compliant and usable by school staff on a daily basis. These partnerships are not proposed; they are established, with signed Letters of Intent from each partner included in this proposal.

Measurement of Student Outcomes. The platform automatically produces rubric-aligned scores across six behavioral health domains and MTSS tier assignments for every student at each screening window. Because the platform integrates with each school's SIS, outcome data can be linked to attendance, discipline, service receipt, and demographic records enabling the project to track whether behavioral health competency improvements correlate with changes in school-level outcomes. Stanford's research team contributes predictive analytics methodology,

and ASR provides the independent longitudinal evaluation framework including multilevel statistical modeling and qualitative data collection across all 18 schools.

c. Support school administration, staff and educators in the development of school-wide growth goals for student outcomes.

Staffing. Support for administrators, staff, and educators will be provided through the establishment of baseline profiles, goal setting with school teams, and utilizing improvement science to improve practices and student outcomes. SCCOE staff will facilitate goal-setting workshops, guide school teams through interpreting baseline data, and coordinate across LEAs to ensure that each school's process aligns with its existing planning structures while preserving local autonomy. SCCOE staff are trained to guide principals, counselors, wellness staff, and instructional teams in interpreting aggregated behavioral-health data and translating it into clear, school-wide priorities. This staffing structure ensures that every school team receives hands-on support in developing goals that are realistic, data-informed, and aligned with school-site improvement priorities.

Operational Capacity. After the initial screening, the technology platform will provide a baseline profile for each school showing the distribution of students across MTSS tiers and aggregate performance across each behavioral health domain. The project team will facilitate goal-setting workshops helping school teams translate baseline data into actionable targets aligned with their existing school plans and LCAP priorities. The SCCOE will coordinate across LEAs to ensure goal-setting processes are consistent while allowing for local customization. Importantly, the process is designed so that school teams are co-creating goals from their own data, not receiving externally imposed targets which reinforces the ownership and buy-in that sustains performance management over time. This process ensures consistency across the six participating LEAs while allowing each school to customize goals to reflect its own student-level patterns and improvement priorities.

Systems. Subsequent screenings will automatically track progress, and quarterly outcomes reports will highlight movement at school and LEA level. These system-generated reports allow educators to see clearly whether growth goals are being met and where adjustments may be needed. The platform's ability to generate comparative data across domains and tiers supports the continuous monitoring essential to building school-wide growth goals. Quarterly progress visualizations give school teams a clear picture of movement over time, supporting

collaborative review of whether growth goals are being met and whether mid-course adjustments are needed. These system-generated insights anchor school-wide conversations about progress, helping educators identify which strategies are contributing to improvement and which require refinement.

Partnerships. The project team will facilitate workshops with school teams to use this data for continuous quality improvement, reviewing progress, sharing challenges, and adjusting strategies based on what the data reveals. SCCOE's long-standing relationships with school leaders across the county, region, and state enable a collaborative approach where growth goals are co-created rather than externally imposed, strengthening engagement and ownership.

d. Create buy-in with school administration, staff, and educators for student behavioral health performance management in schools.

Staffing. SCCOE's Youth Health & Wellness Department provides the staffing foundation needed to build buy-in across school administration, staff, and educators. The team includes program administrators and specialists who regularly support districts in adopting school-based behavioral-health initiatives and are experienced in facilitating improvement-science, informed engagement sessions. These staff members guide principals, wellness teams, counselors, and instructional leaders through orientation sessions that introduce the behavioral-health performance management (BHPM) framework, using examples from peer districts to make the work relatable and accessible. Their direct experience working with schools on behavioral-health initiatives positions them to cultivate trust and early commitment among school-site teams.

Operational Capacity. SCCOE leverages long-standing relationships with LEA leadership to establish early buy-in at the district level by framing participation as a strategy for building sustainable behavioral-health infrastructure. This includes clearly communicating the fiscal and operational benefits enabled by the BHPM system, such as the \$120,000 LEA participation incentive and the platform's reimbursability under the CYBHI fee schedule. These operational factors help district leaders prioritize involvement without competing against core academic responsibilities. At the school-leadership level, SCCOE facilitates improvement science informed introduction sessions that help administrators connect their existing priorities (such as MTSS, wellness initiatives, and LCAP goals) to the BHPM framework, reinforcing that the system complements current work rather than adding new burdens.

Systems. Educator-level buy-in is supported through system features that remove the most common barriers to adoption. The technology platform uses authentic student-voice data collected through a brief five (5) to ten (10) minute spoken reflection, which educators consistently find more compelling and actionable than traditional numerical surveys. The minimal instructional time required, the absence of student training needs, and the flexibility in administration reduce the logistical burden that often hinders participation. These system attributes directly address educator resistance by making the BHPM process both meaningful and manageable, increasing the likelihood that school staff will engage consistently with the data.

Partnerships. SCCOE reinforces buy-in through a community-of-practice model that brings participating LEAs together quarterly for collaborative learning and shared problem-solving. These convenings allow district and school teams to collectively interpret data, identify cross-site patterns, and co-develop solutions to implementation challenges, building a shared sense of ownership and professional connection. This model draws on SCCOE's demonstrated experience facilitating similar networks through CYBHI (statewide cohort learning for all 58 COEs), CCSPP (regional community-schools convenings), Geographic Lead (networked improvement communities), CEI (statewide learning networks), CCIP Special Education Resource Lead (statewide collaboration and coaching structures). Breaking Barriers California enhances this collaborative structure by providing policy, legal, and cross-system advisory support in areas LEAs routinely identify as the most complex, further strengthening school and educator confidence in adopting BHPM practices.

Together, these staffing structures, operational processes, system features, and collaborative partnerships demonstrate SCCOE's capacity to create and sustain buy-in among LEA administrators, school-site leadership teams, and classroom educators for school-based behavioral health performance management.

C.4. Staff Experience Designing and Implementing Systems

- C.4. a. Describe your staff's experience designing, developing, and implementing processes, systems, and tools to improve school and student outcomes (if using subcontractors please include a letter of intent from each sub-contractor).

Santa Clara County Office of Education. SCCOE maintains a staff of over 1,180 and operates comprehensive infrastructure for technical assistance, grant administration, and systems-level LEA support. SCCOE has designed and implemented statewide systems including the CYBHI grant administration framework (serving all 58 counties), the California Community Schools Partnership Program Regional Technical Assistance Center (CCSPP RTAC) for the Bay Area, the Statewide Residency Technical Assistance Center (\$20M grant from the California Commission on Teacher Credentialing), the statewide CCEE CCLA Learning Acceleration System grant(\$19M), the California Collaborative for Impactful Pathways (CCIP) Special Education Resource Leads (SERL), and the Geographic Lead/ Differentiated Assistance framework supporting LEAs identified through California's accountability system.

The following SCCOE staff will support this project:

Dr. David Toston, Sr, County Superintendent of Schools leads the SCCOE and will support the project with his expertise on designing and developing processes to scale up initiatives and through leveraging his network of COE and LEA Superintendents.

Dr. Deborah Gorgulho, Assistant Superintendent of the Instruction, Leadership and Innovation Division leads and provides oversight of SCCOE's Continuous Improvement and Accountability, Educator Preparation, Learning and Instruction, Innovations Collaboration, and Youth Health and Wellness departments and programs. She has led the design and implementation of countywide and statewide systems including continuous-improvement processes, monitoring structures, and instructional support frameworks that improve student outcomes through coherent structures and aligned data-use routines. As **Project Director**, she will provide executive oversight for all activities, manage the Commission for Behavioral Health (Commission) relationships, ensure alignment with BHSSA goals, and chair the project partnership meetings.

Stephanie Gomez, Assistant Superintendent and Chief Business Official oversees fiscal administration for SCCOE ensuring compliance with federal and state

requirements across all initiatives. As CBO, she will provide executive fiscal oversight for the \$9M contract, including subcontractor payment processing, budget monitoring, audit preparation, and compliance with state and fiscal requirements.

Dr. Pilar Vazquez-Vialva, Director IV of Youth Health & Wellness has designed and implemented behavioral-health workflows, referral pathways, and cross-department coordination processes that strengthen school-site wellness systems and improve access to student supports. She leads SCCOE's behavioral health programming and serves as the **Program Coordinator** for this project, providing direct day to day operational oversight of the project's implementation, LEA engagement, and Commission deliverables.

Dr. Jessica Simpson, Director IV of Executive Services leads SCCOE's Executive Services Department overseeing policies and regulations, and supports the SCCOE and LEAs with understanding Education Code requirements. She will support the development and implementation of project related processes and policies.

Marie Busque (LCSW, PPSC), Clinical Supervisor oversees clinical supervision for SCCOE's educator preparation and wellness programs. She has developed behavioral-health tools and processes including clinical workflows, screening protocols, and domain-mapping structures that help schools translate student-level data into targeted interventions that improve outcomes. As the **Program Specialist Lead of Behavioral Health**, she will lead behavioral health performance management and content development, oversee platform domain mappings, and support LEAs and TTA curriculum design.

Tenee Brown (MA, LPCC, PPSC), Mental Health & Wellness Coordinator leads and provides oversight of SCCOE's wellness program operation, EHR development, ECM implementation, and CYBHI Fee Schedule implementation. She has designed wellness-program processes, EHR configurations, and ECM implementation structures that streamline service delivery and strengthen school-based behavioral-health systems. As the **Program Specialist Co-Lead of Behavioral Health**, Tenee will co-lead behavioral health performance management and content development, oversee platform domain mappings, and support LEAs and TTA curriculum design.

Jaime Koo, Coordinator of Family & Community Engagement develops and oversees family engagement initiatives for the County of Santa Clara, runs a community liaison Community of Practice, and provides LEAs with technical assistance for these efforts as well as Tobacco Use Prevention Education. As

Community Liaison/Family Engagement Specialist, she will serve as the primary liaison between the project and participating school communities through stakeholder engagement sessions, communication, and ensuring culturally responsive implementation across diverse LEA contexts.

Lee Andersen, Director of Technology Infrastructure and Support Services directs operations and activities of the SCCOE Technology Infrastructure & Support Services Department. He has implemented SIS integration architectures and secure data-flow processes that enable schools to use digital tools effectively in ways that support improved student outcomes. He is responsible for planning and implementing delivery of services for users, ensuring effective operations, and serving as a technical liaison for current and future users. As the **IT/Systems Integration Coordinator**, Lee will coordinate SIS and IMPACTER platform integration activities for each LEA. He will also support Clever SSO provisioning and troubleshooting.

Adriana Huerta, Manager of Claims and Reimbursement with medical billing industry experience, develops, leads, and implements the billing operations for SCCOE's Youth Health & Wellness. She provides oversight of EHR development, technical operations of the CYBHI Fee Schedule, and support for the department's CYBHI Fee Schedule Billing Consortium. She has designed Medi-Cal billing processes, documentation workflows, and compliance systems that help LEAs expand access to reimbursable behavioral-health services, thereby increasing student supports and improving service quality. As the **CYBHI Behavioral Health Systems & Billing Specialist**, Adriana will provide subject matter expertise on the CYBHI Fee Schedule, Medi-Cal billing, and behavioral health service delivery. She will support LEAs in their understanding of how the BHPM data connects to CYBHI reimbursement pathways.

Corrine Frese, Director of Community Schools directs and provides oversight and leadership for the California Community Schools Partnership Program Regional Technical Assistance for the Bay Area. She navigates state and regional relationships, contracts, and advocacy for Community Schools and the SCCOE Youth Health and Wellness Department. She has developed training logistics systems, resource-distribution workflows, and fidelity-tracking processes that support consistent implementation of tools and practices across schools. As the **Program Associate of Training and TTA Support**, Corrine will support TTA logistics, prepare training materials, coordinate extended training, manage office hours, track participation, and document activities for fidelity reporting.

Krisan Meyer, Coordinator of Community Schools oversees and coordinates the operations of the California Community Schools Partnership Program Regional Technical Assistance for the Bay Area. She oversees regional operations and community school coaches who provide technical assistance throughout Santa Clara and the region. She has implemented coaching structures, data-review protocols, and site-visit processes that help LEAs adopt new tools and improvement routines with consistency across school sites. As **LEA Engagement Coordinator**, Krisan will manage relationships with the participating LEAs and coordinate visits, trainings, and data review.

Irina Shacter, Assistant Director of Data Governance manages the strategic processes and business plan for delivery of data governance and privacy support to the organization, school districts, and other partners for SCCOE's Research and Evaluation department. She has developed and implemented data-governance processes and protocols including FERPA/HIPAA compliance workflows and secure data-sharing protocols that enable schools to use data tools responsibly to improve student outcomes. As **Data Privacy & Compliance Coordinator**, she will oversee data governance compliance across all 18 sites, including FERPA, HIPAA, and California-NDPA requirements. She will execute data sharing agreements, monitor protocols, and coordinate with IMPACTER on data security standards.

Additional SCCOE staff supporting the project include a Research Analyst for Data and Accountability that will support with reporting, a Fiscal Analyst that will support with budget monitoring and subcontract monitoring, and an Administrative Support Specialist that will support with day-to-day administrative tasks such as calendaring, communication, and filing.

Resumes for key SCCOE personnel are included as an attachment.

Stanford University School Of Medicine, Center for Population Health Sciences, research partner. Stanford PHS contributes research expertise in population health science, psychometrics, educational measurement, and predictive analytics. Key personnel include Ben Domingue, Ph.D. (Associate Professor, Stanford GSE; Faculty Director, PACE), David Rehkopf, Sc.D., M.P.H. (Associate Professor, Stanford School of Medicine; Principal Investigator, AFC Health), and Isabella Chu, M.P.H. (Associate Director, PHS Data Core).

A signed Letter of Intent from Stanford PHS is included as an attachment. Resumes for key Stanford PHS personnel are included as an attachment.

Stanford Graduate School Of Education, research partner. Stanford GSE contributes expertise in educational measurement, psychometrics, and education policy research to the project's evaluation design and metrics development. Benjamin Domingue, Ph.D., Associate Professor at Stanford GSE and Faculty Director of Policy Analysis for California Education (PACE), brings deep experience designing measurement frameworks that connect student-level data to policy-relevant outcomes at scale. Dr. Domingue's research focuses on the psychometric foundations of educational assessment — including how measurement instruments perform across diverse populations and how individual-level data can inform system-level decisions — expertise directly applicable to validating the project's behavioral health competency metrics, ensuring cross-site comparability through the crosswalk methodology, and designing the multilevel analytic framework that will test the project's theory of change. Stanford GSE's role ensures that the project's measurement infrastructure meets the highest standards of psychometric rigor while remaining practically useful for LEA teams making real-time decisions about student support. Dr. Domingue's dual appointment across Stanford GSE and his collaboration with the Center for Population Health Sciences (described above) uniquely positions him to bridge the education measurement and population health analytics that together define this project's research contribution.

Stanford GSE's participation is covered under the joint Letter of Intent with Stanford's Center for Population Health Sciences, included as an attachment.

Impacter Education Corporation, subcontractor. IMPACTER has designed, built, and operates the behavioral health screening and performance management platform proposed for this project. The platform is already deployed and demonstrating measurable success in 136+ schools across seven California counties (San Diego, Ventura, San Mateo, El Dorado, Placer, Orange, Imperial), supporting over 200,000 monthly users and processing more than 5 billion words of student voice data annually. The platform's six behavioral health domains and scoring rubrics were co-developed with the San Diego County Office of Education and are fully reimbursable under the CYBHI fee schedule. Key staff:

Joshua Arnold, Ed.D., Co-Founder & Co-CEO Former Superintendent, Culver City Unified School District (10,000 students); former Assistant Superintendent, Los Alamitos USD (12,000 students). Co-developed the College Board's Pre-AP English curriculum. Harvard Graduate School of Education (M.Ed.), USC (Ed.D. in

Organizational Leadership). Leads IMPACTER's strategic partnerships and product direction.

Daniel Byun, Co-Founder & Co-CEO 25+ years building education-facing organizations. Early career at PricewaterhouseCoopers, KPMG, and MedPartners (now CVS Caremark). Founder & CEO of FLEX College Prep (2001–present), a multi-location education services organization. Leads IMPACTER's operations, deployment readiness, and partner management.

Dr. Michael Agostini, Behavioral Health Lead Leads IMPACTER's behavioral health screening practice including rubric design, crosswalk development, and LEA implementation support. Primary point of contact for this project.

Dave Hwang, Chief Technology Officer Leads platform development including ML scoring pipeline, data infrastructure (AWS: ECS, RDS PostgreSQL, S3, Lambda), SIS integration architecture (Aeries, PowerSchool, Infinite Campus), and security compliance.

Dr. Andrew O. Arnold, Scientific Advisor, ML & NLP Ph.D. in Machine Learning, Carnegie Mellon University. Former Senior Science Manager, Amazon Web Services AI Labs (led 45+ applied research scientists; built Amazon Kendra, Contact Lens, Connect Voice ID, Lookout for Metrics). Published at NeurIPS, ACL, NAACL, EMNLP, SIGIR, KDD. Multiple U.S. patents. Adjunct Professor, Applied AI, New York University. Advises on IMPACTER's transformer-based scoring models for accuracy, robustness, fairness, and scalability.

Amit P. Manghani, MS, MBA, Advisor, Product & Analytics Product leadership spanning Microsoft, Oracle, SAP, Informatica. Four U.S. patents in analytics and organizational data systems. Adjunct Faculty, Applied AI, University of San Diego. Advises on platform architecture and analytics design.

A signed Letter of Intent from Impacter Education Corporation is included as an attachment. Resumes for key IMPACTER personnel are included as an attachment.

Deveau Burr Group (DBG), subcontractor. DBG is a statewide technical assistance firm serving as a technical expert on the CYBHI Statewide Capacity Building and Technical Assistance grant, responsible for supporting all 58 county offices of education in technical implementation and capacity building for school-based behavioral health services. Principal Gina Plate, Senior Vice President of Education, has extensive experience designing TTA curricula for state-level education

initiatives, leading stakeholder engagement processes, and developing policy architecture for LEA systems improvement.

A signed Letter of Intent from DBG is included as an attachment. Resumes for key DBG personnel are included as an attachment.

Breaking Barriers California (Elizabeth Estes, JD), subcontractor. Elizabeth Estes is the founder and Executive Director of Breaking Barriers California, a statewide collaborative of leaders from across child-serving systems. Ms. Estes is also Clinical Professor of Public Policy at McGeorge School of Law, University of the Pacific, and Of Counsel at Atkinson, Andelson, Loya, Ruud & Romo, where she has represented school districts and county offices of education for over 25 years on special education, student services, and behavioral health matters. Breaking Barriers has published widely on Medi-Cal financing for school behavioral health, HIPAA/FERPA navigation for integrated care, and cross-agency systems alignment.

A signed Letter of Intent from Breaking Barriers California is included as an attachment. Resumes for key Breaking Barriers personnel are included as an attachment.

Applied Survey Research (ASR), subcontractor. ASR is a nonprofit social research firm with over 40 years of experience conducting applied research for public agencies, school districts, and nonprofits. Lisa Colvig-Niclai, MA, Senior Vice President of Planning and Evaluation, leads ASR's evaluation work on this project. ASR has conducted six county-level longitudinal studies using de-identified student data in Santa Clara, Alameda, San Francisco, and Marin counties.

A signed Letter of Intent from ASR is included as an attachment. Resumes for key ASR personnel are included as an attachment.

C.5. Staff Experience with School Behavioral Health

C.5. Describe your staff's experience with school behavioral health services or administration (if using subcontractors please include a letter of intent from each sub-contractor).

SCCOE Staff Behavioral Health Experience

The SCCOE operates Youth Health & Wellness programs serving students across Santa Clara County, including direct behavioral health services, prevention programming, and cross-agency work with the Santa Clara County Behavioral Health Services Department. As co-lead administrator of the CYBHI School-Linked Partnership and Capacity Grants, the SCCOE has direct operational experience supporting LEAs in building the infrastructure to deliver, bill for, and sustain school-based behavioral health services including fee schedule readiness, Medi-Cal provider enrollment, NPI registration, HIPAA/FERPA compliance, and claims submission systems. The SCCOE has also served as a consultant to LEAs on the selection and implementation of high-quality electronic health records (EHRs), a critical component of CYBHI infrastructure that requires the same data governance, interoperability, and system integration capabilities that underpin the behavioral health performance management system this project will establish.

Dr. Pilar Vázquez-Vialva, Director IV of Youth Health & Wellness, brings extensive school-based behavioral-health administration experience, leading countywide youth mental-health and wellness systems across four branches and 45 staff. She has overseen the expansion of more than 20 school-based wellness centers serving over 25,000 students, advancing coordinated mental-health access across urban, suburban, and rural school communities. Dr. Vázquez-Vialva designed and implemented behavioral-health billing infrastructure to increase sustainability of school-based services, and she has deep experience in cross-sector collaboration, integrating community-based organizations and county partners to strengthen school behavioral-health ecosystems. Her work includes launching prevention-to-intervention models, improving operational alignment across wellness programs, and cultivating youth-voice platforms that elevate student mental-health needs into systems-level planning.

Marie Busque (LCSW, PPSC) provides licensed clinical supervision across SCCOE's educator preparation and wellness programs, bringing licensed clinical expertise to the project's behavioral health content development, platform domain validation,

and LEA crosswalk consultations. She supervises clinical practice for educator-preparation and behavioral health programs, ensuring that behavioral-health frameworks, platform domain mappings, and screening protocols reflect evidence-based approaches appropriate for school settings. Her work includes direct consultation with LEAs on behavioral-health crosswalks and the design of workflows that translate student-level data into intervention planning.

Tenee Brown (MA, LPCC, PPSC) leads SCCOE's wellness program operations including EHR development, Enhanced Care Management implementation, and CYBHI Fee Schedule implementation with direct operational experience building the exact behavioral health billing and service delivery infrastructure that participating LEAs will need. Adriana Huerta manages claims and reimbursement operations for SCCOE's Youth Health & Wellness department, including oversight of CYBHI Fee Schedule technical operations and SCCOE's CYBHI Fee Schedule Billing Consortium providing the hands-on Medi-Cal billing expertise that will support LEAs in understanding how BHPM data connects to sustainable reimbursement pathways.

Krisan Meyer, Coordinator of Social Emotional Wellness, has direct experience administering school-based behavioral-health services across multiple settings. At SCCOE, she oversees practitioners who provide reimbursable behavioral-health services and leads suicide-prevention, crisis-response, and multi-tiered mental-health expansion initiatives across K–12 districts. As a Principal of Special Education Programs, she supervised academic and therapeutic programs serving students with emotional, behavioral, and psychiatric needs, ensuring proper clinical documentation, service alignment, and multi-disciplinary coordination. She has coordinated PBIS implementation, chronic absenteeism interventions tied to behavioral-health factors, trauma-informed professional learning, and cross-agency service delivery. Her prior work as a Program Specialist and Special Education teacher further grounds her expertise in behavioral-health service planning, IEP-based social-emotional supports, and mental-health referral pathways.

Corrine Frese, Program Associate for Training and TTA Support, contributes extensive school-site behavioral-health administration experience from her tenure as a principal and assistant principal. She has led schoolwide MTSS implementations, SEL curriculum rollouts (e.g., Character Strong), PBIS frameworks, IEPs, SSTs, and 504 processes connected to behavioral-health needs. She coordinated site-level mental-health teams including school psychologists, counselors, and external mental health agencies to provide SEL instruction,

counseling access, suicide-risk assessments, and social-emotional supports. She also supported family engagement and professional development that improved school climate, cultural responsiveness, and student well-being.

Irina Shacter manages data governance and privacy support across SCCOE and its partner districts, bringing direct experience executing data sharing agreements and navigating FERPA, HIPAA, and California-NDPA compliance in behavioral health contexts.

Collectively, the SCCOE team brings a full continuum of school behavioral-health expertise spanning clinical supervision, wellness-center operations, school-site leadership, multi-tiered systems, crisis response, behavioral-health billing, and BH data governance.

Partner Behavioral-Health Expertise

Stanford University Center for Population Health Sciences. Through the AFC Health project (funded by ARPA-H), Stanford is building research infrastructure to study the relationship between educational experiences and health outcomes using the PRIME Registry - the nation's largest primary care clinical data registry. This behavioral health research partnership enables the project to examine whether improvements in student behavioral health competency scores predict downstream health and education trajectories, extending the project's measurement framework beyond school-level performance management into population-level behavioral health intelligence.

A Letter of Intent from Stanford PHS is included as an attachment.

Stanford Graduate School Of Education. Stanford GSE contributes direct expertise in the measurement science underlying school behavioral health assessment. Dr. Benjamin Domingue's research focuses on how assessment instruments perform across diverse student populations — a critical concern for any behavioral health screening system deployed across multiple LEAs serving different demographic communities. His work on measurement invariance and differential item functioning directly informs the project's ability to ensure that behavioral health competency scores mean the same thing for a Latinx student in East San Jose as for a white student in Cupertino — a psychometric equity question that most school-based behavioral health instruments never address. For this project, Dr. Domingue advises on the validity and cross-population fairness of the screening platform's six-domain scoring rubrics, contributes to the Indicators, Outcomes, and

Metrics Brief by grounding metric selection in psychometric evidence, and supports the design of the multilevel analytic framework that will test whether improvements in student behavioral health competency scores predict meaningful changes in downstream education and health trajectories. This behavioral health measurement expertise — situated at the intersection of educational assessment science and population health research — ensures that the project's BHPM system produces data that is not only operationally useful for school teams but scientifically defensible for statewide policy recommendations.

Stanford GSE's participation is covered under the Letter of Intent with Stanford's Center for Population Health Sciences, included as an attachment.

Breaking Barriers California (Elizabeth Estes, JD). Ms. Estes brings over two decades of direct experience at the intersection of education law and school behavioral health services, including representation of school districts on behavioral health programming, special education, HIPAA/FERPA compliance, IEP processes, and cross-agency coordination. Breaking Barriers' statewide Integrated Care Symposium convenes hundreds of education, health, probation, social services, and regional center leaders annually to address systemic barriers to children's behavioral health, providing Ms. Estes with a current, comprehensive view of the implementation challenges California LEAs face in delivering and sustaining school-based behavioral health services.

A Letter of Intent from Breaking Barriers California is included as an attachment.

Impacter Education Corporation. IMPACTER's platform is purpose-built for school behavioral health measurement, capturing students' own spoken reflections on their behavioral health functioning across six validated domains, scoring those reflections against rubrics grounded in the research of Harvard's Making Caring Common project and the Yale Center for Emotional Intelligence, and producing individually actionable MTSS tier assignments tied to each student's SIS profile. Co-CEO Joshua Arnold's 20+ years as a K–12 superintendent, assistant superintendent, and principal provides direct administrative perspective on how behavioral health services integrate into school operations, staffing models, collective bargaining environments, and student support systems. Dr. Michael Agostini leads IMPACTER's behavioral health screening practice, including the design of screening rubrics across all six behavioral health domains, development of crosswalk methodologies that map LEA-specific behavioral health frameworks onto the platform's competency architecture, and direct support to school counselors and administrators during implementation, ensuring that the platform's outputs are

practical and actionable within existing MTSS workflows and student services structures.

A Letter of Intent from IMPACTER is included as an attachment.

Deveau Burr Group (DBG). Through its CYBHI role supporting all 58 County Offices of Education, DBG has direct experience supporting school behavioral health services delivery, designing structured approaches to behavioral health program implementation, facilitating stakeholder engagement between LEAs and county behavioral health departments, and developing sustainability frameworks that help schools maintain behavioral health programs beyond initial grant funding.

A Letter of Intent from DBG is included as an attachment.

Applied Survey Research (ASR). ASR has completed longitudinal studies examining the relationship between early intervention, school-based services, and student outcomes across multiple California counties including Santa Clara County partnerships with school-linked services programs, behavioral health navigators co-located in schools, and foster youth educational outcome evaluations. ASR's evaluation framework for this project will measure whether the BHPM system produces measurable improvements in student behavioral health outcomes, providing the evidence base for statewide scalability recommendations.

A Letter of Intent from ASR is included as an attachment.

Together, SCCOE staff and partners bring comprehensive school-based behavioral-health service and administration experience including clinical practice, school-site mental-health leadership, billing and compliance, data governance, MTSS-SEL integration, schoolwide prevention programs, crisis intervention, and behavioral-health program evaluation positioning the project team to fully support LEAs in implementing a school-based behavioral-health performance management system.

Attachment 4: Proposed Workplan

Deliverables For each of the following, describe your approach and timeline for completing the indicated Scope of Work responsibilities and deliverables. Indicate project milestones and completion dates for each item, and specify all date(s) as days, weeks, months, quarters, and/or years.		
Deliverable 1: Recruitment Outcomes Summary		Draft: First 90 days
Deliverable	Requirement	
	1. Describe your approach to recruiting six (6) LEAs and three (3) schools within each LEA to participate in school-based BHPM.	
Requirement	<i>Describe the steps, activities, or milestones that will be completed to fulfill the deliverable and a general timeline for their completion.</i>	<i>Start Date and End Date (mm/dd/yy to mm/dd/yy)</i>
1	Activity 1.1: Develop and execute approach to recruiting six (6) LEAs and three (3) schools within each LEA to participate in school-based BHPM <i>(SCCOE lead — Pilar Vazquez-Vialva/project management, Krisan Meyer/LEA outreach, Irina Shacter/data privacy & security, Stephanie Gomez/fiscal, Claudia Rubio/admin support; IMPACTER support; DBG support).</i> Develop recruitment criteria prioritizing LEAs meeting multiple readiness indicators: current BHSSA-funded behavioral health programming, existing MTSS infrastructure with counselor/wellness coordinator staffing, equity multiplier eligibility, and CYBHI fee schedule participation or readiness. Recruiting LEAs with overlapping initiative eligibilities demonstrates cross-initiative coherence and fiscal efficiency — strengthening the case for statewide	05/01/26 to 06/30/26

	BHPM scalability. Create recruitment materials including project overview brief, LEA information packet detailing the \$120,000 per-LEA participation incentive (\$720,000 total), scope expectations, data sharing requirements, and timeline. Conduct targeted outreach to BHSSA-funded LEAs through SCCOE superintendent network, Bay Area COE/LEA relationships, and CYBHI/CEI networks. Host informational briefings. Leverage the project behavioral health screening platform — already deployed across seven California counties (San Diego, Ventura, San Mateo, El Dorado, Placer, Orange, Imperial) supporting 200,000+ monthly users — as tangible demonstration for prospective LEAs. As part of LEA and school recruitment, privacy, and data security considerations will be identified and addressed early to support informed participation and compliance, including coordination with legal counsel as needed to review privacy and security implications related to data sharing agreements and the proposed performance management tool.	
1	Activity 1.2: Execute formal participation agreements with six LEAs and complete school selection for 18 sites <i>(SCCOE lead — Pilar Vazquez-Vialva/project management, Stephanie Gomez/fiscal, Irina Shacter/data governance, Claudia Rubio/admin support; IMPACTER support; Breaking Barriers support).</i> Execute formal participation agreements with six LEAs establishing roles, responsibilities, data governance, and timelines. Data governance considerations will inform recruitment discussions to ensure participating partners clearly understand data roles, responsibilities, and limitations prior to engagement. Distribute \$120,000 participation incentive to each LEA (\$720,000	06/01/26 to 07/30/26

	total pass-through) supporting dedicated staff time for training, data review, and collaborative learning. Coordinate with each LEA superintendent, director of student services, and behavioral health lead to identify three schools per LEA (18 total). Selection criteria: active BHSSA funding at the school level (per RFP requirement that all recruited schools must be recipients of BHSSA funding), existing behavioral health programming or counselor staffing, willingness to participate in screener administration and data review cycles, adequate technology infrastructure (devices, internet, Clever-compatible SSO), and sufficient enrollment for meaningful performance management analysis. Complete within 90 days of contract execution.	
1	Activity 1.3: Complete technology and data readiness assessments at all 18 school sites <i>(IMPACTER lead; SCCOE support — Lee Andersen/SIS & technology infrastructure, Krisan Meyer/LEA engagement).</i> Conduct detailed readiness assessment at each of the 18 school sites. The behavioral health screening platform is already built, validated, and operational — assessment focuses on local configuration rather than tool development. Document for each site: SIS in use (Aeries, PowerSchool, Infinite Campus, Synergy, Schoolwise), existing screening tools or wellness surveys, data workflows from collection through reporting, staff roles for behavioral health data, MTSS tier structures and referral pathways, device availability and student-to-device ratios, Clever SSO compatibility, and SIS integration requirements for automated rostering/demographic synchronization. Produce	06/15/26 to 08/15/26

1	per-school readiness profiles informing platform configuration, SIS integration priorities, and individualized TTA Plan (Deliverable 3). Activity 1.4: Compile and submit Recruitment Outcomes Summary to Commission <i>(SCCOE lead — Deborah Gorgulho/Commission relationship, Pilar Vazquez-Vialva/project management, Stephanie Gomez/fiscal, Research Analyst/data & reporting; all partners contribute).</i> Compile comprehensive summary: all recruited LEAs and schools with organizational profiles, student demographics (enrollment, race/ethnicity, SES, EL%, foster youth%, students with disabilities), regional distribution, baseline behavioral health capacity indicators, technology readiness findings, and each LEA rationale for participation. Include evaluation framework documenting recruitment methodology, selection criteria, and baseline conditions for subsequent impact measurement. Submit draft within 90 days of contract execution.	07/15/26 to 08/15/26
Deliverable 2: Indicators, Outcomes, and Metrics Brief		Draft: First 90 days Final: First 120 days
Deliverable	Requirement	
	1. Describe your approach to completing the literature review to identify relevant indicators, outcomes, and metrics in performance management related to school behavioral health.	

	2. Describe your approach to stakeholder engagement with LEAs, educators, and county behavioral health department staff (where possible), to identify relevant process and outcomes metrics, which should include. Please describe the type and frequency of engagement efforts of planned activities.	
Requirement	<i>Describe the steps, activities, or milestones that will be completed to fulfill the deliverable and a general timeline for their completion.</i>	<i>Start Date and End Date (mm/dd/yy to mm/dd/yy)</i>
1	Activity 2.1: Complete literature review to identify relevant indicators, outcomes, and metrics in performance management related to school behavioral health <i>(IMPACTER and Stanford lead; SCCOE support — Pilar Vazquez-Vialva/project input; Research Analyst/research and analysis).</i> Systematic review of school-based behavioral health performance metrics research: evidence-based BHPM frameworks, validated K-12 outcome measures, MTSS-aligned process/outcome indicators, and best practices from comparable initiatives (CYBHI, Project AWARE, school-based Medicaid, state PBIS). Review emerging research on authentic assessment and open-language behavioral health measurement — spoken-language prompts and ML scoring pipelines as alternatives to Likert-scale instruments like the California Healthy Kids Survey. Unlike anonymized aggregate surveys, open-language screeners produce student-level, roster-synced, actionable data enabling immediate MTSS tiering rather than retrospective reporting. Stanford contributes predictive analytics expertise linking behavioral health competency data to longitudinal health and education outcomes through the PRIME Registry framework. Produce annotated bibliography and synthesis identifying the most relevant, feasible, and psychometrically defensible indicators.	05/01/26 to 07/30/26

2	Activity 2.2: Complete stakeholder engagement with LEAs, educators, and county behavioral health department staff to identify relevant process and outcomes metrics <i>(SCCOE and DBG lead — DBG/BH content, Pilar Vazquez-Vialva/project management, Marie Busque & Tenee Brown/BH content & crosswalk consultations, Krisan Meyer/LEA engagement; IMPACTER support).</i> Structured sessions with county behavioral health department staff, LEA behavioral health leads, counselors, site administrators, county behavioral health staff (where accessible), and BHSSA grantees. Crosswalk consultations with each LEA mapping existing frameworks onto the validated six-domain competency architecture (Self-Insight, Emotional Resilience, Conflict Resolution, Effective Help-Seeking, Relational Awareness, Reflective Growth) — co-developed with the San Diego County Office of Education. Minimum two sessions per LEA (12 total) plus two cross-LEA convenings. Monthly virtual check-ins with each LEA team.	07/01/26 to 07/30/26
1 & 2	Activity 2.3: Synthesize literature and stakeholder input into draft Indicators, Outcomes, and Metrics Brief <i>(IMPACTER lead; SCCOE support — Pilar Vazquez-Vialva/project management, Irina Shacter/data privacy assessment, Marie Busque & Tenee Brown/BH content & crosswalk input, Research Analyst/research and analysis, Adriana Huerta/CYBHI billing, Irina Shacter/data governance; Applied Survey Research (ASR) support; Stanford support).</i>	08/01/26 to 08/29/26

	Define core indicators by category: process (screening completion rates, administration fidelity, training participation, data review frequency), outcome (MTSS tier distribution and movement, domain-level scores, growth toward school-wide goals), contextual (demographics, service receipt, attendance, behavioral patterns). Align each indicator with BHSSA statutory goals, CYBHI fee schedule categories, and LEA frameworks. Include crosswalk methodology, data collection specs, feasibility analysis, and measurement timeline. The Metrics Brief will assess the privacy and security implications of the data being collected, including data sources, data flows, and collection methods. Clear data governance processes will be established to provide explicit operational guidance for all involved parties, ensuring data is handled consistently, securely, and in alignment with applicable privacy requirements.	
1 & 2	Activity 2.4: Present final Metrics Brief for Commission approval <i>(SCCOE lead — Deborah Gorgulho/Commission relationship; Stephanie Gomez/fiscal, Claudia Rubio/logistics; all partners contribute).</i> Structured review with all six LEA teams. Present to Commission for preliminary input. Resolve standardization vs. customization tensions through crosswalk methodology. Finalize indicator set with definitions, fidelity benchmarks, data collection specs, and reporting schedules. Submit within 120 days.	09/01/26 to 09/30/26

	Activity 2.5: Project management and administrative support for all Deliverable 2 activities (SCCOE — Pilar Vazquez-Vialva/project management, Claudia Rubio/administrative support, Stephanie Gomez/fiscal management).	05/01/26 to 10/31/26
Deliverable 3: Training and Technical Assistance (TTA) Plan		Draft: First 90 days Final: First 120 days
Deliverable	Requirement 1. Describe the activities and timeline for conducting a review of each LEA and school's current behavioral health data collection and reporting activities and systems, including an overview of each school's current procedures for using data for goal-setting and tracking. 2. Describe your planned individualized training and capacity building activities and goals for educators. 3. Describe your planned assessment methods and tools to measure and track progress towards anticipated goals.	
Requirement	<i>Describe the steps, activities, or milestones that will be completed to fulfill the deliverable and a general timeline for their completion.</i>	<i>Start Date and End Date (mm/dd/yy to mm/dd/yy)</i>
1	Activity 3.1: Conduct review of each LEA and school's current behavioral health data collection and reporting activities and systems, including current procedures for using data for goal-setting and tracking	06/15/26 to 08/15/26

2	<i>(IMPACTER and DBG lead; SCCOE support — Pilar Vazquez-Vialva/project input, Marie Busque & Tene Brown/BH systems review, Krisan Meyer/site coordination).</i> Detailed review of each LEA and school current behavioral health data collection, reporting systems, and goal-setting procedures. For each of the 18 sites document: SIS in use and behavioral health data configuration, existing screening tools or wellness surveys, data workflows (collection through storage through reporting), staff roles (who collects, reviews, acts on findings), MTSS tier structures and criteria for tier assignment, referral pathways from screening to services, and extent behavioral health data informs goal-setting or improvement planning. Produce aggregate TTA needs assessment identifying common gaps, site-specific strengths, and customization requirements driving the individualized TTA curriculum. Activity 3.2: Deploy operational behavioral health screening and performance management platform across all 18 school sites, including technology configuration, SIS integration, data privacy agreements, and CYBHI fee schedule activation <i>(IMPACTER lead; SCCOE support — Lee Andersen/SIS integration & Clever SSO, Irina Shacter/CA-NDPA data privacy agreements, Adriana Huerta/CYBHI fee schedule activation, Jessica Simpson/policy & regulatory alignment; DBG support).</i>	08/01/26 to 11/30/26
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2 & 3	The platform is already built, validated, and serving 200,000+ monthly users across seven California counties — deployment focuses on local configuration rather than tool development, directing project resources toward capacity building. Deployment includes: site licensing and provisioning; LEA-specific dashboard customization (role-based views); crosswalk mapping of up to six LEA behavioral health frameworks onto the validated six-domain competency architecture; SIS integration (Aeries, PowerSchool, Infinite Campus, Synergy, Schoolwise) for automated rostering and demographic synchronization; ML scoring pipeline activation and validation; California-NDPA data privacy agreements; Clever Single Sign-On provisioning; API interoperability testing, including EHR system interoperability where applicable. Platform is reimbursable under the CYBHI Fee Schedule at \$4.81 per student administration (CPT Code 96127, U4 modifier), establishing a self-sustaining funding model from day one. The project’s technology investment covers LEA-specific configuration, SIS integration, and staff training — not software development. After contract conclusion, participating LEAs continue platform access through standard CYBHI billing at zero net cost to district general funds. Activity 3.3: Design individualized training and capacity building curriculum with goals for educators, grounded in implementation science <i>(IMPACTER and DBG lead; SCCOE support — Pilar Vazquez-Vialva/project input, Marie Busque & Teneé Brown/BH content & domain validation, Corrine Frese/training and curriculum input; Breaking Barriers support).</i> Comprehensive TTA curriculum grounded in implementation science (NIRN Active Implementation Frameworks, Fixsen implementation stages, PDSA	08/01/26 to 09/30/26
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	cycles). Because the technology platform is already built, TTA focuses entirely on building human capacity to use behavioral health data for performance management. Training modules: purpose and principles of school BHPM; connecting screening data to student services and MTSS referral pathways; data-informed goal-setting using baseline screener results and PDSA cycles; interpreting dashboard data and leading data walkthroughs; understanding student-level roster-synced actionable data vs. aggregated survey reporting; sustainability planning. Assessment instruments to measure educator knowledge gains, confidence in data use, and observable practice changes. Customize for each LEA local context.	
2	Activity 3.4: Deliver initial training at all 18 school sites for counselors, administrators, wellness coordinators, and behavioral health staff <i>(IMPACTER lead; SCCOE support — Corrine Frese/training logistics, Krisan Meyer/LEA coordination, Marie Busque & Tenée Brown/crosswalk validation, Claudia Rubio/admin support; DBG support).</i> TTA includes: screener administration training — scheduling, student communication, classroom/advisory protocols, make-up procedures, multilingual support (students respond in any language), 5-10 min per student, no student training required (1-2 hrs/school); dashboard interpretation — individual student profiles with spoken response transcripts, school-wide views, MTSS tier distributions, subgroup disaggregation, progress monitoring (2-3 hrs/school); crosswalk consultation validating each LEA framework mapping (2-4 hrs/LEA); BHPM goal-setting workshops using baseline screening data for specific, measurable school-wide growth goals; initial performance management coaching sessions establishing ongoing cadence.	10/01/26 to 01/31/27

2 & 3	Activity 3.5: Compile and submit comprehensive TTA Plan document to Commission <i>(SCCOE lead — Deborah Gorgulho/Commission relationship, Pilar Vazquez-Vialva/project management, Corrine Frese/TTA plan compilation; Jessica Simpson/policy & process alignment; all partners contribute).</i> Comprehensive TTA Plan: Current-state assessment findings for each of 18 schools; individualized training schedule; capacity building goals per site; assessment methods and tools to measure/track progress (educator knowledge assessments, practice observation protocols, platform usage metrics, administration fidelity indicators, MTSS tier movement as leading indicator); technology solution specs and deployment status; ongoing TA support plan with cadence and modalities; communities of practice/network improvement communities. Submit draft within 90 days, final within 120 days.	09/01/26 to 09/30/26
2 & 3	Activity 3.6: Provide ongoing TA, platform maintenance, and implementation support for approximately 20 months <i>(IMPACTER lead; SCCOE support — Krisan Meyer/LEA relationship management, Corrine Frese/office hours & fidelity tracking, Research Analyst/data quality monitoring; DBG support).</i> Ongoing TTA will include individualized coaching on data interpretation, goal monitoring, MTSS-aligned service referral; virtual weekly office hours; refresher training before each screener window; SIS integration maintenance; platform	11/01/26 to 06/30/28

	technical support and Help Center; data quality monitoring and fidelity tracking with follow-up to low-completion sites; SCCOE-led LEA leadership check-ins ensuring district commitment; communities of practice/network improvement communities; cross-team coordination aligning TTA with quarterly learning collaboratives (Deliverable 4) and student support and outcome reporting (Deliverable 5). TA model builds sustainable local capacity — teaching LEA and school staff to interpret and act on their own data independently.	
Deliverable 4: Quarterly Learning Collaborative Summary		Due: Quarterly during Years 1 and Q1-Q3 in Year 2.
Deliverable	Requirement	
	Describe your approach and timeline to organize, host, and facilitate ongoing virtual or in-person learning collaboratives for participating LEAs and schools. Learning collaboratives shall meet at least once per quarter, and bring together best practices, share challenges and identify solutions. Include how you plan to synthesize these learnings into quarterly summaries.	
Requirement	<i>Describe the steps, activities, or milestones that will be completed to fulfill the deliverable and a general timeline for their completion.</i>	<i>Start Date and End Date (mm/dd/yy to mm/dd/yy)</i>
1	Activity 4.1: Design learning collaborative framework, facilitation plan, and quarterly schedule	08/01/26 to 10/31/26

	<i>(DBG lead; SCCOE support — Pilar Vazquez-Vialva/project oversight, Jaime Koo/community liaison, Jessica Simpson/policy content, Irina Shacter/data governance, Adriana Huerta/CYBHI billing; IMPACTER support; Breaking Barriers support).</i> Design collaborative structure, curriculum arc, and facilitation methodology. Develop virtual/hybrid meeting infrastructure of communities of practice/network improvement communities. Create participant engagement expectations and norms. Design agenda templates aligned to BHPM implementation phases: early sessions on launch and adoption, mid-project on data interpretation and goals, later sessions on sustainability and scalability. Data-sharing protocols governing aggregation levels and privacy. Plan Year 1 schedule alternating in-person and virtual. Breaking Barriers and SCCOE review cross-system policy content, HIPAA/FERPA data governance protocols, and Medi-Cal sustainability architecture for the collaborative curriculum.	
1	Activity 4.2: Convene Q1 Learning Collaborative (In-Person) — bring together best practices, share challenges, and identify solutions <i>(DBG lead; SCCOE support — Pilar Vazquez-Vialva/project oversight, Jaime Koo/community liaison, Irina Shacter/data governance; Breaking Barriers support; IMPACTER support).</i> Convene all six LEA teams for BHPM system launch review through the communities of practice/network improvement communities. Present aggregate dashboard data from first screener administration across sites — giving teams their first cross-site comparisons using live platform data.	05/01/26 to 08/31/26

1	Facilitate cross-LEA discussion on adoption barriers, completion rate strategies, early wins. Role-based breakout sessions (counselors, administrators, LEA leadership). Breaking Barriers and SCCOE provides strategic advisory on data governance and compliance questions arising from initial implementation. Synthesize into Q1 Summary for Commission. Activity 4.3: Convene Q2 Learning Collaborative (Virtual with Regional Breakouts) — data interpretation, growth goal refinement, and early MTSS tier movement <i>(DBG lead; SCCOE support — Pilar Vazquez-Vialva/project oversight, Jaime Koo/community liaison, Marie Busque & Tene Brown/crosswalk, MTSS; IMPACTER support).</i> Focus on data interpretation, growth goal refinement, early MTSS tier movement through the communities of practice/network improvement communities. Cross-LEA comparison data. Guided data walkthrough exercises where teams practice interpreting their own dashboard data. Address data quality and fidelity challenges. Regional breakouts for geographic peer-building. Breaking Barriers provides technical assistance on Medi-Cal billing pathways and cross-agency data sharing. Synthesize into Q2 Summary.	08/01/26 to 10/30/26
1	Activity 4.4: Convene Q3 Learning Collaborative (In-Person) — longitudinal progress, sustainability planning, and school-county behavioral health partnerships	11/01/26 to 01/31/27

	<i>(DBG lead; SCCOE support — Pilar Vazquez-Vialva/project oversight, Jaime Koo/community liaison; Adriana Huerta/CYBHI billing & sustainability; IMPACTER support; Breaking Barriers support).</i> Focus on longitudinal progress, sustainability planning, school-county behavioral health partnerships through the communities of practice/network improvement communities. Three-quarter longitudinal data showing tier movement trends, domain-level growth, progress toward goals. Sustainability strategies: CYBHI fee schedule reimbursement (the project's screener is already billable at \$4.81/administration under CPT 96127, U4 modifier, at zero general fund cost), special education mental health dollars, LCFF supplemental/concentration grants, embedding BHPM in LCAP/SPSA cycles. Invite county behavioral health representatives. Breaking Barriers leads sustainability and cross-system integration session. Synthesize into Q3 Summary.	
1	Activity 4.5: Convene Q4 and Year 2 Q1-Q3 Learning Collaboratives (four sessions) — synthesize learnings into quarterly summaries <i>(DBG lead; SCCOE support — Pilar Vazquez-Vialva/project oversight, Jaime Koo/community liaison, other SCCOE staff per topic; Stanford support; IMPACTER support; Breaking Barriers support).</i> Alternating in-person and virtual communities of practice/network improvement communities. Q4: year-one reflection, full-year longitudinal review, model refinements. Y2-Q1: sustained quality, advanced data use	02/01/27 to 03/31/28

	(subgroup analysis, equity-focused outcomes review). Y2-Q2: statewide scalability recommendations. Y2-Q3: culminating convening — final data review, lessons learned, Final Report preparation (Deliverable 6). Stanford contributes predictive analytics findings linking behavioral health data to longitudinal outcomes. Breaking Barriers provides ongoing strategic advisory across all sessions on policy, compliance, and statewide scalability. Quarterly summaries for each session.	
Deliverable 5: Students Services and Outcome Report		Due: Quarterly during Years 1 & Q1-Q3 in Year 2.
Deliverable	Requirement The Contractor shall facilitate the collection and summarization of monthly school-level data to create: a) Individual school summaries (one per school per quarter) detailing monthly performance and trends in key student outcomes and metrics of success. b) Overall summaries (one per quarter) detailing quarterly LEA trends for participating schools and commonalities across region, population served, etc. as applicable.	
Requirement	<i>Describe the steps, activities, or milestones that will be completed to fulfill the deliverable and a general timeline for their completion.</i>	<i>Start Date and End Date (mm/dd/yy to mm/dd/yy)</i>
1	Activity 5.1: Establish monthly school-level data collection infrastructure and reporting templates	10/01/26 to 12/31/26

1	<i>(IMPACTER lead; SCCOE support — Pilar Vazquez-Vialva/project oversight, Research Analyst/data quality monitoring, Irina Shacter/privacy compliance, Claudia Rubio/admin support; ASR support).</i> Establish complete monthly school-level data collection through the behavioral health screening platform. The automated ML scoring pipeline processes all student administrations — audio transcription of spoken responses, NLP analysis, rubric-aligned scoring on the four-point scale (Foundational, Developing, Competent, Advanced) across all six domains, automated MTSS tier assignment (Tier 1 Universal, Tier 2 Targeted, Tier 3 Intensive). Because data is tied to individual students through SIS integration and synced to school rosters with role-based permissions, results are immediately actionable — not anonymized or delayed like traditional survey instruments. Implement automated monthly data extraction, data quality checks, and fidelity monitoring dashboards. Establish reporting templates for all subsequent quarterly reports. Outcome reporting will adhere to the minimum necessary standard to protect student privacy; SCCOE will not access individual-level data unless explicitly authorized and required for approved project purposes. Reporting activities will rely on aggregate and/or de-identified data to support performance monitoring while maintaining compliance with privacy and security requirements. Activity 5.2: Produce Q1 Student Services and Outcome Reports — 18 individual school summaries and one cross-LEA summary	05/01/26 to 08/31/26
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1	<i>(IMPACTER lead; SCCOE support — Pilar Vazquez-Vialva/project oversight, Krisan Meyer/LEA coordination, Research Analyst/report support; ASR support).</i> Each school summary: monthly screener completion rates and fidelity metrics; MTSS tier distribution across all six domains; domain-level score distributions with mean scores and standard deviations; demographic subgroup breakdowns (race/ethnicity, gender, grade, EL status, foster youth, SES); initial progress toward school-wide growth goals identified in the TTA Plan (Deliverable 3). Cross-LEA summary: identifies commonalities and differences by region, population, school characteristics, implementation stage. Coordinate data review sessions with each LEA team building local capacity to interpret and act on their data. Activity 5.3: Produce Q2 Student Services and Outcome Reports with longitudinal comparisons <i>(IMPACTER lead; SCCOE support — Pilar Vazquez-Vialva/project oversight, Krisan Meyer/LEA coordination, Research Analyst/report support; ASR support).</i> 18 school summaries + cross-LEA summary. Q2 adds longitudinal comparisons: quarter-over-quarter domain-level score changes, MTSS tier movement analysis (percentage moving between tiers, disaggregated by direction and demographic subgroup), updated growth goal tracking with projected trajectories. Administration fidelity trends; flag sites with declining completion for follow-up TA. Format aligned to Sample Student Services and Outcomes Report specs (Attachment 5) and Metrics Brief framework (Deliverable 2). Coordinate LEA data review sessions.	08/01/26 to 10/30/26
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1	Activity 5.4: Produce Q3 Student Services and Outcome Reports with expanded longitudinal and equity analysis <i>(IMPACTER lead; SCCOE support — Pilar Vazquez-Vialva/project oversight, Krisan Meyer/LEA coordination, Research Analyst/report support; Stanford; ASR support).</i> 18 school summaries + cross-LEA summary. Expanded three-quarter longitudinal analysis. Identify students with sustained Tier 3 needs (intensified services indicated), positive tier movement (response to intervention), and implementation quality indicators. Cross-domain analysis (e.g., Conflict Resolution improvement associated with Relational Awareness gains). Equity analysis examining whether outcomes are equitable across demographic subgroups — the kind of disaggregated, student-level insight aggregated survey instruments cannot deliver. Coordinate LEA data review sessions.	11/01/26 to 01/31/27
1	Activity 5.5: Produce Q4 and Year 2 Q1-Q3 Reports (four quarterly cycles) with year-over-year comparisons and evaluation-ready data <i>(IMPACTER lead; SCCOE support — Pilar Vazquez-Vialva/project oversight, Krisan Meyer/LEA coordination, Research Analyst/report support; Stanford support; ASR support).</i>	02/01/27 to 03/31/28

	18 school summaries + cross-LEA summary over quarterly cycles. Continue providing longitudinal analysis, cross domain analysis, and equity analysis. Coordinate LEA data review sessions. Full year-over-year comparisons, comprehensive subgroup disaggregation. Dosage analysis examining relationship between service receipt intensity and behavioral health outcomes. Stanford contributes predictive analytics linking behavioral health screening data to longitudinal health outcomes through the PRIME Registry. Evaluation-ready data exports formatted for statistical analysis software (R, SPSS, Stata). Data structured for Final Report (Deliverable 6) and Performance Management Training Guide (Deliverable 7). Longitudinal student-level dataset with baseline scores, time-series outcomes, MTSS service receipt, and demographic covariates supporting multilevel analytic framework testing the project theory of change.	
Deliverable 6: Final Report		Due: April 6, 2028
Deliverable	Requirement	
	Describe your approach and timeline for the development of a final report that addresses the following: a) An overview of the key metrics and outcomes identified in the Indicators, Outcomes, and Metrics Brief, including a description of how these indicators, metrics and outcomes were identified. b) An overview of participating LEAs and schools, including program characteristics, populations served, regional distribution, and baseline data on key indicators, outcomes and metrics, as identified in the Indicators, Outcomes, and Metrics Brief.	

	c) Overview of school data collection and reporting practices prior to receiving technical assistance in performance management. d) Themes in baseline data and trends for key indicators, outcomes and metrics as identified in the Indicators, Outcomes, and Metrics Brief. e) An overview of the approach to performance management utilized in this project, including key activities engaged by participating LEAs and schools. f) Common challenges faced and solutions engaged in implementing school behavioral health performance management. g) Qualitative data (such as interview excerpts or extended quotes) that captures the experiences of participating schools.	
Requirement	<i>Describe the steps, activities, or milestones that will be completed to fulfill the deliverable and a general timeline for their completion.</i>	<i>Start Date and End Date (mm/dd/yy to mm/dd/yy)</i>
1	Activity 6.1: (a-b) Develop overview of key metrics and outcomes, and profiles of participating LEAs and schools <i>(SCCOE and IMPACTER lead — Joshua Arnold/project management; Pilar Vazquez-Vialva/project oversight; Research Analyst/data compilation; Marie Busque & Tenée Brown/subject matter expertise, Krisan Meyer/LEA profiles, Research Analyst/data compilation; Stanford support; ASR support).</i>	01/01/28 to 02/28/28

1	Comprehensive narrative of behavioral health performance indicators and outcome metrics from the Metrics Brief (Deliverable 2) — including identification process (literature review, stakeholder engagement, rationale), crosswalk methodology ensuring local relevance with cross-site comparability. Detailed profiles of all six LEAs and 18 schools: organizational characteristics, populations served, regional distribution, baseline data on all key indicators, pre-existing behavioral health infrastructure. Activity 6.2: (c-d) Document pre-intervention data practices and conduct longitudinal trend analysis of baseline data themes <i>(Stanford and IMPACTER lead; SCCOE support — Pilar Vazquez-Vialva/project input, Marie Busque & Tenée Brown/subject matter expertise, Research Analyst/data compilation; ASR support).</i> Document each school pre-intervention data practices from readiness assessments (Deliverable 1) and current-state assessments presented to the Commission with the TTA Plan (Deliverable 3). Full longitudinal analysis: MTSS tier movement patterns, domain-level score trends, growth toward goals, subgroup disaggregation (race/ethnicity, gender, grade, EL, foster youth, SES). Multilevel longitudinal analytic framework (multivariate regression and path analysis) testing theory of change. Dosage analysis examining whether higher-intensity service receipt produces measurably different outcomes. Effect sizes, confidence intervals, practical significance.	02/01/28 to 03/31/28
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1	Activity 6.3: (e-f) Describe performance management approach and document common challenges and solutions <i>(DBG lead; SCCOE support — Pilar Vazquez-Vialva/project input, Marie Busque & Tenee Brown/subject matter expertise, Jessica Simpson/policy, Irina Shacter/HIPAA/FERPA, Adriana Huerta/CYBHI billing; IMPACTER support; Breaking Barriers support; ASR support).</i> Comprehensive description of performance management approach for replication: implementation science framework, TTA model, technology platform architecture, training curricula, learning collaborative model, complete timeline with logic model. Synthesize implementation challenges and solutions from quarterly summaries, coaching logs, fidelity data, school feedback — organized by category (adoption, technical, staffing, sustainability, coordination). For each challenge: context, solution, outcome, implications for future scale. SCCOE and Breaking Barriers contribute policy and compliance analysis — documenting how LEAs navigated HIPAA/FERPA, Medi-Cal billing, and cross-system integration challenges.	03/01/28 to 04/06/28
Deliverable 7: Student Behavioral Health: Performance Management Training Guide		Due: April 6, 2028
Deliverable	Requirement	
	Please describe your approach to create school behavioral health performance management training guide targeted to schools providing behavioral health services, outlining best practices and learnings for the efforts and deliverables outlined in this RFP. These training guide should incorporate best practices,	

	lessons learned, templates for data collection and reporting, and references to relevant external resources.	
Requirement	<i>Describe the steps, activities, or milestones that will be completed to fulfill the deliverable and a general timeline for their completion.</i>	<i>Start Date and End Date (mm/dd/yy to mm/dd/yy)</i>
1	Activity 7.1: Finalize Performance Management Training Guide outline and chapter structure incorporating best practices, lessons learned, and templates <i>(DBG lead; SCCOE support — Pilar Vazquez-Vialva/project oversight, Marie Busque & Tenee Brown/subject matter expertise, Jaime Koo/community of practice input; Corrine Frese/training input; IMPACTER support; Breaking Barriers support).</i> Cross-team working group designs framework based on 12+ months of TTA delivery, quarterly collaboratives, and implementation data from 18 sites. Target audience: school administrators, counselors, wellness coordinators, district behavioral health leads. Chapter structure: (1) Introduction to School BHPM, (2) Building Readiness — Assessing Current Data Practices, (3) Selecting and Implementing a Screening Platform, (4) Using Data for Goal-Setting and Progress Monitoring, (5) Connecting Data to MTSS and Student Services, (6) Building Stakeholder Buy-In, (7) Sustainability and Funding Pathways, (8) Quality Improvement and Continuous Learning, (9) Templates, Tools, and Resources. Circulate outline to participating LEAs.	10/01/27 to 12/31/27
1	Activity 7.2: Author technology, data, and measurement chapters (2-5) with templates for data collection and reporting	01/01/28 to 03/15/28

	<i>(IMPACTER lead; SCCOE support — Lee Andersen/technology, Irina Shacter/data governance checklist, Research Analyst/data collection and reporting input, Marie Busque & Tenée Brown/walkthrough and MTSS input; Stanford support; ASR support).</i> Step-by-step readiness assessment guide (reproducible template); screening platform selection and configuration using this project as case study — comparing open-language spoken-response screeners vs. Likert-scale instruments, student-level SIS-synced data vs. anonymized aggregate surveys, SIS integration through Clever SSO; administration protocols and best practices; dashboard interpretation guide with annotated screenshots for each role-based view; data use protocols for walkthroughs and MTSS referrals; goal-setting worksheets; SIS integration guidance; data governance checklists (FERPA, HIPAA, CA-NDPA). Stanford contributes measurement validation methodology and predictive analytics framework. Reproducible templates: data walkthrough agenda, administration schedule, data sharing MOU, parent notification letter.	
1	Activity 7.3: Author policy, practice, and sustainability chapters (1, 6-8) with references to relevant external resources <i>(DBG and Breaking Barriers lead; SCCOE support — Pilar Vazquez-Vialva/sustainability input; Stephanie Gomez/blending and braiding funding input, Jessica Simpson/policy framework, Adriana Huerta/CYBHI billing guidance, Corrine Frese/coaching input, Jaime Koo/community of practice input).</i>	01/01/28 to 03/15/28

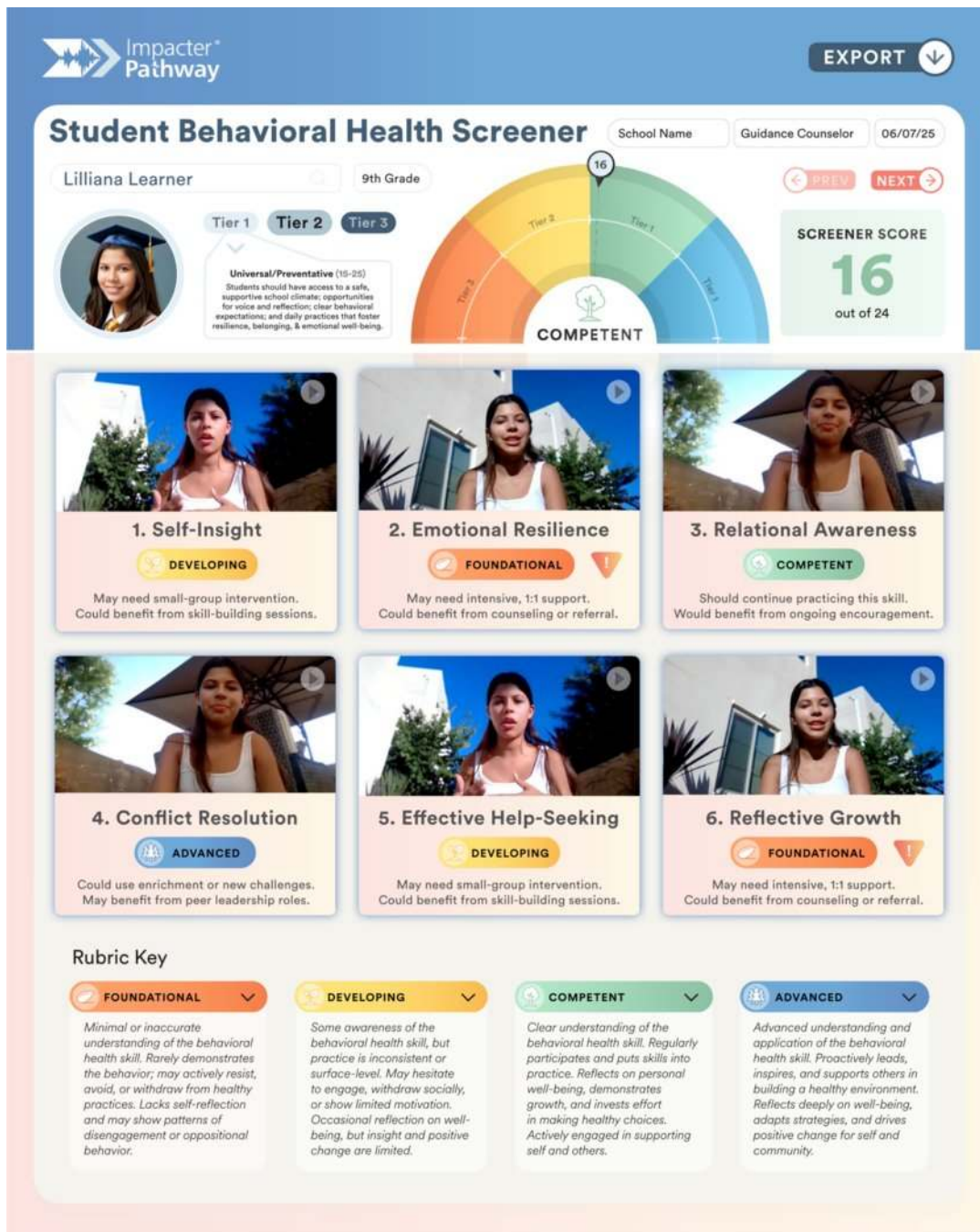
1	Chapter 1 frames BHPM within the California behavioral health landscape (BHSSA, CYBHI). Chapter 6 covers buy-in strategies at three levels (LEA leadership, school administration, educators) — including the project-specific finding that authentic student voice data is consistently more compelling to educators than numerical survey scores as a mindset shift catalyst. Chapter 7 provides practical sustainability guide to braiding/blending funding: CYBHI fee schedule reimbursement (including step-by-step guidance on billing CPT Code 96127 with U4 modifier for behavioral health screening at \$4.81 per administration), special education mental health dollars, LCFF supplemental/concentration grants, Medi-Cal school-based services. Chapter 8 covers quality improvement frameworks, PDSA cycles in practitioner-friendly language, internal coaching capacity, communities of practice design. Activity 7.4: Author evaluation chapter and resource appendix (Chapter 9) with references to relevant external resources <i>(ASR lead; SCCOE support — Pilar Vazquez-Vialva/project input; Research Analyst/evaluation chapter input and resource appendix; IMPACTER support; Stanford support).</i> Define how schools measure their own BHPM effectiveness: recommended success metrics, data collection schedules, progress tracking methods, indicators the system is working (increased completion rates, positive tier movement, educator confidence, reduced time from screening to referral). Stanford contributes evaluation design methodology linking school-level BHPM outcomes to population health indicators. Curate and annotate comprehensive	02/01/28 to 03/31/28
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	list of external resources. Peer review of full Training Guide for accuracy, readability, practical utility.	
1	Activity 7.5: Compile, pilot test, and submit final Training Guide to Commission <i>(SCCOE lead — Deborah Gorgulho/Commission relationship, Pilar Vazquez-Vialva/project management, Marie Busque & Tenée Brown/pilot test, Claudia Rubio/guide compilation; all partners contribute).</i> Compile all chapters. Professional design and formatting for accessibility. Pilot review with 2-3 participating schools — distribute draft to selected administrators and counselors, collect structured feedback on clarity, completeness, and practical utility. Incorporate pilot feedback. Submit completed Training Guide by April 6, 2028.	03/15/28 to 04/06/28

Attachment 5: Sample Student Services and Outcomes Report

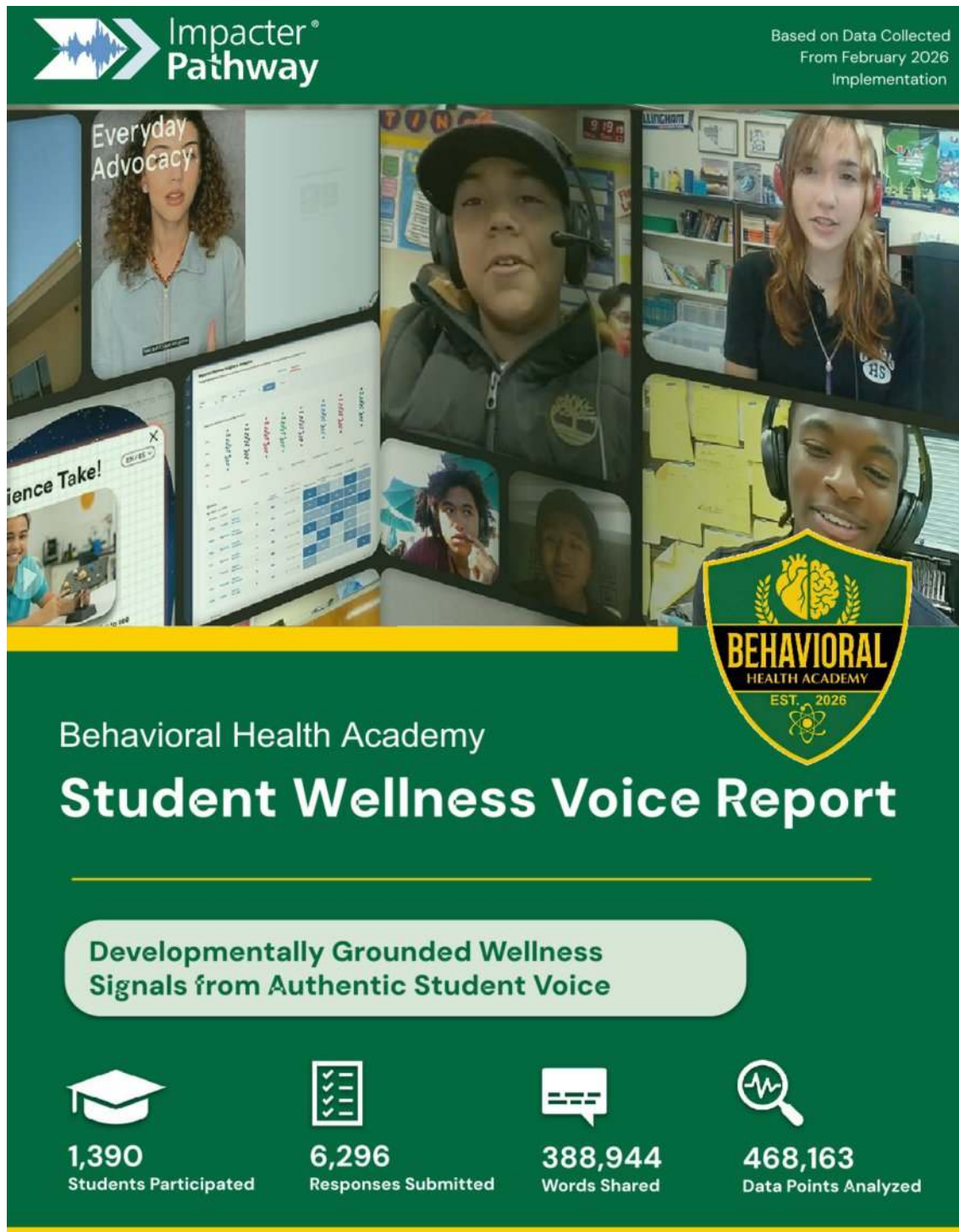
Provide a two-page mockup of an excerpt from a hypothetical school-level Student Services and Outcomes Report, including figures and description of trends for key student outcomes and services.

(LEA Dashboard)



- E. Provide a two-page mockup of an excerpt from a hypothetical school-level Student Services and Outcomes Report, including figures and description of trends for key student outcomes and services.

(COVER)

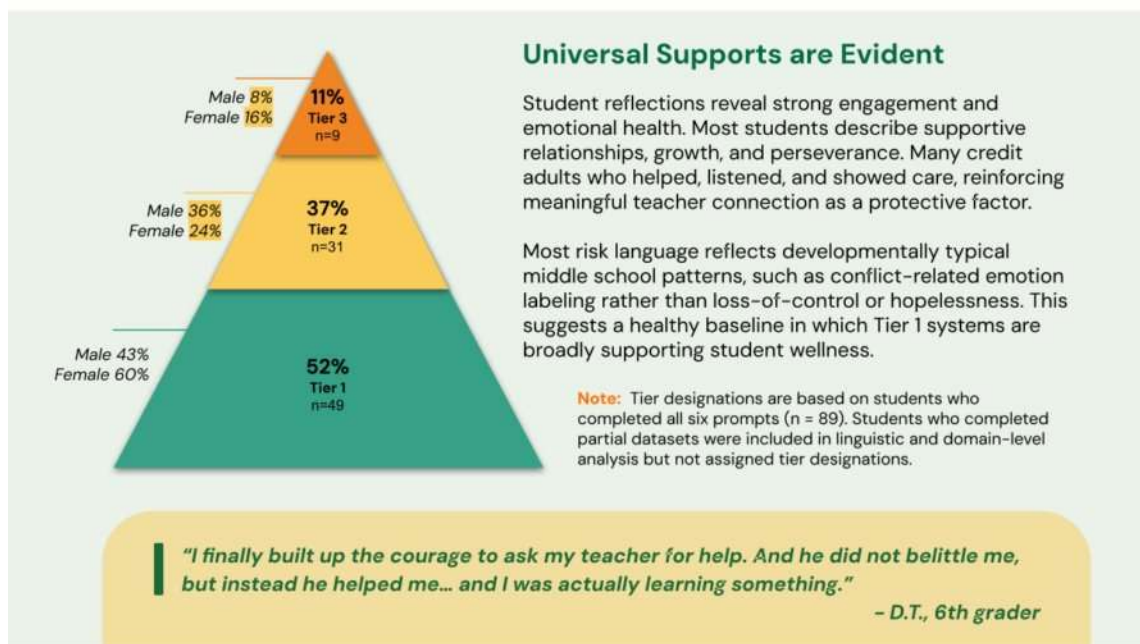


- E. Provide a two-page mockup of an excerpt from a hypothetical school-level Student Services and Outcomes Report, including figures and description of trends for key student outcomes and services.

(Sample Report — Pg. 1)

FROM STUDENT VOICE TO MTSS INSIGHT

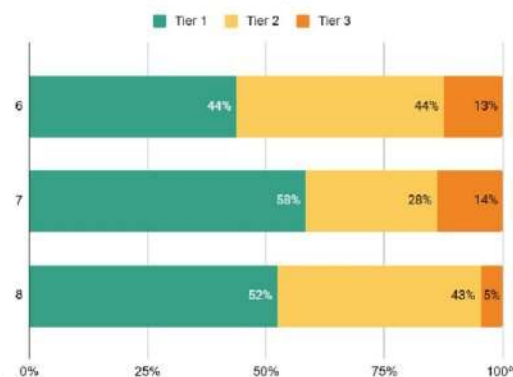
Behavioral Health voice insights provide an additional lens within Allegiance STEAM Academy's MTSS framework. Rather than focusing solely on external conduct, this view incorporates how students describe their internal experiences: how they cope, where they hesitate, and when they begin to withdraw. When examined alongside existing MTSS systems, these patterns offer developmentally grounded indicators to guide universal supports and targeted intervention.



Tier 2 & 3 Insights

- Sixth grade shows the highest combined Tier 2 and Tier 3 prevalence (57% vs. 48% school average), suggesting early middle school as a key developmental leverage point.
- Female students show higher representation in both Tier 1 and Tier 3 categories. Greater emotional specificity and disclosure contribute to increased high-intensity emotional language ("I felt really overwhelmed," "I thought it was my fault").
- Hispanic students show slightly higher Tier 3 prevalence (15% vs. 11% school average). Tier 3 signals are primarily associated with relational stress language rather than internalized distress markers.

Tier Distribution by Grade Level



- E. Provide a two-page mockup of an excerpt from a hypothetical school-level Student Services and Outcomes Report, including figures and description of trends for key student outcomes and services.

(Sample Report Pg. 2)

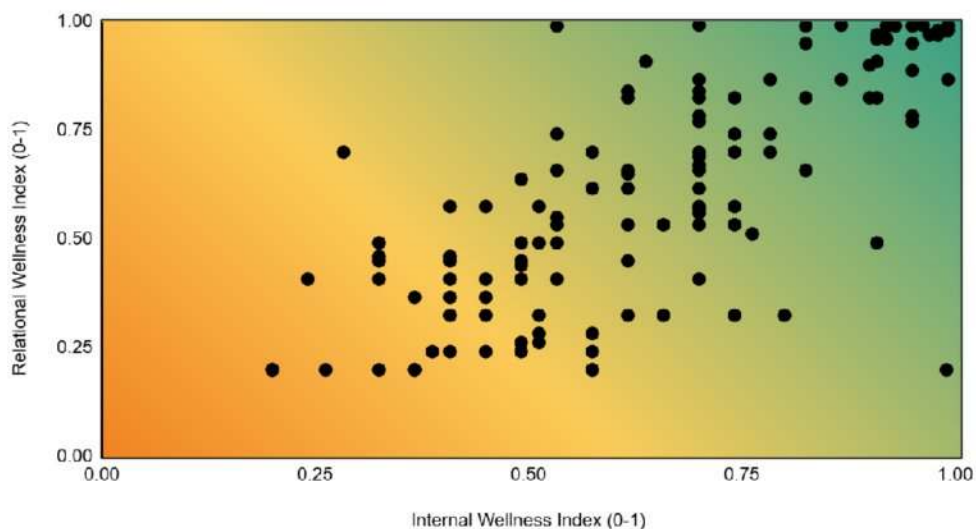
STUDENT WELLNESS CLIMATE PROFILE

This matrix visualizes the emotional architecture of Allegiance STEAM. Each point represents an individual student, positioned by their Internal Wellness Index (self-awareness, reflection, emotional processing) and Relational Wellness Index (connection, belonging, conflict navigation).

Rather than solely summarizing domain averages, this view shows how wellness is distributed across the student body, revealing clusters of strength and contained areas for targeted reinforcement.

Student Wellness Matrix

A majority of students are situated in the "Green Zone," indicating strong behavioral health foundations.



Key Insights

1. A Strong Upper-Right Presence

A substantial cluster of students demonstrate high levels across both indices, indicating integrated reflection and stable relational grounding.

2. Relational Wellness Drives Variation

The wider spread along the Relational Wellness axis suggests that connection and belonging differentiate students more than internal processing alone.

3. Developmental Progression Is Visible

Upper-grade students cluster more heavily in the high-high quadrant, reinforcing the natural strengthening of wellness over time.

4. A Focused Emerging Support Cluster

A small group of students appear lower across both indices, representing a clear and contained opportunity for proactive support.

- E. Provide a two-page mockup of an excerpt from a hypothetical school-level Student Services and Outcomes Report, including figures and description of trends for key student outcomes and services.

(Sample Report — Baseline)

BEHAVIORAL HEALTH INSIGHTS: A STRONG BASELINE FOR GROWTH

Domain-level scoring provides a structured view of student competencies across six Behavioral Health Voice domains. Across Allegiance STEAM, students demonstrate a strong behavioral health baseline. Variation across domains highlights both strengths and clear developmental opportunities.

Average Domain Scores (Scale: 200–800)	
Reflective Growth	539
Emotional Resilience	534
Effective Help-Seeking	501
Conflict Resolution	480
Relational Awareness	466
Self-Insight	455

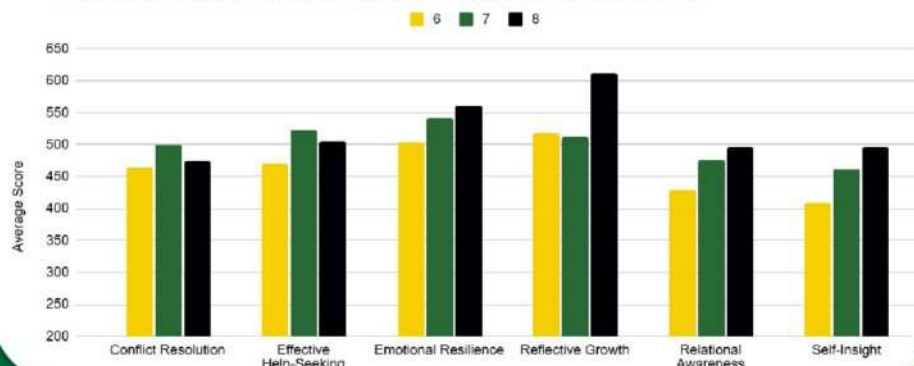
Key Insights

- **Reflective Growth and Emotional Resilience anchor the school's behavioral health baseline.** Students frequently use temporal framing ("I used to... now I...") and adaptive response language ("I tried again," "I talked to...") to make meaning from challenges.
- **Self-Insight represents the most strategic instructional lever.** While students effectively name emotions, fewer identify triggers or internal patterns. Deepening metacognitive reflection presents a clear opportunity for growth.
- **Behavioral health competencies tend to strengthen as students mature.** Eighth graders demonstrate stronger growth framing and emotional regulation language, suggesting natural developmental progression.



Average Behavioral Health Domain Scores by Grade Level

Competencies vary by grade level, but show natural progression as students mature.



"I was like 'It's okay, Mama. I took deep breaths,' and she said 'Good job!' That's something that changed me—me taking deep breaths and forgetting about it." — O.M., 7th grader



- E. Provide a two-page mockup of an excerpt from a hypothetical school-level Student Services and Outcomes Report, including figures and description of trends for key student outcomes and services.

(Sample Report — Equity Insights)

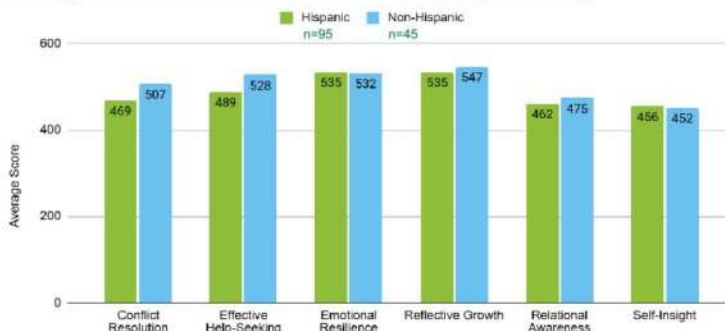
EQUITY INSIGHTS: BEHAVIORAL HEALTH INDICATORS ACROSS STUDENT GROUPS

This Behavioral Health Voice Screener provides a comparative view of how wellness competencies are expressed across demographic groups. The data show strong parity across ethnic groups and meaningful differences by gender, offering insight into how reflective processing and relational competencies vary among students.

EQUITABLE OUTCOMES ACROSS HISPANIC & NON-HISPANIC STUDENTS

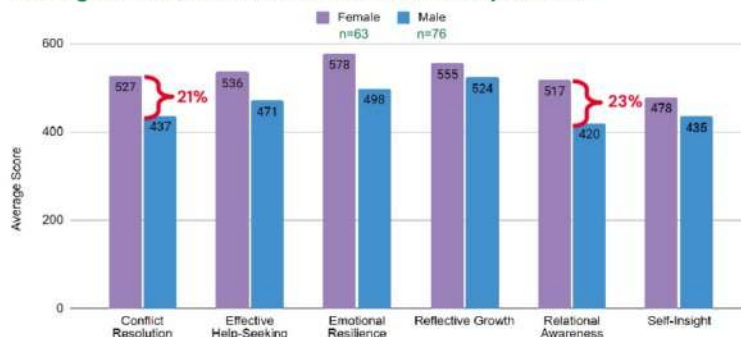
Behavioral Health averages are closely aligned across Hispanic and non-Hispanic students, with differences under 3% across domains. Protective and risk language appear at comparable rates, suggesting minimal systemic disparity in expressive behavioral health indicators.

Average Behavioral Health Domain Scores by Ethnicity



FEMALE STUDENTS LEAD ACROSS ALL DOMAINS

Average Behavioral Health Domain Scores by Gender



Across all six domains, male students' reflections scored 15% lower on average than female students' responses. The largest gaps in *Conflict Resolution* and *Relational Awareness* suggest a focused opportunity to strengthen relational skill development.

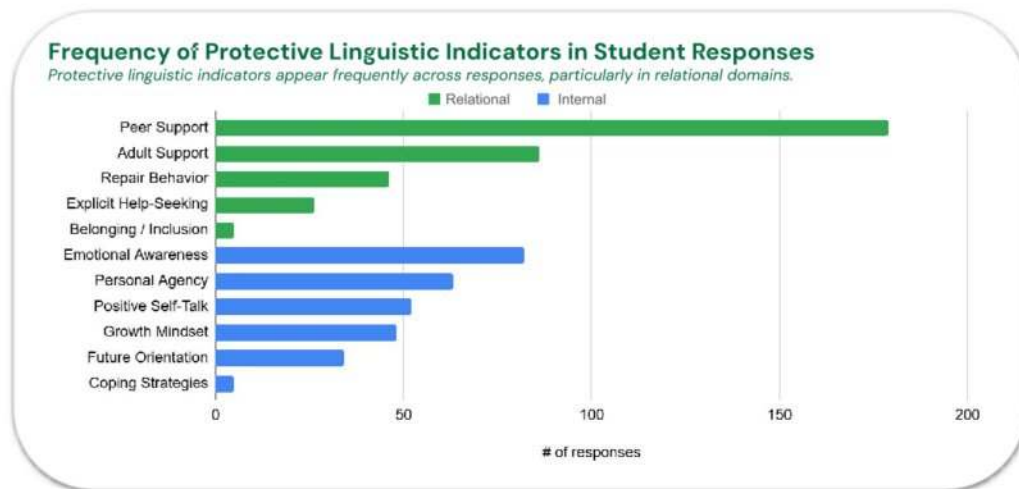
- E. Provide a two-page mockup of an excerpt from a hypothetical school-level Student Services and Outcomes Report, including figures and description of trends for key student outcomes and services.

(Sample Report — Protective Language Patterns)

PROTECTIVE LANGUAGE PATTERNS

In addition to rubric-aligned domain scoring, student responses were analyzed for the presence of protective linguistic markers. Using structured pattern detection aligned to behavioral health constructs, responses were coded for relational and internal protective signals.

This secondary analysis provides a complementary lens to scaled scores, revealing not just how students perform across domains, but how protective capacity is articulated in their own language.



Key Insights

- **Protective language appears at nearly four times the rate of risk language.**
- **Relational protective signals are most prominent (49.1% of responses),** reinforcing connection as a central protective structure.
- **Internal protective language is present but less developed.** Emotional awareness (11.8%) and agency language (9.1%) appear consistently, while explicit coping strategy naming remains limited (0.7%).



- E. Provide a two-page mockup of an excerpt from a hypothetical school-level Student Services and Outcomes Report, including figures and description of trends for key student outcomes and services.

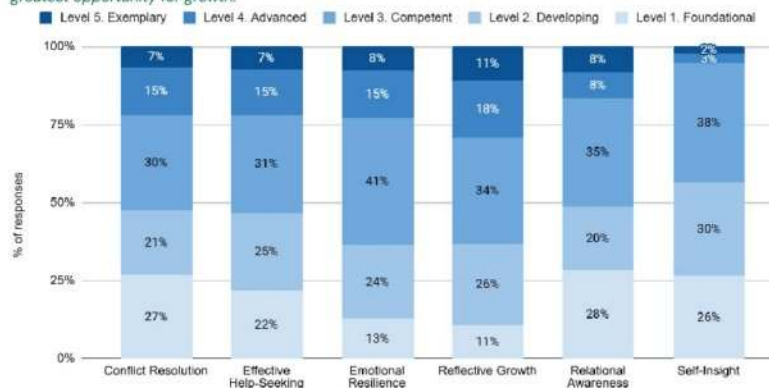
(Sample Report — Scores, Solutions, and Services)

CONCLUSIONS & NEXT STEPS

Allegiance STEAM Academy is demonstrating what it means to center student voice in behavioral health practice. Students are not only participating in the screening process—they are articulating wellness, challenge, growth, and connection in their own words. The volume and depth of reflective language captured in this cycle position the school at the forefront of voice-based wellness measurement. Building on this strong foundation, the following strategies are designed to deepen internal awareness and strengthen developmental transitions across grade levels.

Distribution of Student Scores by Behavioral Health Domain

Most students demonstrate Level 3 (Competent) or higher across domains, with Self-Insight showing the greatest opportunity for growth.



Data-Driven Strategic Recommendations

1. Embed Structured Self-Insight Routines

Integrate brief reflection protocols that ask students to identify emotional triggers, patterns, and alternative responses. Move beyond “what happened” to “why I reacted” and “what I’ll try next.”

2. Strengthen Relational Competencies Among Male Students

Provide explicit modeling and guided practice in conflict navigation, perspective-taking, and repair language, particularly in settings where relational scaffolds may be beneficial.

3. Normalize Help-Seeking in 6th Grade

Use classroom routines to explicitly model when and how to seek support, positioning help-seeking as a strength during this transitional developmental period into middle school.

4. Leverage 8th Grade Reflective Growth as Peer Leadership Opportunity

Create structured opportunities for eighth graders to model growth narratives and adaptive coping strategies, reinforcing strengths while cultivating school-wide behavioral health norms.



ATTACHMENT 6: COST SHEET

No.	Deliverable	Year 1	Year 2
1	Recruitment Outcome Summary	517,280	
2	Indicators, Outcomes, and Metrics Brief	517,280	
3	Training and Technical Assistance (TTA) Plan	517,280	
4	Collaborative Learning Group Plan	517,280	
5	Collaborative Learning Group Summary Y1Q1	342,960	
6	Collaborative Learning Group Summary Y1Q2	342,960	
7	Collaborative Learning Group Summary Y1Q3	342,960	
8	Collaborative Learning Group Summary Y1Q4	342,960	
9	Collaborative Learning Group Summary Y2Q1		433,400
10	Collaborative Learning Group Summary Y2Q2		433,400
11	Collaborative Learning Group Summary Y2Q3		433,400
12	Students Services and Outcome Report Y1Q1	342,960	
13	Students Services and Outcome Report Y1Q2	342,960	
14	Students Services and Outcome Report Y1Q3	342,960	
15	Students Services and Outcome Report Y1Q4	342,957	
16	Students Services and Outcome Report Y2Q1		433,400
17	Students Services and Outcome Report Y2Q2		433,400
18	Students Services and Outcome Report Y2Q3		433,400
19	Student BHPM Training Guide		433,400
20	Final Report		433,403
21	LEA Incentive	360,000	360,000
22	Yearly Total Cost	5,172,797.00	3,827,203.00
23	Total Cost for All Years (Cannot exceed \$9,000,000)		9,000,000.00

Attachment 7: References

REFERENCE #1



RFP BHSSA-Evaluation-002

School Behavioral Health Performance Management System

ATTACHMENT 7: REFERENCES

Reference for: Santa Clara County Office of Education

Organization Name:	East Side Union High School District
Time Period the Reference Covers (Must have been within the last 5 years of the release date of this RFP)	August 2022 – Present
Program or Service Provided: Must be from LEA staff or school administration who have received performance management technical assistance from your organization within the last five (5) years. At Least one (1) reference must be from a school principal or vice-principal.	East Side Union High School District have received technical assistance from the Santa Clara County Office of Education (SCCOE) Youth Health & Wellness Department through the CYBHI Capacity Grant and as active partners in the BHSSA Universal Screening Pilot. SCCOE's support has focused on strengthening their established wellness center operations. SCCOE's partnership has included: • Wellness Center Enhancement Support: Supporting the enhancements of supplemental behavioral health supports within existing ESUHSd wellness centers, aligned to ESUHSd and SCCOE behavioral health goals and schoolwide needs. • CYBHI Capacity Grant Technical Assistance: Support with readiness, implementation planning, and capacity-building aligned to state CYBHI priorities, including guidance on implementation planning, allocation of resources, and alignment with local wellness center goals. • BHSSA Universal Screening Pilot Collaboration: Co-design and facilitation of the pilot activities with ESUHSd as one of SCCOE's district partners, including development of processes, roles, and expectations to integrate universal screening into existing wellness and student support systems.
Reference Contact Name and Title:	Maryam Adalat, Director Student Services
Reference Contact Phone Number:	408-347-5330
Reference Contact E Mail Address:	adalatm@esuhsd.org



Ratings: Summarize Proposer's performance and circle in the column on the right the number which best corresponds to the performance rating for each question. Provide comments related to the rating.

Please follow the rating guidelines below for description of rating scale:

Rating Guidelines and Description of Rating Scale:	
Exceptional (5)	Performance/service provided was significantly above expectations
Very Good (4)	Performance/service was slightly above expectations
Satisfactory (3)	Performance met expectations
Marginal (2)	Performance/service was slightly below expectations
Unsatisfactory	Performance/service provided was significantly below expectations

Category	Comments Provide a comment for the rating	Rating (Circle One)
1. Understood my needs and respected my background and experiences.	The proposer has provided services that are significantly above expectations.	1 2 3 4 <u>5</u>
2. Made me feel understood, supported, and respected while participating.	The proposer is amazing in ensuring that I feel understood and supported while participating.	1 2 3 4 <u>5</u>
3. Helped me create a plan to improve services and outcomes in my organization.	The proposer has worked collaboratively with me to improve outcomes for my district.	1 2 3 <u>4</u> 5
4. Helped me feel empowered to drive change in my organization.	The proposer utilizes a strength based approach and understands my needs; therefore, they are always helping me feel empowered to make change.	1 2 3 4 <u>5</u>



RFP BHSSA-Evaluation-002

School Behavioral Health Performance Management System

5. I was given real responsibility and my decisions mattered.	The proposer has given me plenty of responsibilities and supported my decisions.	1 2 3 4 <u>5</u>
---	--	------------------

A handwritten signature in black ink, consisting of a series of loops and a long horizontal stroke.

3/6/2026

Reference Signature

Date

REFERENCE #2



RFP BHSSA-Evaluation-002

School Behavioral Health Performance Management System

ATTACHMENT 7: REFERENCES

Reference for: Santa Clara County Office of Education

Organization Name:	Sunnyvale Elementary School District
Time Period the Reference Covers (Must have been within the last 5 years of the release date of this RFP)	August 2023 – Present
Program or Service Provided: Must be from LEA staff or school administration who have received performance management technical assistance from your organization within the last five (5) years. At Least one (1) reference must be from a school principal or vice-principal.	Sunnyvale School District has received technical assistance from the Santa Clara County Office of Education (SCCOE) Youth Health & Wellness Department through the CYBHI Capacity Grant and as active partners in the wellness center supported by the BHSSA Round 1 grant. SCCOE's support has focused on the planning and implementation of their wellness center operations and piloting Enhanced Care Management (ECM). SCCOE's partnership with SEDS has included: Wellness Center Enhancement and Implementation Support: SCCOE has provided tailored guidance and coaching to enhance behavioral health support within the wellness centers at Sunnyvale Middle School and Lakewood School. This work has been aligned with both SEDS's and SCCOE's shared behavioral health objectives, as well as the broader needs to strengthen student wellness and access to care. CYBHI Capacity Grant Technical Assistance: Through the CYBHI Capacity Grant, SCCOE has supported SCCOE in readiness activities, implementation planning, and capacity-building aligned with state CYBHI priorities. Assistance has included strategic guidance on implementation design, resource allocation, and ensuring alignment between state priorities and local wellness center goals.



RFP BHSSA-Evaluation-002

School Behavioral Health Performance Management System

Reference Contact Name and Title:	Paul Slayton, Director of Student Support Services
Reference Contact Phone Number:	(408) 522-8200 Extension #: 1071
Reference Contact E Mail Address:	paul.slayton@sesd.org



RFP BHSSA-Evaluation-002
School Behavioral Health Performance Management System

Ratings: Summarize Proposer's performance and circle in the column on the right the number which best corresponds to the performance rating for each question. Provide comments related to the rating.

Please follow the rating guidelines below for description of rating scale:

Rating Guidelines and Description of Rating Scale:	
Exceptional (5)	Performance/service provided was significantly above expectations
Very Good (4)	Performance/service was slightly above expectations
Satisfactory (3)	Performance met expectations
Marginal (2)	Performance/service was slightly below expectations
Unsatisfactory	Performance/service provided was significantly below expectations

Category	Comments Provide a comment for the rating	Rating (Circle One)
1. Understood my needs and respected my background and experiences.	Absolutely have the opportunity to share my own experiences and have them inform how we were going to proceed with the work in the Sunnyvale school District. No concerns, very grateful!	1 2 3 4 <u>5</u>
2. Made me feel understood, supported, and respected while participating.	Certainly felt that I had agency and the ability to influence what I was doing when I was participating.	1 2 3 4 <u>5</u>
3. Helped me create a plan to improve services and outcomes in my organization.	As they work with wellness centers specifically progressed, I regularly had support to adapt what we were using wellness centers to accomplish to more easily meet the goals for the district.	1 2 3 <u>4</u> 5
4. Helped me feel empowered to drive	Absolutely! I never felt that there was a prescribed way to be working for change: I had thought partners with SCCOE and I'm grateful.	1 2 3 4 <u>5</u>



RFP BHSSA-Evaluation-002

School Behavioral Health Performance Management System

change in my organization.		
5. I was given real responsibility and my decisions mattered.	Again could not be more impressed, and more eager to participate in the future. My decisions around implementation were critical, and we had a true partnership.	1 2 3 4 5

Reference Signature

3/6/2026
Date

REFERENCE #3



RFP BHSSA-Evaluation-002

School Behavioral Health Performance Management System

ATTACHMENT 7: REFERENCES

Reference for: Santa Clara County Office of Education

Organization Name:	Luther Burbank Elementary School District – Luther Burbank K-8 Elementary School
Time Period the Reference Covers (Must have been within the last 5 years of the release date of this RFP)	August 2022 – Present
Program or Service Provided: Must be from LEA staff or school administration who have received performance management technical assistance from your organization within the last five (5) years. At Least one (1) reference must be from a school principal or vice-principal.	Luther Burbank School has received technical assistance from the Santa Clara County Office of Education (SCCOE) Youth Health & Wellness Department through the CYBHI Capacity Grant and Community Schools Initiative. Luther Burbank is a CA Community School Partnership awardee from Cohort 1. SCCOE's support has focused on strengthening the planning and implementation of wellness center operations and advancing the school's community school strategies. SCCOE's partnership has included: • Wellness Center Enhancement Support: Guidance to align wellness center services with schoolwide needs and SCCOE behavioral health priorities, including support in developing workflows, strengthening supplemental behavioral health supports, and integrating wellness services into the broader student support structure. • CYBHI Capacity Grant Technical Assistance: Readiness support, implementation planning, and capacity-building aligned to state CYBHI priorities, including assistance with team structures, resource alignment, and integration with existing wellness center goals. • Community Schools Implementation Support: Coaching and consultation to strengthen core Community Schools pillars, particularly around integrated student supports, family engagement, and coordination of services that



RFP BHSSA-Evaluation-002

School Behavioral Health Performance Management System

connect the wellness center to broader whole-child strategies.

Reference Contact Name and Title:

Sheryl Uchiyama, Vice Principal/Learning and Student Services Director

Reference Contact Phone Number:

408-295-1814

Reference Contact E Mail Address:

suchiyama@ldsdk8.org



RFP BHSSA-Evaluation-002

School Behavioral Health Performance Management System

Ratings: Summarize Proposer's performance and circle in the column on the right the number which best corresponds to the performance rating for each question. Provide comments related to the rating.

Please follow the rating guidelines below for description of rating scale:

Rating Guidelines and Description of Rating Scale:	
Exceptional (5)	Performance/service provided was significantly above expectations
Very Good (4)	Performance/service was slightly above expectations
Satisfactory (3)	Performance met expectations
Marginal (2)	Performance/service was slightly below expectations
Unsatisfactory (1)	Performance/service provided was significantly below expectations

Category	Comments Provide a comment for the rating	Rating (Circle One)
1. Understood my needs and respected my background and experiences.	The SCCOE team demonstrated an exceptional level of cultural and organizational competence by deeply immersing themselves in our district's unique ecosystem. Rather than delivering a specified framework, they provided Wellness Center Enhancement Support that was specifically aligned with our unique schoolwide needs and existing student support structures. Their technical assistance for the CYBHI Capacity Grant and Community Schools Implementation was not just a transfer of information; it was a collaborative process that respected our internal team structures and honored our foundational whole-child strategies. By seamlessly integrating state priorities with our local goals, they proved they truly understood our specific challenges and respected the background of our staff and	1 2 3 4 5

	RFP BHSSA-Evaluation-002 School Behavioral Health Performance Management System	
	community, providing a level of service that was significantly above expectations.	
2. Made me feel understood, supported, and respected while participating.	The SCCOE team created an environment of high psychological safety and genuine partnership throughout our collaboration. They didn't just 'consult'—they actively listened to our concerns and integrated our feedback into every phase of the Wellness Center enhancement and Community Schools implementation. We felt consistently supported by their responsiveness and respected as experts in our own local context. Their approach was never prescriptive; instead, they served as thought partners who empowered our team, ensuring that every voice was heard and every decision was collaborative. This level of interpersonal support and professional respect went significantly above our expectations for technical assistance.	1 2 3 4 5
3. Helped me create a plan to improve services and outcomes in my organization.	The SCCOE team was instrumental in moving us from vision to actionable reality. They provided a high level of technical expertise that helped us develop a data-driven plan to improve our student outcomes and service delivery. This roadmap integrated our Wellness Center workflows, CYBHI implementation goals, and Community Schools pillars into one cohesive strategy. Their ability to help us identify clear milestones, align resources, and establish sustainability measures has fundamentally improved our organizational capacity. The resulting plan is also highly practical.	1 2 3 4 5
4. Helped me feel empowered to drive change in my organization.	The SCCOE team's greatest impact was in the confidence and agency they built within our internal leadership. By providing high-level technical assistance and clear implementation frameworks for the Wellness Center and Community Schools models, they didn't just solve	1 2 3 4 5



RFP BHSSA-Evaluation-002

School Behavioral Health Performance Management System

	immediate problems, they equipped us with the tools to sustain and lead these initiatives independently. Their mentorship helped us navigate complex change management within our organization, turning daunting state requirements like the CYBHI priorities into manageable tasks. We now feel fully empowered to champion these behavioral health strategies and drive long-term systemic change, a direct result of their empowering and collaborative approach.	
5. I was given real responsibility and my decisions mattered.	Throughout our partnership, the SCCOE team maintained a perfect balance of providing expert guidance while ensuring that our district remained the primary decision-maker. They consistently created space for our leadership to exercise real responsibility, ensuring that our local insights directly shaped the final outcomes of the Wellness Center enhancement and Community Schools strategy. Our decisions were not only solicited but were treated as an important part of the project. This collaborative dynamic transformed technical assistance into a deep, respectful partnership that significantly exceeded our expectations.	1 2 3 4 5

Reference Signature

3.9.26

Date

REFERENCE #4



RFP BHSSA-Evaluation-002

School Behavioral Health Performance Management System

ATTACHMENT 7: REFERENCES

Reference for: Santa Clara County Office of Education

Organization Name:	Milpitas Unified School District
Time Period the Reference Covers (Must have been within the last 5 years of the release date of this RFP)	August 2023 – Present
Program or Service Provided: Must be from LEA staff or school administration who have received performance management technical assistance from your organization within the last five (5) years. At Least one (1) reference must be from a school principal or vice-principal.	Milpitas Unified School District has received technical assistance from the Santa Clara County Office of Education (SCCOE) Youth Health & Wellness Department through the CYBHI Capacity Grant and as active partners in the wellness center supported by the BHSSA Round 1 grant. SCCOE's support has focused on the planning and implementation of their wellness center operations and piloting Enhanced Care Management (ECM). SCCOE's partnership with MUSD has included: Wellness Center Enhancement and Implementation Support: SCCOE has provided tailored guidance and coaching to enhance behavioral health support within the existing Milpitas High School wellness center. This work has been aligned with both MUSD's and SCCOE's shared behavioral health objectives, as well as the broader schoolwide needs to strengthen student wellness and access to care. CYBHI Capacity Grant Technical Assistance: Through the CYBHI Capacity Grant, SCCOE has supported MUSD in readiness activities, implementation planning, and capacity-building aligned with state CYBHI priorities. Assistance has included strategic guidance on implementation design, resource allocation, and ensuring alignment between state priorities and local wellness center goals. Participation in the SCCOE Capacity Grant Billing Consortium: MUSD is participating in SCCOE's Billing Consortium, which provides support for implementing the DHCS Multipayer Fee Schedule. This work helps districts build long-term sustainability for behavioral health services by



RFP BHSSA-Evaluation-002

School Behavioral Health Performance Management System
expanding billing capacity and diversifying funding
streams.

Reference Contact Name and Title:	Mary Jude Doerpinghaus, Executive Director Inclusive Services for All Learners / Sandra Quintana, Program Manager
Reference Contact Phone Number:	(408) 635-2600
Reference Contact E Mail Address:	mdoerpinghaus@musd.org Squintana@musd.org



Ratings: Summarize Proposer's performance and circle in the column on the right the number which best corresponds to the performance rating for each question. Provide comments related to the rating.

Please follow the rating guidelines below for description of rating scale:

Rating Guidelines and Description of Rating Scale:	
Exceptional (5)	Performance/service provided was significantly above expectations
Very Good (4)	Performance/service was slightly above expectations
Satisfactory (3)	Performance met expectations
Marginal (2)	Performance/service was slightly below expectations
Unsatisfactory	Performance/service provided was significantly below expectations

Category	Comments Provide a comment for the rating	Rating (Circle One)
1. Understood my needs and respected my background and experiences.	Appreciated the authentic collaboration; Listened to better understand our district's needs—in particular our very large high school for wellness support and personalized support through the journey of CYBHI.	1 2 3 4 5
2. Made me feel understood, supported, and respected while participating.	Ensured my/staff's questions were answered—especially ones which our district lacked understanding about. Followed up with concerns in a timely manner.	1 2 3 4 5
3. Helped me create a plan to improve services and outcomes in my organization.	Collaborated extensively to keep us informed of potential changes that might impact our programming, supported transitions of services. This was particularly appreciated during cost management changes.	1 2 3 4 5



RFP BHSSA-Evaluation-002

School Behavioral Health Performance Management System

4. Helped me feel empowered to drive change in my organization.	Supported us through the grant for adding Wellness center at our HS. This has been a literal “life line” for our students struggling with overwhelm, anxiety, depression, suicidal ideations. It has been a pivotal addition to our continuum of student and community support	1 2 3 4 5
5. I was given real responsibility and my decisions mattered.	Decision making was valued and respected.	1 2 3 4 5

Mary Jude Doerpinghaus

Reference Signature

3-10-26

Date

Attachment 8: Bidder Declaration (GSPD-05-105)

State of California—Department of General Services, Procurement Division
GSPD-05-105 (REV 08/09)

Solicitation Number BHSSA-Evaluation

BIDDER DECLARATION

1. Prime bidder information (Review attached Bidder Declaration Instructions prior to completion of this form):

- a. Identify current California certification(s) (MB, SB, NVSA, DVBE): _____ or None ☒ (If "None," go to Item #2)
- b. Will subcontractors be used for this contract? Yes ☒ No ☐ (If yes, indicate the distinct element of work your firm will perform in this contract e.g., list the proposed products produced by your firm, state if your firm owns the transportation vehicles that will deliver the products to the State, identify which solicited services your firm will perform, etc.). Use additional sheets, as necessary.
SCCOE serves as prime contractor providing: project leadership and executive oversight; recruitment and coordination of six LEAs & 18 schools; program management & Commission liaison; fiscal administration of contract including \$720K LEA incentive distribution;
- c. If you are a California certified DVBE: (1) Are you a broker or agent? Yes ☐ No ☒
(2) If the contract includes equipment rental, does your company own at least 51% of the equipment provided in this contract (quantity and value)? Yes ☐ No ☐ N/A ☒

2. If no subcontractors will be used, skip to certification below. Otherwise, list all subcontractors for this contract. (Attach additional pages if necessary):

Subcontractor Name, Contact Person, Phone Number & Fax Number	Subcontractor Address & Email Address	CA Certification (MB, SB, NVSA, DVBE or None)	Work performed or goods provided for this contract	Corresponding % of bid price	Good Standing?	51% Rental?
IMPACTER Education Corporation Joshua Arnold, Co-CEO 949-656-3673	780 Roosevelt #214, Irvine, CA 92620 josh@impacterpathway.com	None	Behavioral health screening platform deployment, SIS integration, training delivery, quarterly outcome reporting, data infrastructure, Training Guide	21%	☒	☐
Deveau Burr Group (DBG) Gina Plate, Principal 619-212-9918	1215 K St. Suite 1820, Sacramento CA 95814 gina@deveauburrgroup.com	None	TTA curriculum design, stakeholder engagement and learning collaborative facilitation, coaching, policy architecture,	20%	☒	☐
University of the Pacific McGeorge School of Law: Breaking Barriers California Elizabeth Estes, JD, Founder 415-806-2312	3200 5th Ave, Sacramento, CA 95817 elizabeth@breakingbarriersca.org	None	Strategic policy advisory, HIPAA/FERPA compliance, Medi-Cal sustainability guidance, Final Report policy analysis, quarterly convening TA	2%	☒	☐

CERTIFICATION: By signing the bid response, I certify under penalty of perjury that the information provided is true and correct.

Page 1 of 2

BIDDER DECLARATION**1. Prime bidder information (Review attached Bidder Declaration Instructions prior to completion of this form):**

- a. Identify current California certification(s) (MB, SB, NVSA, DVBE): _____ or None ☒ (If "None," go to Item #2)
- b. Will subcontractors be used for this contract? Yes ☒ No ☐ (If yes, indicate the distinct element of work your firm will perform in this contract e.g., list the proposed products produced by your firm, state if your firm owns the transportation vehicles that will deliver the products to the State, identify which solicited services your firm will perform, etc.). Use additional sheets, as necessary.
SCCOE serves as prime contractor providing: project leadership and executive oversight; recruitment and coordination of six LEAs & 18 schools; program management & Commission liaison; fiscal administration of contract including \$720K LEA incentive distribution;
- c. If you are a California certified DVBE: (1) Are you a broker or agent? Yes ☐ No ☒
(2) If the contract includes equipment rental, does your company own at least 51% of the equipment provided in this contract (quantity and value)? Yes ☐ No ☐ N/A ☒

2. If no subcontractors will be used, skip to certification below. Otherwise, list all subcontractors for this contract. (Attach additional pages if necessary):

Subcontractor Name, Contact Person, Phone Number & Fax Number	Subcontractor Address & Email Address	CA Certification (MB, SB, NVSA, DVBE or None)	Work performed or goods provided for this contract	Corresponding % of bid price	Good Standing?	51% Rental?
Applied Survey Research (ASR) Lisa Colvig-Niclai, SVP 831-728-1356	55 Penny Lane, Suite 101; Watsonville, CA 95076 lisa@appliedsurveyresearch.org	None	Evaluation framework, literature review, longitudinal analysis, qualitative interviews, Training Guide evaluation chapter, Final Report methodology	4%	☒	☐
					☐	☐
					☐	☐

CERTIFICATION: By signing the bid response, I certify under penalty of perjury that the information provided is true and correct.

Attachment 9: Contractor Certification Clauses (CCC-307)

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FP BHSSA-Evaluation-002
School Behavioral Health Performance Management System

ATTACHMENT 9: CONTRACTOR CERTIFICATION CLAUSES

CCC-307

CERTIFICATION

I, the official named below, CERTIFY UNDER PENALTY OF PERJURY that I am duly authorized to legally bind the prospective Contractor to the clause(s) listed below. This certification is made under the laws of the State of California.

Contractor/Bidder Firm Name (Printed)		Federal ID Number
Santa Clara County Office of Education		77-0272168
By (Authorized Signature)		
Signed by:  AEFFBFA0C5E741B		
Printed Name and Title of Person Signing		
Dr. David M. Toston, Sr. County Superintendent of Schools		
Date Executed	Executed in the County of	
3/6/2026 5:20 PM PST	Santa Clara County	

Initial
DT

1. **STATEMENT OF COMPLIANCE:** Contractor has, unless exempted, complied with the nondiscrimination program requirements. (Gov. Code §12990 (a-f) and CCR, Title 2, Section 8103) (Not applicable to public entities.)
2. **DRUG-FREE WORKPLACE REQUIREMENTS:** Contractor will comply with the requirements of the Drug-Free Workplace Act of 1990 and will provide a drug-free workplace by taking the following actions:
 - a. Publish a statement notifying employees that unlawful manufacture, distribution, dispensation, possession or use of a controlled substance is prohibited and specifying actions to be taken against employees for violations.
 - b. Establish a Drug-Free Awareness Program to inform employees about:
 - 1) The dangers of drug abuse in the workplace;
 - 2) The person's or organization's policy of maintaining a drug-free workplace;
 - 3) Any available counseling, rehabilitation and employee assistance programs; and,
 - 4) Penalties that may be imposed upon employees for drug abuse violations.
 - c. Every employee who works on the proposed Agreement will:

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FP BHSSA-Evaluation-002
School Behavioral Health Performance Management System

- 1) Receive a copy of the company's drug-free workplace policy statement; and,
- 2) Agree to abide by the terms of the company's statement as a condition of employment on the Agreement.

Failure to comply with these requirements may result in suspension of payments under the Agreement or termination of the Agreement or both and Contractor may be ineligible for award of any future State agreements if the department determines that any of the following has occurred: the Contractor has made false certification, or violated the certification by failing to carry out the requirements as noted above. (Gov. Code §8350 et seq.)

3. **NATIONAL LABOR RELATIONS BOARD CERTIFICATION:** Contractor certifies that no more than one (1) final unappealable finding of contempt of court by a Federal court has been issued against Contractor within the immediately preceding two-year period because of Contractor's failure to comply with an order of a Federal court, which orders Contractor to comply with an order of the National Labor Relations Board. (Pub. Contract Code §10296) (Not applicable to public entities.)
4. **CONTRACTS FOR LEGAL SERVICES \$50,000 OR MORE- PRO BONO REQUIREMENT:** Contractor hereby certifies that contractor will comply with the requirements of Section 6072 of the Business and Professions Code, effective January 1, 2003.

Contractor agrees to make a good faith effort to provide a minimum number of hours of pro bono legal services during each year of the contract equal to the lesser of 30 multiplied by the number of full time attorneys in the firm's offices in the State, with the number of hours prorated on an actual day basis for any contract period of less than a full year or 10% of its contract with the State.

Failure to make a good faith effort may be cause for non-renewal of a state contract for legal services, and may be taken into account when determining the award of future contracts with the State for legal services.

5. **EXPATRIATE CORPORATIONS:** Contractor hereby declares that it is not an expatriate corporation or subsidiary of an expatriate corporation within the meaning of Public Contract Code Section 10286 and 10286.1, and is eligible to contract with the State of California.
6. **SWEATFREE CODE OF CONDUCT:**
 - a. All Contractors contracting for the procurement or laundering of apparel, garments or corresponding accessories, or the procurement of equipment, materials, or supplies, other than procurement related to a public works contract, declare under penalty of perjury that no apparel, garments or corresponding accessories, equipment, materials, or supplies furnished to the state pursuant to the contract have been laundered or produced in whole or in part by sweatshop labor, forced labor, convict labor, indentured labor under penal sanction, abusive forms of child labor or exploitation of children in sweatshop labor, or with the benefit of sweatshop labor, forced labor, convict labor, indentured labor under penal sanction, abusive forms of child labor or exploitation of children in sweatshop labor. The contractor further declares under penalty of perjury that they adhere to the Sweatfree Code of Conduct as set forth on the California Department of Industrial Relations website located at www.dir.ca.gov, and Public Contract Code Section 6108.
 - b. The contractor agrees to cooperate fully in providing reasonable access to the contractor's records, documents, agents or employees, or premises if reasonably required by authorized officials of the contracting agency, the Department of Industrial Relations, or the Department

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FP BHSSA-Evaluation-002
School Behavioral Health Performance Management System

of Justice to determine the contractor's compliance with the requirements under paragraph (a).

7. **DOMESTIC PARTNERS:** For contracts over \$100,000 executed or amended after January 1, 2007, the contractor certifies that contractor is in compliance with Public Contract Code section 10295.3.

DOING BUSINESS WITH THE STATE OF CALIFORNIA

The following laws apply to persons or entities doing business with the State of California.

1. **CONFLICT OF INTEREST:** Contractor needs to be aware of the following provisions regarding current or former state employees. If Contractor has any questions on the status of any person rendering services or involved with the Agreement, the awarding agency must be contacted immediately for clarification.

Current State Employees (Pub. Contract Code §10410):

- 1) No officer or employee shall engage in any employment, activity or enterprise from which the officer or employee receives compensation or has a financial interest and which is sponsored or funded by any state agency, unless the employment, activity or enterprise is required as a condition of regular state employment.
- 2) No officer or employee shall contract on his or her own behalf as an independent contractor with any state agency to provide goods or services.

Former State Employees (Pub. Contract Code §10411):

- 1) For the two-year period from the date he or she left state employment, no former state officer or employee may enter into a contract in which he or she engaged in any of the negotiations, transactions, planning, arrangements or any part of the decision-making process relevant to the contract while employed in any capacity by any state agency.
- 2) For the twelve-month period from the date he or she left state employment, no former state officer or employee may enter into a contract with any state agency if he or she was employed by that state agency in a policy-making position in the same general subject area as the proposed contract within the 12-month period prior to his or her leaving state service.

If Contractor violates any provisions of above paragraphs, such action by Contractor shall render this Agreement void. (Pub. Contract Code §10420)

Members of boards and commissions are exempt from this section if they do not receive payment other than payment of each meeting of the board or commission, payment for preparatory time and payment for per diem. (Pub. Contract Code §10430 (e))

2. **LABOR CODE/WORKERS' COMPENSATION:** Contractor needs to be aware of the provisions which require every employer to be insured against liability for Worker's Compensation or to undertake self-insurance in accordance with the provisions, and Contractor affirms to comply with such provisions before commencing the performance of the work of this Agreement. (Labor Code Section 3700)
3. **AMERICANS WITH DISABILITIES ACT:** Contractor assures the State that it complies with the Americans with Disabilities Act (ADA) of 1990, which prohibits discrimination on the basis of

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FP BHSSA-Evaluation-002
School Behavioral Health Performance Management System

disability, as well as all applicable regulations and guidelines issued pursuant to the ADA. (42 U.S.C. 12101 et seq.)

4. **CONTRACTOR NAME CHANGE:** An amendment is required to change the Contractor's name as listed on this Agreement. Upon receipt of legal documentation of the name change the State will process the amendment. Payment of invoices presented with a new name cannot be paid prior to approval of said amendment.
5. **CORPORATE QUALIFICATIONS TO DO BUSINESS IN CALIFORNIA:**
 - a. When agreements are to be performed in the state by corporations, the contracting agencies will be verifying that the contractor is currently qualified to do business in California in order to ensure that all obligations due to the state are fulfilled.
 - b. "Doing business" is defined in R&TC Section 23101 as actively engaging in any transaction for the purpose of financial or pecuniary gain or profit. Although there are some statutory exceptions to taxation, rarely will a corporate contractor performing within the state not be subject to the franchise tax.
 - c. Both domestic and foreign corporations (those incorporated outside of California) must be in good standing in order to be qualified to do business in California. Agencies will determine whether a corporation is in good standing by calling the Office of the Secretary of State.
6. **RESOLUTION:** A county, city, district, or other local public body must provide the State with a copy of a resolution, order, motion, or ordinance of the local governing body which by law has authority to enter into an agreement, authorizing execution of the agreement.
7. **AIR OR WATER POLLUTION VIOLATION:** Under the State laws, the Contractor shall not be: (1) in violation of any order or resolution not subject to review promulgated by the State Air Resources Board or an air pollution control district; (2) subject to cease and desist order not subject to review issued pursuant to Section 13301 of the Water Code for violation of waste discharge requirements or discharge prohibitions; or (3) finally determined to be in violation of provisions of federal law relating to air or water pollution.
8. **PAYEE DATA RECORD FORM STD. 204:** This form must be completed by all contractors that are not another state agency or other governmental entity.
<http://www.documents.dgs.ca.gov/dgs/fmc/pdf/std204.pdf>

Attachment 10: Darfur Contracting Act Certification

NOT APPLICABLE

Santa Clara County Office of Education has not had business activities or operations outside the United States within the previous three years.

Per the form instructions, completion of this form is not required.

Attachment 10: Darfur Contracting Act Certification

Public Contract Code Sections 10475 -10481 applies to any company that currently or within the previous three years has had business activities or other operations outside of the United States. For such a company to bid on or submit a Proposal for a State of California contract, the company must certify that it is either a) not a scrutinized company; or b) a scrutinized company that has been granted permission by the Department of General Services to submit a Proposal.

If your company has not, within the previous three years, had any business activities or other operations outside of the United States, you do **not** need to complete this form.

OPTION #1 - CERTIFICATION

If your company, within the previous three years, has had business activities or other operations outside of the United States, in order to be eligible to submit a bid or Proposal, please insert your company name and Federal ID Number and complete the certification below.

I, the official named below, CERTIFY UNDER PENALTY OF PERJURY that a) the prospective proposer/bidder named below is **not** a scrutinized company per Public Contract Code 10476; and b) I am duly authorized to legally bind the prospective proposer/bidder named below. This certification is made under the laws of the State of California.

<i>Company/Vendor Name (Printed)</i>	<i>Federal ID Number</i>
<i>By (Authorized Signature)</i>	
<i>Printed Name and Title of Person Signing</i>	
<i>Date Executed</i>	<i>Executed in the County and State of</i>

OPTION #2 – WRITTEN PERMISSION FROM DGS

Pursuant to Public Contract Code section 10477(b), the Director of the Department of General Services may permit a scrutinized company, on a case-by-case basis, to bid on or submit a Proposal for a contract with a state agency for goods or services, if it is in the best interests of the state. If you are a scrutinized company that has obtained written permission from the DGS to submit a bid or Proposal, complete the information below.

We are a scrutinized company as defined in Public Contract Code section 10476, but we have received written permission from the Department of General Services to submit a bid or Proposal pursuant to Public Contract Code section 10477(b). A copy of the written permission from DGS is included with our bid or Proposal.

<i>Company/Vendor Name (Printed)</i>	<i>Federal ID Number</i>
<i>Initials of Submitter</i>	
<i>Printed Name and Title of Person Initialing</i>	

Attachment 11: Payee Data Record (STD 204)

STATE OF CALIFORNIA – DEPARTMENT OF FINANCE

Print Form

Reset Form

PAYEE DATA RECORD(Required when receiving payment from the State of California in lieu of IRS W-9 or W-7)
STD 204 (Rev. 03/2021)**Section 1 – Payee Information****NAME** (This is required. Do not leave this line blank. Must match the payee's federal tax return)

SANTA CLARA COUNTY OFFICE OF EDUCATION

BUSINESS NAME, DBA NAME or DISREGARDED SINGLE MEMBER LLC NAME (If different from above)**MAILING ADDRESS** (number, street, apt. or suite no.) (See instructions on Page 2)

1290 RIDDER PARK DRIVE

CITY, STATE, ZIP CODE

SAN JOSE, CA 95131-2304

E-MAIL ADDRESS**Section 2 – Entity Type**

Check one (1) box only that matches the entity type of the Payee listed in Section 1 above. (See instructions on page 2)

☐ **SOLE PROPRIETOR / INDIVIDUAL**☐ **SINGLE MEMBER LLC** Disregarded Entity owned by an individual☐ **PARTNERSHIP**☐ **ESTATE OR TRUST**☐ **CORPORATION** (see instructions on page 2)☐ **MEDICAL** (e.g., dentistry, chiropractic, etc.)☐ **LEGAL** (e.g., attorney services)☒ **EXEMPT** (e.g., nonprofit)☐ **ALL OTHERS****Section 3 – Tax Identification Number**Enter your Tax Identification Number (TIN) in the appropriate box. The TIN must match the name given in Section 1 of this form. Do not provide more than one (1) TIN. The TIN is a 9-digit number. **Note:** Payment will not be processed without a TIN.

- For **Individuals**, enter SSN.
- If you are a **Resident Alien**, and you do not have and are not eligible to get an SSN, enter your ITIN.
- Grantor Trusts (such as a Revocable Living Trust while the grantors are alive) may not have a separate FEIN. Those trusts must enter the individual grantor's SSN.
- For **Sole Proprietor or Single Member LLC (disregarded entity)**, in which the sole member is an individual, enter SSN (ITIN if applicable) or FEIN (FTB prefers SSN).
- For **Single Member LLC (disregarded entity)**, in which the sole member is a business entity, enter the owner entity's FEIN. Do not use the disregarded entity's FEIN.
- For all other entities including LLC that is taxed as a corporation or partnership, estates/trusts (with FEINs), enter the entity's FEIN.

Social Security Number (SSN) or Individual Tax Identification Number (ITIN)

_____ - _____ - _____

OR

Federal Employer Identification Number (FEIN)7 7 - 0 2 7 2 1 6 8**Section 4 – Payee Residency Status** (See instructions)☒ **CALIFORNIA RESIDENT** – Qualified to do business in California or maintains a permanent place of business in California.☐ **CALIFORNIA NONRESIDENT** – Payments to nonresidents for services may be subject to state income tax withholding.☐ No services performed in California☐ Copy of Franchise Tax Board waiver of state withholding is attached.**Section 5 – Certification***I hereby certify under penalty of perjury that the information provided on this document is true and correct. Should my residency status change, I will promptly notify the state agency below.***NAME OF AUTHORIZED PAYEE REPRESENTATIVE**

Deanna Herrera

TITLE

Manager, Accounting Svcs

E-MAIL ADDRESS

dherrera@sccoe.org

SIGNATUREDigitally signed by Deanna Herrera
Date: 2026.03.05 15:12:50 -0800**DATE**

03/05/2026

TELEPHONE (include area code)

(408) 453-6896

Section 6 – Paying State Agency

Please return completed form to:

STATE AGENCY/DEPARTMENT OFFICE**UNIT/SECTION****MAILING ADDRESS****FAX****TELEPHONE** (include area code)**CITY****STATE****ZIP CODE****E-MAIL ADDRESS**

STATE OF CALIFORNIA – DEPARTMENT OF FINANCE

PAYEE DATA RECORD

(Required when receiving payment from the State of California in lieu of IRS W-9 or W-7)
STD 204 (Rev. 03/2021)

GENERAL INSTRUCTIONS

Type or print the information on the Payee Data Record, STD 204 form. Sign, date, and return to the state agency/department office address shown in Section 6. Prompt return of this fully completed form will prevent delays when processing payments.

Information provided in this form will be used by California state agencies/departments to prepare Information Returns (Form 1099).

NOTE: Completion of this form is optional for Government entities, i.e. federal, state, local, and special districts.

A completed Payee Data Record, STD 204 form, is required for all payees (non-governmental entities or individuals) entering into a transaction that may lead to a payment from the state. Each state agency requires a completed, signed, and dated STD 204 on file; therefore, it is possible for you to receive this form from multiple state agencies with which you do business.

Payees who do not wish to complete the STD 204 may elect not to do business with the state. If the payee does not complete the STD 204 and the required payee data is not otherwise provided, payment may be reduced for federal and state backup withholding. Amounts reported on Information Returns (Form 1099) are in accordance with the Internal Revenue Code (IRC) and the California Revenue and Taxation Code (R&TC).

Section 1 – Payee Information

Name – Enter the name that appears on the payee's federal tax return. The name provided shall be the tax liable party and is subject to IRS TIN matching (when applicable).

- Sole Proprietor/Individual/Revocable Trusts – enter the name shown on your federal tax return.
- Single Member Limited Liability Companies (LLCs) that is disregarded as an entity separate from its owner for federal tax purposes - enter the name of the individual or business entity that is tax liable for the business in section 1. Enter the DBA, LLC name, trade, or fictitious name under Business Name.
- Note: for the State of California tax purposes, a Single Member LLC is not disregarded from its owner, even if they may be disregarded at the Federal level.
- Partnerships, Estates/Trusts, or Corporations – enter the entity name as shown on the entity's federal tax return. The name provided in Section 1 must match to the TIN provided in section 3. Enter any DBA, trade, or fictitious business names under Business Name.

Business Name – Enter the business name, DBA name, trade or fictitious name, or disregarded LLC name.

Mailing Address – The mailing address is the address where the payee will receive information returns. Use form STD 205, Payee Data Record Supplement to provide a remittance address if different from the mailing address for information returns, or make subsequent changes to the remittance address.

Section 2 – Entity Type

If the Payee in Section 1 is a(n)...	THEN Select the Box for...
Individual • Sole Proprietorship • Grantor (Revocable Living) Trust disregarded for federal tax purposes	Sole Proprietor/Individual
Limited Liability Company (LLC) owned by an individual and is disregarded for federal tax purposes	Single Member LLC-owned by an individual
Partnerships • Limited Liability Partnerships (LLP) • and, LLC treated as a Partnership	Partnerships
Estate • Trust (other than disregarded Grantor Trust)	Estate or Trust
Corporation that is medical in nature (e.g., medical and healthcare services, physician care, nursery care, dentistry, etc.) • LLC that is to be taxed like a Corporation and is medical in nature	Corporation-Medical
Corporation that is legal in nature (e.g., services of attorneys, arbitrators, notary publics involving legal or law related matters, etc.) • LLC that is to be taxed like a Corporation and is legal in nature	Corporation-Legal
Corporation that qualifies for an Exempt status, including 501(c) 3 and domestic non-profit corporations.	Corporation-Exempt
Corporation that does not meet the qualifications of any of the other corporation types listed above • LLC that is to be taxed as a Corporation and does not meet any of the other corporation types listed above	Corporation-All Other

Section 3 – Tax Identification Number

The State of California requires that all parties entering into business transactions that may lead to payment(s) from the state provide their Taxpayer Identification Number (TIN). The TIN is required by R&TC sections 18646 and 18661 to facilitate tax compliance enforcement activities and preparation of Form 1099 and other information returns as required by the IRC section 6109(a) and R&TC section 18662 and its regulations.

Section 4 – Payee Residency Status**Are you a California resident or nonresident?**

- A corporation will be defined as a "resident" if it has a permanent place of business in California or is qualified through the Secretary of State to do business in California.
- A partnership is considered a resident partnership if it has a permanent place of business in California.
- An estate is a resident if the decedent was a California resident at time of death.
- A trust is a resident if at least one trustee is a California resident.
 - For individuals and sole proprietors, the term "resident" includes every individual who is in California for other than a temporary or transitory purpose and any individual domiciled in California who is absent for a temporary or transitory purpose. Generally, an individual who comes to California for a purpose that will extend over a long or indefinite period will be considered a resident. However, an individual who comes to perform a particular contract of short duration will be considered a nonresident.

For information on Nonresident Withholding, contact the Franchise Tax Board at the numbers listed below:

Withholding Services and Compliance Section: 1-888-792-4900

E-mail address: wscs.gen@ftb.ca.gov

For hearing impaired with TDD, call: 1-800-822-6268

Website: www.ftb.ca.gov

Section 5 – Certification

Provide the name, title, email address, signature, and telephone number of individual completing this form and date completed. In the event that a SSN or ITIN is provided, the individual identified as the tax liable party must certify the form. Note: the signer may differ from the tax liable party in this situation if the signer can provide a power of attorney documented for the individual.

Section 6 – Paying State Agency

This section must be completed by the state agency/department requesting the STD 204.

Privacy Statement

Section 7(b) of the Privacy Act of 1974 (Public Law 93-579) requires that any federal, state, or local governmental agency, which requests an individual to disclose their social security account number, shall inform that individual whether that disclosure is mandatory or voluntary, by which statutory or other authority such number is solicited, and what uses will be made of it. It is mandatory to furnish the information requested. Federal law requires that payment for which the requested information is not provided is subject to federal backup withholding and state law imposes noncompliance penalties of up to \$20,000. You have the right to access records containing your personal information, such as your SSN. To exercise that right, please contact the business services unit or the accounts payable unit of the state agency(ies) with which you transact that business.

All questions should be referred to the requesting state agency listed on the bottom front of this form.

Attachment 12: Final Submission Checklist

A responsive Proposal shall consist of all the required items identified below. Complete this checklist by marking the box with an “X” for each item you are submitting to the Commission

Check	DESCRIPTION
X	Attachment 1: Proposal Cover Sheet
X	Attachment 2: Minimum Qualifications
X	Attachment 2-1: References (Minimum Qualifications)
X	Attachment 3: Proposer Background
X	Attachment 4: Proposed Workplan
X	Attachment 5: Sample Students Services and Outcome Report
X	Attachment 6: Cost Sheet
X	Attachment 7: References
X	Attachment 8: Bidder Declaration (GSPD-05-105)
X	Attachment 9: Contractor Certification Clauses (CCC-307)
X	Attachment 10: Darfur Contracting Act Certification (if applicable)
X	Attachment 11: Payee Data Record (STD 204)
X	Attachment 12: Final Submission Checklist
X	Exhibit A (“D” In RFP): Budget and Narrative

EXHIBIT A (“D” IN RFP): Budget and Narrative**Sheet 1: Salary Detail — Year 1 (May 1, 2026 – June 30, 2027)**

STATE OF CALIFORNIA — BEHAVIORAL HEALTH SERVICES OVERSIGHT AND ACCOUNTABILITY COMMISSION					
DOCUMENT B					
BUDGET DETAIL TEMPLATE					
AGREEMENT #: NAME: BHSSA School Behavioral Health Performance Management System FISCAL YEAR: May 1, 2026 - June 30, 2027					
CATEGORY & LINE ITEM DESCRIPTIONS	FULL BASE SALARY	FULL FRINGE BENEFITS	SALARY & BENEFITS COMBINED	% OF TIME	ANNUAL PROJECT SALARY
Personnel (Salaries & Benefits)					
Project Director Dr. Deborah Gorgulho - Asst Supt ILID .10	\$ 304,300.00	\$ 90,468.00	\$ 394,768.00	10.00%	\$ 39,477.00
Program Coordinator - Dr. Pilar Vazquez-Vialva - Dir IV YHW .50	\$ 240,048.00	\$ 77,598.00	\$ 317,646.00	50.00%	\$ 158,823.00
Program Specialist Lead - BH (Marie Busque) .60	\$ 185,625.00	\$ 65,926.00	\$ 251,551.00	60.00%	\$ 150,931.00
Program Specialist Co-Lead - BH (Tenee Brown) .50	\$ 176,037.00	\$ 63,753.00	\$ 239,790.00	50.00%	\$ 119,895.00
Community Liaison / Family Engagement (Jaime Koo) .30	\$ 185,625.00	\$ 52,547.00	\$ 238,172.00	30.00%	\$ 71,452.00
CYBHI BH Systems & Billing Specialist (Adriana Huerta) .40	\$ 175,640.00	\$ 83,781.00	\$ 259,421.00	40.00%	\$ 103,768.00
LEA Engagement Coordinator (Krisan Meyer) .30	\$ 196,045.00	\$ 68,080.00	\$ 264,125.00	30.00%	\$ 79,238.00

Program Associate - Training & TA Support (Corrine Frese) .30	\$ 215,785.00	\$ 72,351.00	\$ 288,136.00	30.00%	\$ 86,441.00
Data Privacy & Compliance Coordinator (Irina Schacter) .30	\$ 212,777.00	\$ 98,734.00	\$ 311,511.00	30.00%	\$ 93,453.00
IT/Systems Integration Coordinator (Lee Anderson) .25	\$ 215,785.00	\$ 99,017.00	\$ 314,802.00	25.00%	\$ 78,701.00
Research Analyst - Data & Accountability (R&E) 0.30	\$ 144,061.00	\$ 63,582.00	\$ 207,643.00	30.00%	\$ 62,293.00
Chief Business Officer (Stephanie Gomez) .10	\$ 301,800.00	\$ 122,938.00	\$ 424,738.00	10.00%	\$ 42,474.00
Policy, Regulations & Systems Procedures (Jessica Simpson) .25	\$ 224,611.00	\$ 74,258.00	\$ 298,869.00	25.00%	\$ 74,717.00
Administrative Support Specialist (Claudia Rubio) .16	\$ 137,252.00	\$ 37,687.00	\$ 174,939.00	16.00%	\$ 27,990.00
Subtotal Personnel (Salaries & Benefits)					\$ 1,189,653.00
Program Expenses					
Training materials and curriculum development					\$ 25,000.00
LEA Incentive (\$120K x 6 LEAs Y1) - 50% Year One					\$ 360,000.00
Meeting and convening expenses (venues, AV, catering)					\$ 15,000.00
Communications and stakeholder engagement materials					\$ 10,000.00
Translation and interpretation services					\$ 5,000.00
Printing and reproduction					\$ 5,000.00
Data governance and privacy compliance materials					\$ 5,000.00

Subtotal Program Expenses					\$ 425,000.00
Subcontractors					
IMPACTER Education Corporation					\$ 1,300,000.00
Deveau Burr Group (DBG)					\$ 1,000,000.00
Breaking Barriers California (Elizabeth Estes, JD)					\$ 72,000.00
Applied Survey Research (ASR)					\$ 200,000.00
Subtotal Subcontractors					\$ 2,572,000.00
Operating Expenses					
Staff travel - site visits, LEA meetings, training delivery					\$ 120,000.00
Travel - learning collaborative venues and logistics					\$ 80,000.00
Technology licenses (project mgmt, teleconferencing, cloud)					\$ 45,000.00
Data security and privacy compliance infrastructure					\$ 40,000.00
Professional development and conference attendance					\$ 25,000.00
Supplies, office materials, and equipment					\$ 20,000.00
Postage, shipping, and distribution					\$ 10,000.00
Liability and professional insurance					\$ 25,000.00
Communications infrastructure, stakeholder outreach, and project coordination					\$ 390,805.00
Subtotal Operating Expenses					\$ 755,805.00

Subtotal Direct Cost					\$ 4,942,458.00
Administration Expenses*					\$ 230,339.00
GRAND TOTALS					\$ 5,172,797.00
*Administration Expenses may not exceed 15% of the total contract					

Sheet 2: Salary Detail — Year 2 (July 1, 2027 – June 30, 2028)

STATE OF CALIFORNIA — BEHAVIORAL HEALTH SERVICES OVERSIGHT AND ACCOUNTABILITY COMMISSION					
DOCUMENT B					
BUDGET DETAIL TEMPLATE					
AGREEMENT #: NAME: BHSSA School Behavioral Health Performance Management System FISCAL YEAR: July 1, 2027 - June 30, 2028					
CATEGORY & LINE ITEM DESCRIPTIONS	FULL BASE SALARY	FULL FRINGE BENEFITS	SALARY & BENEFITS COMBINED	% OF TIME	ANNUAL PROJECT SALARY
Personnel (Salaries & Benefits)					
Project Director Dr. Deborah Gorgulho - Asst Supt ILID .10	\$ 307,280.00	\$ 91,113.00	\$ 398,393.00	10.00%	\$ 39,839.00
Program Coordinator - Dr. Pilar Vazquez-Vialva - Dir IV YHW .50	\$ 242,439.00	\$ 78,114.00	\$ 320,553.00	50.00%	\$ 160,277.00
Program Specialist Lead - BH (Marie Busque) .60	\$ 187,476.00	\$ 66,325.00	\$ 253,801.00	60.00%	\$ 152,281.00
Program Specialist Co-Lead - BH (Tenee Brown) .50	\$ 177,788.00	\$ 64,131.00	\$ 241,919.00	50.00%	\$ 120,960.00
Community Liaison / Family Engagement (Jaime Koo) .30	\$ 187,476.00	\$ 52,946.00	\$ 240,422.00	30.00%	\$ 72,127.00
CYBHI BH Systems & Billing Specialist (Adriana Huerta) .40	\$ 177,387.00	\$ 85,276.00	\$ 262,663.00	40.00%	\$ 105,065.00
LEA Engagement Coordinator (Krisan Meyer) .30	\$ 197,996.00	\$ 68,502.00	\$ 266,498.00	30.00%	\$ 79,949.00
Program Associate - Training & TA Support (Corrine Frese) .30	\$ 217,933.00	\$ 72,815.00	\$ 290,748.00	30.00%	\$ 87,224.00

Data Privacy & Compliance Coordinator (Irina Schacter) .30	\$ 214,900.00	\$ 100,420.00	\$ 315,320.00	30.00%	\$ 94,596.00
IT/Systems Integration Coordinator (Lee Anderson) .25	\$ 217,933.00	\$ 100,723.00	\$ 318,656.00	25.00%	\$ 79,664.00
Research Analyst - Data & Accountability (R&E) 0.30	\$ 145,502.00	\$ 64,816.00	\$ 210,318.00	30.00%	\$ 63,095.00
Chief Business Officer (Stephanie Gomez) .10	\$ 304,755.00	\$ 125,284.00	\$ 430,039.00	10.00%	\$ 43,004.00
Policy, Regulations & Systems Procedures (Jessica Simpson) .25	\$ 226,848.00	\$ 74,743.00	\$ 301,591.00	25.00%	\$ 75,398.00
Administrative Support Specialist (Claudia Rubio) .16	\$ 138,615.00	\$ 74,835.00	\$ 213,450.00	16.00%	\$ 34,152.00
Subtotal Personnel (Salaries & Benefits)					\$ 1,207,631.00
Program Expenses					
Training materials and refresher guides					\$ 6,000.00
Meeting and convening expenses (venues, AV, catering)					\$ 8,000.00
Training Guide design, formatting, professional production					\$ 8,000.00
Communications and stakeholder engagement materials					\$ 4,000.00
Translation and interpretation services					\$ 2,000.00
Printing and reproduction (Training Guide, Final Report)					\$ 2,000.00
Subtotal Program Expenses					\$ 30,000.00

Subcontractors					
IMPACTER Education Corporation					\$ 600,000.00
Deveau Burr Group (DBG)					\$ 800,000.00
Breaking Barriers California (Elizabeth Estes, JD)					\$ 128,000.00
Applied Survey Research (ASR)					\$ 150,000.00
Subtotal Subcontractors					\$ 1,678,000.00
Operating Expenses					
Staff travel - site visits, learning collaboratives, Final Report					\$ 80,000.00
LEA Incentive (\$120K x 6 LEAs Y2) - 50% Year 2					\$ 360,000.00
Technology licenses (project mgmt, teleconferencing)					\$ 35,000.00
Data security and privacy compliance (ongoing)					\$ 30,000.00
Training Guide pilot distribution and feedback collection					\$ 25,000.00
Final Report production and distribution					\$ 25,000.00
Professional development and conference attendance					\$ 20,000.00
Postage, shipping, and distribution					\$ 10,000.00
Liability, professional insurance, and project coordination					\$ 138,812.00
Subtotal Operating Expenses					\$ 723,812.00
Subtotal Direct Cost					\$ 3,639,443.00

Administration Expenses*					\$ 187,760.00
GRAND TOTALS					\$ 3,827,203.00
*Administration Expenses may not exceed 15% of the total contract					

Sheet 3: Narrative Budget — Year 1 (May 1, 2026 – June 30, 2027)

STATE OF CALIFORNIA — BEHAVIORAL HEALTH SERVICES OVERSIGHT AND ACCOUNTABILITY COMMISSION		
DOCUMENT B		
NARRATIVE BUDGET TEMPLATE		
AGREEMENT #: NAME: BHSSA School Behavioral Health Performance Management System FISCAL YEAR: May 1, 2026 - June 30, 2027		
CATEGORY & LINE ITEM DESCRIPTIONS	BUDGET NARRATIVE — Provide a description of each line item.	ANNUAL PROJECT SALARY
Personnel (Salaries & Benefits)		
Project Director Dr. Deborah Gorgulho .10	Provides strategic leadership and executive oversight for all project activities. Leads LEA recruitment, manages Commission relationship, and ensures alignment of project deliverables with BHSSA goals. Chairs quarterly project steering committee meetings.	\$ 39,477.00
Program Coordinator - Dr. Pilar Vazquez-Vialva .50	Serves as day-to-day project manager. Coordinates across all subcontractors (IMPACTER, DBG, Breaking Barriers, ASR), manages deliverable timelines, schedules LEA engagements, prepares Commission progress reports, and ensures cross-deliverable dependencies are tracked.	\$ 158,823.00
Program Specialist Lead - BH (Marie Busque) .60	Leads behavioral health content development. Reviews and validates screening platform domain mappings, supports crosswalk consultations with LEAs, provides subject matter expertise on MTSS frameworks, and contributes to TTA curriculum design.	\$ 150,931.00
Program Specialist Co-Lead - BH (Tenee Brown) .50	Co-leads behavioral health content development. Reviews and validates screening platform domain mappings, supports crosswalk consultations with LEAs, provides SME on MTSS frameworks, and contributes to TTA curriculum.	\$ 119,895.00

Community Liaison (Jaime Koo) .30	Primary liaison between project and school communities. Supports stakeholder engagement, coordinates parent/family communication, ensures culturally responsive implementation across diverse LEA contexts.	\$ 71,452.00
CYBHI BH Billing Specialist (Adriana Huerta) .40	SME on CYBHI fee schedule implementation, Medi-Cal billing, and BH service delivery models. Supports LEAs on CYBHI reimbursement pathways (CPT 96127, U4 modifier). Contributes to sustainability planning.	\$ 103,768.00
LEA Engagement Coordinator (Krisan Meyer) .30	Manages day-to-day relationships with six LEA teams. Schedules/coordinates site visits, training sessions, data review meetings. First point of contact for LEA operational questions.	\$ 79,238.00
Program Associate - TA (Corrine Frese) .30	Supports TTA delivery logistics: scheduling trainings, preparing materials, coordinating refresher sessions, managing office hours, tracking educator participation, documenting coaching outcomes.	\$ 86,441.00
Data Privacy Coordinator (Irina Schacter) .30	Oversees data governance compliance across 18 sites (FERPA, HIPAA, CA-NDPA). Manages data sharing agreements, monitors privacy protocols, coordinates with IMPACTER on data security standards.	\$ 93,453.00
IT/Systems Integration (Lee Anderson) .25	Technical coordination for SIS integration between IMPACTER platform and each LEA SIS (Aeries, PowerSchool, Infinite Campus). Supports Clever SSO provisioning and troubleshoots integration issues.	\$ 78,701.00
Research Analyst - R&E 0.30	Manages data quality monitoring across all 18 sites, supports quarterly outcome report production, coordinates data review sessions with LEA teams, ensures data governance compliance.	\$ 62,293.00
CBO (Stephanie Gomez) .10	Executive fiscal oversight for the \$9M contract including subcontractor payment processing, budget monitoring, audit preparation, and compliance with state fiscal requirements.	\$ 42,474.00
Policy/Regs/Systems (Jessica Simpson) .25	Supports the development and implementation of project-related processes and policies, ensuring alignment with Education Code requirements and SCCOE regulations.	\$ 74,717.00

Admin Support (Claudia Rubio) .16	Comprehensive administrative support including scheduling, correspondence, document management, travel coordination, procurement, and meeting logistics.	\$ 27,990.00
Subtotal Personnel (Salaries & Benefits)		\$ 1,189,653.00
Program Expenses		
Training materials	Printed training materials, data walkthrough guides, screener administration protocols, dashboard interpretation guides, LEA-specific reference materials for training at all 18 sites.	\$ 25,000.00
LEA Incentive	\$120,000 per LEA x 6 LEAs (\$720,000 total, 50% distributed Y1). Pass-through funds supporting dedicated LEA staff time for training, data review, and collaborative learning.	\$ 360,000.00
Meeting/convening expenses	Venue rental, AV, catering for Y1 in-person learning collaboratives and cross-LEA convenings.	\$ 15,000.00
Communications materials	Stakeholder engagement materials, project overview briefs, LEA information packets, community notification materials.	\$ 10,000.00
Translation/interpretation	Professional translation and interpretation for multilingual stakeholder engagement and parent communications.	\$ 5,000.00
Printing and reproduction	Printing for recruitment materials, participation agreements, data governance documents, Commission deliverables.	\$ 5,000.00
Data governance materials	CA-NDPA agreement templates, FERPA/HIPAA compliance checklists, data sharing MOUs.	\$ 5,000.00
Subtotal Program Expenses		\$ 425,000.00
Subcontractors		
IMPACTER Education Corporation	\$1,300,000 Y1: Platform deployment across 18 sites: site licensing, dashboard customization, SIS integration, ML scoring pipeline, Clever SSO, CA-NDPA	\$ 1,300,000.00

	agreements, readiness assessments, training delivery, crosswalk consultations, data infrastructure. Already built/validated with 200K+ monthly users. Reimbursable under CYBHI at \$4.81/admin (CPT 96127, U4).	
Deveau Burr Group (DBG)	\$1,000,000 Y1: TTA curriculum design (NIRN/Fixsen/PDSA), stakeholder engagement facilitation (12+ LEA sessions), BHPM workshops, training at 18 sites, learning collaborative framework/facilitation Q1-Q3, quarterly summaries, coaching, metrics alignment.	\$ 1,000,000.00
Breaking Barriers California	\$72,000 Y1: Strategic advisory on cross-system policy, HIPAA/FERPA governance protocols, Medi-Cal billing guidance, TA at Q1-Q3 quarterly convenings on legal/compliance dimensions.	\$ 72,000.00
Applied Survey Research (ASR)	\$200,000 Y1: Evaluation framework development, baseline methodology for Recruitment Summary, co-leadership of literature review, evaluation data review for quarterly reports.	\$ 200,000.00
Subtotal Subcontractors		\$ 2,572,000.00
Operating Expenses		
Staff travel	Mileage, lodging, per diem for SCCOE staff site visits at 18 schools, LEA leadership meetings, on-site training/coaching.	\$ 120,000.00
Collaborative travel/logistics	Travel and logistics for Y1 in-person learning collaborative sessions and cross-LEA convenings.	\$ 80,000.00
Technology licenses	Project management, teleconferencing (Zoom/Teams), cloud storage, collaboration tools.	\$ 45,000.00
Data security infrastructure	Encrypted storage, secure file transfer, penetration testing, privacy compliance monitoring for student data across 18 sites.	\$ 40,000.00
Professional development	Conference registration/travel (Breaking Barriers Symposium, CYBHI convenings, PBIS conferences).	\$ 25,000.00
Supplies/equipment	General office supplies, materials, equipment supporting project operations.	\$ 20,000.00

Postage/shipping	Distributing materials, reports, deliverables to LEAs, schools, Commission.	\$ 10,000.00
Insurance	Project-specific liability and professional insurance for Y1 activities.	\$ 25,000.00
Project coordination/communications	Communications platforms, website hosting, project portal, stakeholder outreach infrastructure.	\$ 390,805.00
Subtotal Operating Expenses		\$ 755,805.00
Subtotal Direct Cost		\$ 4,942,458.00
Administration Expenses*	SCCOE indirect cost rate. Covers institutional overhead (facilities, utilities, HR, accounting, IT, executive admin) not directly charged. Does not exceed 15% per RFP.	\$ 230,339.00
GRAND TOTALS		\$ 5,172,797.00
*Administration Expenses may not exceed 15% of the total contract		

Sheet 4: Narrative Budget — Year 2 (July 1, 2027 – June 30, 2028)

STATE OF CALIFORNIA — BEHAVIORAL HEALTH SERVICES OVERSIGHT AND ACCOUNTABILITY COMMISSION		
DOCUMENT B		
NARRATIVE BUDGET TEMPLATE		
AGREEMENT #: NAME: BHSSA School Behavioral Health Performance Management System FISCAL YEAR: July 1, 2027 - June 30, 2028		
CATEGORY & LINE ITEM DESCRIPTIONS	BUDGET NARRATIVE — Provide a description of each line item.	ANNUAL PROJECT SALARY
Personnel (Salaries & Benefits)		
Project Director Dr. Deborah Gorgulho .10	Provides strategic leadership and executive oversight for all project activities. Leads LEA recruitment, manages Commission relationship, and ensures alignment of project deliverables with BHSSA goals. Chairs quarterly project steering committee meetings.	\$ 39,839.00
Program Coordinator - Dr. Pilar Vazquez-Vialva .50	Serves as day-to-day project manager. Coordinates across all subcontractors (IMPACTER, DBG, Breaking Barriers, ASR), manages deliverable timelines, schedules LEA engagements, prepares Commission progress reports, and ensures cross-deliverable dependencies are tracked.	\$ 160,277.00
Program Specialist Lead - BH (Marie Busque) .60	Leads behavioral health content development. Reviews and validates screening platform domain mappings, supports crosswalk consultations with LEAs, provides subject matter expertise on MTSS frameworks, and contributes to TTA curriculum design.	\$ 152,281.00
Program Specialist Co-Lead - BH (Tenee Brown) .50	Co-leads behavioral health content development. Reviews and validates screening platform domain mappings, supports crosswalk consultations with LEAs, provides SME on MTSS frameworks, and contributes to TTA curriculum.	\$ 120,960.00

Community Liaison (Jaime Koo) .30	Primary liaison between project and school communities. Supports stakeholder engagement, coordinates parent/family communication, ensures culturally responsive implementation across diverse LEA contexts.	\$ 72,127.00
CYBHI BH Billing Specialist (Adriana Huerta) .40	SME on CYBHI fee schedule implementation, Medi-Cal billing, and BH service delivery models. Supports LEAs on CYBHI reimbursement pathways (CPT 96127, U4 modifier). Contributes to sustainability planning.	\$ 105,065.00
LEA Engagement Coordinator (Krisan Meyer) .30	Manages day-to-day relationships with six LEA teams. Schedules/coordinates site visits, training sessions, data review meetings. First point of contact for LEA operational questions.	\$ 79,949.00
Program Associate - TA (Corrine Frese) .30	Supports TTA delivery logistics: scheduling trainings, preparing materials, coordinating refresher sessions, managing office hours, tracking educator participation, documenting coaching outcomes.	\$ 87,224.00
Data Privacy Coordinator (Irina Schacter) .30	Oversees data governance compliance across 18 sites (FERPA, HIPAA, CA-NDPA). Manages data sharing agreements, monitors privacy protocols, coordinates with IMPACTER on data security standards.	\$ 94,596.00
IT/Systems Integration (Lee Anderson) .25	Technical coordination for SIS integration between IMPACTER platform and each LEA SIS (Aeries, PowerSchool, Infinite Campus). Supports Clever SSO provisioning and troubleshoots integration issues.	\$ 79,664.00
Research Analyst - R&E 0.30	Manages data quality monitoring across all 18 sites, supports quarterly outcome report production, coordinates data review sessions with LEA teams, ensures data governance compliance.	\$ 63,095.00
CBO (Stephanie Gomez) .10	Executive fiscal oversight for the \$9M contract including subcontractor payment processing, budget monitoring, audit preparation, and compliance with state fiscal requirements.	\$ 43,004.00
Policy/Regs/Systems (Jessica Simpson) .25	Supports the development and implementation of project-related processes and policies, ensuring alignment with Education Code requirements and SCCOE regulations.	\$ 75,398.00

Admin Support (Claudia Rubio) .16	Comprehensive administrative support including scheduling, correspondence, document management, travel coordination, procurement, and meeting logistics.	\$ 34,152.00
Subtotal Personnel (Salaries & Benefits)		\$ 1,207,631.00
Program Expenses		
Training materials/refresher guides	Printed materials and refresher guides for Y2 screener windows and coaching sessions.	\$ 6,000.00
Meeting/convening expenses	Venue, AV, catering for Y2 in-person learning collaboratives (Q4, Y2-Q2).	\$ 8,000.00
Training Guide production	Professional graphic design, layout, production of Performance Management Training Guide.	\$ 8,000.00
Communications materials	Ongoing stakeholder engagement and project dissemination materials.	\$ 4,000.00
Translation/interpretation	Y2 multilingual stakeholder sessions.	\$ 2,000.00
Printing (Guide, Final Report)	Training Guide pilot copies, Final Report, Commission deliverables.	\$ 2,000.00
Subtotal Program Expenses		\$ 30,000.00
Subcontractors		
IMPACTER Education Corporation	\$600,000 Y2: Ongoing platform maintenance, quarterly reports (Q4-Y2Q3), longitudinal analysis, student voice extraction for Final Report, Training Guide tech chapters, evaluation exports, SIS maintenance. CYBHI-reimbursable (CPT 96127, \$4.81/admin).	\$ 600,000.00
Deveau Burr Group (DBG)	\$800,000 Y2: Ongoing coaching/TA, Q4-Y2Q3 collaborative facilitation and summaries, Training Guide policy/practice/sustainability chapters, Final Report implementation science sections, compilation review.	\$ 800,000.00
Breaking Barriers California	\$128,000 Y2: Strategic advisory at quarterly convenings on policy, compliance, scalability. Sustainability/cross-system integration sessions. Final Report policy/compliance analysis. Training Guide sustainability chapter.	\$ 128,000.00

Applied Survey Research (ASR)	\$150,000 Y2: Longitudinal evaluation (multilevel modeling, path analysis, dosage analysis), 36+ qualitative interviews, thematic coding, Training Guide evaluation chapter, Final Report methodology.	\$ 150,000.00
Subtotal Subcontractors		\$ 1,678,000.00
Operating Expenses		
Staff travel	Mileage, lodging, per diem for site visits, learning collaboratives, Final Report meetings.	\$ 80,000.00
LEA Incentive	\$120,000 per LEA x 6 LEAs (\$720,000 total, 50% distributed Y2). Pass-through for LEA staff time.	\$ 360,000.00
Technology licenses	Project management, teleconferencing, cloud storage.	\$ 35,000.00
Data security (ongoing)	Ongoing data security and privacy compliance for student data protection.	\$ 30,000.00
Training Guide pilot	Pilot testing Training Guide at 2-3 participating schools.	\$ 25,000.00
Final Report production	Professional production, formatting, distribution of Final Report.	\$ 25,000.00
Professional development	Conference registration and travel for SCCOE staff.	\$ 20,000.00
Postage/shipping	Distributing deliverables.	\$ 10,000.00
Insurance/project coordination	Liability, professional insurance, communications infrastructure, Y2 project coordination.	\$ 138,812.00
Subtotal Operating Expenses		\$ 723,812.00
Subtotal Direct Cost		\$ 3,639,443.00
Administration Expenses*		\$ 187,760.00
GRAND TOTALS		\$ 3,827,203.00
*Administration Expenses may not exceed 15% of the total contract		

Exhibit B: Subcontractor Letters of Intent

B.1. Stanford School Of Medicine, Center For Population Health Sciences



March 6, 2026

Dr. David M. Toston, Sr., Superintendent
Santa Clara County Office of Education
1290 Ridder Park Drive
San Jose, CA 95131

Re: Letter of Intent — RFP BHSSA-Evaluation-002, School Behavioral Health Performance Management System

Dear Dr. Toston,

The Stanford Center for Population Health Sciences (PHS), in collaboration with the Stanford Graduate School of Medicine and Stanford Graduate School of Education, hereby confirms its intent to participate as a research and predictive analytics partner in the proposal being submitted by the Santa Clara County Office of Education in response to RFP BHSSA-Evaluation-002 issued by the Behavioral Health Services Oversight and Accountability Commission.

Organizational Background. The Stanford Center for Population Health Sciences (PHS) is the home of the PHS Data Core, which specializes in hosting and managing large-scale, high-sensitivity research datasets used by hundreds of researchers to answer questions in precision and population health. PHS is the institutional home of the [American Family Cohort \(AFC\)](#), a research dataset derived from the PRIME Registry — the largest primary care clinical data registry in the United States, containing electronic health record data on more than 8 million patients across all 50 states.

The [AFC Health project](#), funded by a \$6.4 million award from the Advanced Research Projects Agency for Health (ARPA-H), aims to expand this registry and build an enriched dataset to elucidate the social determinants of health and causal drivers of disease, with a particular focus on enabling large-scale evaluation of the health effects of educational policies. The Stanford Graduate School of Education brings complementary expertise in psychometrics, educational measurement, and policy analysis through its faculty and through Policy Analysis for California Education (PACE).

Scope of Collaboration. Under this project, Stanford intends to contribute research expertise and advisory support in the following areas:

- **Behavioral Health Metrics Design:** Contributing population health science and educational measurement expertise to the identification and selection of behavioral health performance metrics that bridge school-based and primary care outcomes.

- **Predictive Analytics Methodology:** Informing the design of cross-system analytical approaches that link school-based behavioral health screening data with population health datasets to generate predictive insights on student outcomes, including attendance, behavioral indicators, and academic trajectories.
- **Research Advisory:** Participating in the project's Collaborative Learning Groups and advising on data collection methodology, longitudinal study design, and equity-centered subgroup analysis.
- **Statewide Scalability Recommendations:** Contributing to the Final Report's recommendations for statewide expansion of school behavioral health performance management systems, informed by AFC Health's national data infrastructure and research framework.

Key Personnel. Stanford personnel expected to contribute to this project include:

- **Ben Domingue, Ph.D.** — Associate Professor, Stanford Graduate School of Education; Faculty Fellow, Stanford Center for Population Health Sciences; Faculty Director, Policy Analysis for California Education (PACE). Research expertise in psychometrics, educational measurement, and quantitative methods for understanding student outcomes.
- **David Rehkopf, Sc.D., M.P.H.** — Professor, Department of Epidemiology and Population Health, Stanford School of Medicine; Principal Investigator, AFC Health (ARPA-H). Research expertise in social determinants of health, causal inference, and population-level health outcomes.
- **Isabella Chu, M.P.H.** — Associate Director, Data Core, Stanford Center for Population Health Sciences. Expertise in data governance, regulatory compliance, data security and privacy, and large-scale research data infrastructure.

Any data-sharing arrangements between Stanford, SCCOE, and project partners will be formalized through appropriate memoranda of understanding, data privacy agreements, and institutional review board protocols following contract award. This letter expresses Stanford's intent to collaborate and does not constitute a binding contractual commitment.

Commitment. Stanford is prepared to engage in this collaboration upon contract award and to contribute research expertise and advisory support for the full contract term through June 30, 2028.

We look forward to partnering with SCCOE, IMPACTER, and the project team on this important initiative to advance school-based behavioral health measurement and student outcomes.

Sincerely,



Ben Domingue, PhD
Associate Professor, Stanford Graduate School of Education
Faculty Director, Stanford PACE [Policy Analysis for California Education]
Associate Professor (by courtesy), Stanford Department of Sociology
Faculty Affiliate/Fellow at the Stanford Population Health Sciences, Stanford Data Science (SDS),
The Stanford Center on Early Childhood, Stanford Center on Longevity, Stanford Center for Open
and REproducible Science (CORES)
bdomingue@stanford.edu | <https://profiles.stanford.edu/benjamin-domingue>



David Rehkopf, ScD
Professor, Epidemiology and Population Health
Professor, Medicine – Primary Care and Population Health
Professor (by courtesy) Sociology, Pediatrics and Health Policy
Faculty Director, Stanford Center for Population Health Sciences
drehkopf@stnaford.edu | <https://profiles.stanford.edu/david-rehkopf>

B.2. Impacter Education Corporation - Letter of Intent



March 3, 2026

Dr. David Toston, Superintendent
Santa Clara County Office of Education
1290 Ridder Park Drive
San Jose, CA 95131

Re: Letter of Intent — RFP BHSSA-Evaluation-002, School Behavioral Health Performance Management System

Dear Dr. Toston,

Impacter Pathway hereby confirms its intent to serve as a subcontractor to the Santa Clara County Office of Education (SCCOE) in response to RFP BHSSA-Evaluation-002 issued by the Behavioral Health Services Oversight and Accountability Commission.

Organizational Background: Impacter Pathway is an education technology company that has developed an evidence-based spoken-language behavioral health screening and performance management platform. The platform uses natural language processing and machine learning to analyze authentic student voice data — spoken reflections recorded by students in any language — and produce rubric-aligned scores across six validated behavioral health domains: *Self-Insight*, *Emotional Resilience*, *Conflict Resolution*, *Effective Help-Seeking*, *Relational Awareness*, and *Reflective Growth*. The platform integrates with major Student Information Systems (Aeries, PowerSchool, Illuminate), automates MTSS tiering recommendations, and generates school-level and cross-LEA outcome reports.

Scope of Work. Under this project, Impacter Pathway will be responsible for:

- Deploying and configuring the behavioral health screening and performance management platform across 18 school sites in 6 LEAs
- Developing custom dashboards with role-based views for counselors, site administrators, and district leadership

- Building SIS integrations for automated student rostering and demographic data
- Conducting crosswalk consultations to map each LEA's existing behavioral health framework onto the project's six-domain competency architecture
- Administering behavioral health screeners and training school staff on screener administration and dashboard interpretation
- Operating the ML scoring pipeline and automated MTSS tiering engine
- Generating quarterly Student Services and Outcome Reports (18 individual school summaries plus cross-LEA summaries) for each reporting period
- Contributing technology and data chapters to the Student BHPM Training Guide
- Providing longitudinal data analysis and student voice data for the Final Report
- Providing ongoing technical support and platform maintenance throughout the contract term

Staff Experience: Impacter Pathway's team brings direct experience designing, developing, and implementing technology systems that improve school and student outcomes. Resumes for key contributors are attached. Key personnel include:

- **Joshua Arnold, Ed.D. (Co-Founder & Co-CEO)** — Former superintendent (Culver City USD, CATCH Prep), assistant superintendent (Los Alamitos USD), and principal with 20+ years in K–12 leadership spanning instructional improvement, assessment design, benchmark development, and equity-centered school reform. Co-developed the College Board's Pre-AP English curriculum. Leads IMPACTER's strategy, school partnerships, and competency architecture design.
- **Daniel Byun (Co-Founder & Co-CEO)** — 25+ years building and scaling education-facing organizations, including founding FLEX College Prep. Brings operational rigor in service delivery systems, team development, quality standardization, and partner relationship management. Leads IMPACTER's operations, implementation planning, and deployment readiness across school and district partners.
- **Andrew Arnold, Ph.D. (Machine Learning & NLP)** — Principal Applied ML Engineer at Shopify and former Chief Scientist at Oracle Alpha, Senior Science Manager at AWS AI Labs (leading 45+ applied research scientists), and ML researcher at Google. Ph.D. in Machine Learning from Carnegie Mellon University. Published across NeurIPS, ACL, NAACL, EMNLP, SIGIR, and KDD. Adjunct professor at NYU. Leads IMPACTER's NLP model development, scoring pipeline architecture, and ML system evaluation.

The platform has been developed over multiple years of iterative testing with school partners, and the team collectively brings expertise spanning K–12 instructional leadership, NLP model

development, psychometric validation, enterprise analytics platform design, SIS integration engineering, data visualization, and school-based implementation support.

Commitment: Impacter Pathway is prepared to enter into a subcontract agreement with SCCOE upon award and execute the scope of work described above for the full contract term through June 30, 2028.

We look forward to partnering with SCCOE and the project team on this important initiative.

Sincerely,

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

Joshua Arnold
Co-Founder and Co-CEO
IMPACTER PATHWAY

B.3. Deveau Burr Group (DBG) - Letter of Intent



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March 4, 2026

Dr. David Toston, Superintendent
Santa Clara County Office of Education
1290 Ridder Park Drive
San Jose, CA 95131

Re: Letter of Intent — RFP BHSSA-Evaluation-002, School Behavioral Health Performance Management System

Dear Dr. Toston,

The Deveau Burr Group (DBG) hereby confirms its intent to serve as a subcontractor to the Santa Clara County Office of Education (SCCOE) in response to RFP BHSSA-Evaluation-002 issued by the Behavioral Health Services Oversight and Accountability Commission (BHSOAC).

DBG brings extensive experience supporting California school systems, county offices of education, and statewide initiatives through technical assistance, policy-to-practice implementation, and capacity-building strategies that help local educational agencies (LEAs) operationalize complex initiatives across multiple systems. Our team has supported large-scale initiatives involving behavioral health services, accountability, and cross-agency coordination.

Most recently, DBG served as a technical assistance provider under the California Youth Behavioral Health Initiative (CYBHI) Capacity Grant, where we supported county offices of education and LEAs to translate policy frameworks into implementation strategies, build local capacity, and align behavioral health service delivery systems in preparation to bill the new Fee Schedule. Through this work, DBG has developed deep experience supporting schools and education partners in designing systems that leverage data, continuous improvement practices, and cross-sector partnerships to strengthen student behavioral health outcomes.

Organizational Background

The Deveau Burr Group is a California-based consulting firm that provides strategic advise, technical assistance, and implementation support across the education, health, and public sector ecosystems. DBG specializes in helping public agencies translate state policy and programmatic initiatives into actionable strategies at the local level. Our team has extensive experience supporting:



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- Local Education Agencies (LEAs)
- County Offices of Education
- State Agencies
- Statewide education initiatives
- Behavioral health and youth wellness programs
- Multi-agency partnerships involving education, behavioral health, and community organizations

DBG's approach centers on building local capacity while ensuring alignment across policy, practice, and data systems, which is essential to implementing sustainable school-based behavioral health systems.

Scope of Work

Under this project, Deveau Burr Group will provide technical assistance, capacity building, and implementation support to participating LEAs to support the development and implementation of school-based behavioral health performance management systems. DBG's responsibilities will include, but not be limited to:

Technical Assistance and Capacity Building

- Supporting SCCOE and project partners in the recruitment and engagement of participating LEAs and schools.
- Assisting LEAs and schools in assessing their current behavioral health service delivery infrastructure, including data collection, reporting systems, and performance monitoring practices.
- Providing individualized and group technical assistance to participating LEAs and school teams to strengthen their ability to implement behavioral health performance management strategies.

Implementation Support

- Supporting schools in aligning their behavioral health systems with a performance management framework, including identifying key metrics, indicators, and outcomes aligned with BHSSA requirements.
- Assisting LEAs in developing data-informed decision-making processes, including goal-setting, monitoring of behavioral health supports, and tracking progress toward student outcomes.
- Supporting schools in integrating performance management strategies within existing frameworks such as Multi-Tiered Systems of Support (MTSS), Community Schools, and other whole-child initiatives.



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Training and Learning Collaboratives

- Designing and facilitating training sessions and learning collaboratives for participating LEAs, school leaders, and behavioral health partners focused on performance management, behavioral health systems improvement, and continuous improvement strategies.
- Supporting the development of tools and protocols that enable schools to track behavioral health services, supports, and outcomes.

Statewide Knowledge Development

- Contributing to the development of project deliverables including training materials, technical assistance resources, and documentation of lessons learned that will support the broader expansion of school behavioral health performance management systems across California.

Key Personnel

DBG's work will be led by a team with extensive experience in statewide education initiatives, behavioral health policy, and implementation support for schools, county offices of education and state agencies.

- **Andrea Deveau – Co-Founder, Deveau Burr Group**
Andrea Deveau brings extensive experience in strategic policy development, statewide initiative design, and public sector leadership. She has supported multiple large-scale education and health initiatives across California and leads DBG's statewide partnerships.
- **Danielle Sires – Chief Operating Officer**
Danielle Sires has deep experience in education systems transformation and policy statewide. She brings expertise in performance management strategies and cross-agency collaboration.
- **Gina Plate – Senior Vice President, Education**
Gina Plate leads DBG's education practice and brings extensive experience supporting statewide initiatives focused on student well-being, behavioral health systems, and education policy implementation. She has supported local LEAs, county offices of education and state agencies in designing and implementing technical assistance strategies that bridge policy and practice.
- **Dominique Weller – Outreach and Education Policy Coordinator**
Dominique Weller brings experience supporting multi-agency initiatives focused on student well-being, systems alignment, and program implementation across education and community partners.



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- **Allison Magill – Strategic Advisor**

Allison Magill specializes in program implementation and technical assistance to schools and LEAs, with a focus on building local capacity to support student outcomes and cross-sector collaboration. As an attorney, Allison brings a unique skill set to the development of program and implementation.

Commitment

The Deveau Burr Group is prepared to enter into a subcontract agreement with the Santa Clara County Office of Education upon award and to execute the scope of work described above for the full contract term through June 30, 2028. We are honored to partner with SCCOE and the project team to advance this important work strengthening school-based behavioral health systems and improving outcomes for students across California.

We look forward to contributing our expertise in statewide implementation, technical assistance, and education systems transformation to support the success of this initiative.

Sincerely,

A handwritten signature in black ink, appearing to read 'AD', is written over a circular stamp that contains the letters 'AD'.

Andrea Deveau
Deveau Burr Group

B.4. Breaking Barriers California - Letter of Intent



March 6, 2026

Dr. David Toston, Superintendent
Santa Clara County Office of Education
1290 Ridder Park Drive
San Jose, CA 95131

Re: Letter of Intent — RFP BHSSA-Evaluation-002, School Behavioral Health Performance Management System

Dear Dr. Toston,

Breaking Barriers hereby confirms its intent to serve as a subcontractor to the Santa Clara County Office of Education (SCCOE) in response to RFP BHSSA-Evaluation-002 issued by the Behavioral Health Services Oversight and Accountability Commission (BHSOAC).

Breaking Barriers brings extensive experience supporting California school systems, county offices of education, Interagency Leadership Teams, and statewide initiatives through technical assistance, policy-to-practice implementation, and capacity-building strategies that help local educational agencies (LEAs) operationalize complex initiatives across multiple systems.

Most recently, Breaking Barriers is helping to lead the Children and Youth Behavioral Health Initiative's (CYBHI) Transforming Together (T2) Collaborative Leadership Working Group, which convenes counties implementing CYBHI for training, technical assistance and support in implementing successful integrated local ecosystems that support Whole Child efforts. Breaking Barriers serves as the lead organization in the development and writing of the statewide Ecosystem Implementation Guide and is responsible for statewide learning webinars for county offices of education, behavioral health, managed care health plans, child welfare departments, community-based providers, youth and parents. Additionally, Breaking Barriers is providing training and technical assistance on HIPAA/FERPA across the state, supporting jurisdictions in their efforts to reduce the barriers to care and support for all children and youth.

Organizational Background

Breaking Barriers is a Whole Child Hub, in partnership with University of the Pacific, that provides a statewide backbone that coordinates technical assistance, develops a cross-system workforce, translates lived experience into policy, and sustains a community of practice.

The Hub builds on Breaking Barriers' five proven strategies over the past 10 years:

1. Advocacy – Elevating youth, family and county voices.
2. Research & Policy – Translating insights into statewide guidance and research that informs a more integrated ecosystem for children, their families, and those serving and supporting them.
3. Community of Practice – Convening cross-sector leaders, including youth, to accelerate integration
4. Identification of Models – Showcasing scalable local solutions



5. Technical Assistance & Training – Developing and delivering practical tools and support for a California integrated children’s ecosystem, including preservice, in service and system consultation.

Scope of Work

Breaking Barriers will serve as an implementation and stakeholder engagement partner supporting SCCOE’s BHSSA Performance Management System Project. Led by Elizabeth Estes, Breaking Barriers brings extensive experience working at the intersection of California’s behavioral health, education, and child-serving systems. The team will support recruitment and engagement of participating LEAs and schools, leveraging longstanding relationships with county behavioral health departments, school partners, and community-based organizations across California. Breaking Barriers will also provide training and technical assistance to partner teams, facilitate learning collaboratives and communities of practice, and support partners in using performance data to strengthen school-based behavioral health programs. In collaboration with the evaluation lead, the team will help ensure that performance management tools and metrics are practical and usable for local implementation. Breaking Barriers will also contribute to documenting lessons learned and translating findings into actionable recommendations to inform statewide scaling and sustainability of school behavioral health systems.

Outlined below are the key areas of contribution to SCCOE’s BHSSA Performance Management System Project:

State and Local Systems Integration Expertise

- State level network supporting the integration of systems at state and local levels
- Provide expertise in the design of local (and state level) Ecosystems
- Serve as subject matter expert as leader of initiatives and the implementation of CYBHI
- Serve as subject matter expert in HIPAA/FERPA and scope of practice issues
- Provide landscape knowledge of statewide efforts on implementation of the fee schedule and other BHSSA related services

Implementation Support & Continuous Improvement for School–County Partnerships

- Facilitating implementation planning with county–school partnerships
- Supporting continuous quality improvement (CQI) cycles
- Helping partners interpret data and translate it into practice improvements
- Developing implementation roadmaps for behavioral health service integration in schools

Stakeholder Engagement, Learning Collaboratives, and Communities of Practice

- Communities of Practice for BHSSA grantees
- Stakeholder engagement processes with:
 - counties
 - schools
 - community-based organizations
 - youth and families
- Structured learning collaboratives to share implementation lessons
- Facilitated convenings to interpret findings and spread best practices



Translating Data into Policy and Systems Change

- Synthesizing evaluation findings into policy and systems insights
- Developing recommendations for statewide behavioral health infrastructure
- Identifying sustainability pathways for school behavioral health programs
- Producing clear narratives and reports for policymakers

Key Personnel

Breaking Barrier's work will be led by a team with extensive experience in statewide education and integrated systems initiatives, behavioral health and children's services policy, and implementation support for schools, county offices of education and state agencies.

- **Elizabeth Estes, JD – Founder and Executive Director, Breaking Barriers**
Elizabeth Estes brings extensive experience in statewide initiative design, integrated systems design and implementation, and leadership in bringing together local and statewide leaders towards reducing barriers to services for youth. With over 30 years of experience and expertise in systems integration, legal consultation for school districts and advocacy for improved and integrated policy, Elizabeth will provide key subject matter expertise, convening and network building expertise to this project.
- **Natalia Lazor – Director of Operations, Breaking Barriers**
Natalia Lazor brings expertise in project management and is responsible for the overall day to day operations of the Breaking Barriers program, supporting the leadership and partners in coordination of events. Natalia also leads the design and implementation of Breaking Barriers annual symposium, attended by over 500 individuals representing counties across the state.
- **Christine Stoner-Mertz, LCSW – Consultant to Breaking Barriers**
Christine Stoner-Mertz brings over 35 years of leadership in community-based organizations serving children, youth and families, as well as statewide policy, advocacy, training and technical assistance on integrating child-serving systems effectively. With decades of expertise in the program design and financing of child welfare, education, behavioral health and philanthropy, her expertise will support Breaking Barriers in this project through subject matter expertise, technical assistance and integrated financing strategies.

Commitment

Breaking Barriers is prepared to enter into a subcontract agreement with the Santa Clara County Office of Education upon award and to execute the scope of work described above for the full contract term through June 30, 2028. We are honored to partner with SCCOE and the project team to advance this important work strengthening school-based behavioral health systems and improving outcomes for students across California.

We look forward to contributing our expertise in systems integration, implementation support and CQI, stakeholder engagement, and translating data to policy and systems change.

UNIVERSITY OF THE
PACIFIC

McGeorge
School of Law

breaking
barriers
THE POWER OF ONE

Sincerely,



Elizabeth Estes

Executive Director

B.5. Applied Survey Research (ASR) - Letter of Intent



March 6, 2026

Dr. David Toston, Superintendent
Santa Clara County Office of Education
1290 Ridder Park Drive
San Jose, CA 95131

Re: Letter of Intent — RFP BHSSA–Evaluation–002, School Behavioral Health Performance Management System

Dear Dr. Toston,

Applied Survey Research is pleased to submit the attached Letter of Intent to serve as a subcontractor to the Santa Clara County Office of Education (SCCOE) in response to RFP BHSSA–Evaluation–002, issued by the Behavioral Health Services Oversight and Accountability Commission.

Organizational Background

Founded in 1980, Applied Survey Research (ASR) is a nonprofit social research firm whose mission is to help people build better communities. ASR provides award-winning services such as needs assessments, strategic planning, program design, and evaluation services to federal, state, county, and city agencies, county offices of education and school districts, foundations, nonprofit organizations, and collective impact coalitions. Our research focuses on the issues in which vulnerable populations are disproportionately affected, such as early childhood development and education, school readiness, K–12 success, youth development and behavioral health, family support, health care, domestic violence, child welfare, substance use, mental health, housing, and homelessness.

Since 2004, ASR has been a research and evaluation partner to Santa Clara County Office of Education, with contracts including biannual countywide kindergarten readiness assessments, 8–year evaluation of teacher, classroom and student outcomes at Educare California at Silicon Valley, Early Learning Master Plan update, and Universal Pre–K (UPK) grant facilitation. Additionally, ASR has been a longtime collaborative partner of SCCOE, supporting the development of DataZone, evaluation of the Inclusion Collaborative, and strategic planning with Kids in Common and the countywide Children’s Agenda Network.

Scope of Work

As a subcontractor to SCCOE, ASR will support the success of the School Behavioral Health Performance Management System project in the following ways:

1. Help establish the overall program design, theory of change and project workplan to meet grant goals and deliverables;
2. Conduct a literature review of relevant process and outcome metrics for school-based behavioral health (SBH) systems of care across the state and nation;
3. Help create the core evaluation framework, encompassing school-level and student-level process and outcome metrics;
4. Support the design and implementation of monthly dashboards for schools to monitor student behavioral health services and outcomes;
5. Conduct longitudinal statistical analyses with de-identified student-level data to evaluate the ways in which Multi-Tiered Systems of Support, utilization of school-based behavioral health performance management systems, and technical assistance and training have a positive impact on student attendance, behavioral, and academic outcomes;
6. Conduct qualitative research when needed (e.g., educator/counselor interviews across 18 sites) to inform service delivery, systems improvements and sustainability strategies for SBH systems; and
7. Author evaluation chapters of the Training Guide and the Final Report.

Staff Experience:

With our long history of working directly in schools, content knowledge of behavioral health, experience setting up repeatable measurement systems, advanced competencies with both empirical and applied research methods, and forging long-standing successful partnerships, ASR is uniquely suited to assist SCCOE in establishing and evaluating school behavioral health performance management systems that improve student outcomes.

Resumes for key contributors are attached. Key personnel for this subcontract include:

- **Lisa Colvig-Niclai, MA** (*Senior Vice President of Planning and Evaluation*) —With her graduate degree from Stanford University in Education Policy Analysis and Evaluation, and 27 years at Applied Survey Research, Lisa's career has focused on establishing focused, practical and sustainable measurement systems that help educators and providers support child and family success. Examples include design and evaluation of the five-year Universal Access Pilot to address student social-emotional wellness in two high needs school districts in Santa Clara County, and the four-year PreK-3 Initiative/ Ready Schools initiative across four Marin County districts to improve kindergarten to third grade outcomes. Lisa has also led longitudinal studies with LEAs in six counties, using de-identified SIS data to evaluate how kindergarten readiness predicts academic achievement, attendance and behavioral outcomes in later grades. Lisa also spearheaded a seven-year evaluation with Santa Clara County Behavioral Health's KidConnections Network (KCN), revealing that this system of care to identify, triage, and serve child behavioral health needs across a network of six provider agencies delivered consistent outcomes on standardized measures such as the Child and Adolescent Needs and

Strengths (CANS). Lisa also led multi-year evaluations for Santa Clara County and San Mateo County juvenile probation, and MHSA-funded evaluations of student behavioral health services in Siskiyou County schools. Lisa is currently supporting First 5 Siskiyou and Siskiyou County Office of Education to leverage the multi-payer fee schedule to cover behavioral health needs of students and their families.

- **Elizabeth Mower (Martinez), MA** (*Project Director*) – With her graduate degree in Sociology, Ms. Mower has over 10 years of research and program evaluation experience supporting initiatives in early childhood development, child health and safety, school climate, student wellness, behavioral health, substance abuse prevention, mental health intervention, and community needs assessments. With advanced skills in data manipulation and statistical analysis, Elizabeth has a keen knack for simplifying complex data into concise visualizations and dashboards, and using these platforms to catalyze program and system improvements. Relevant project highlights include: Sacramento County Youth Behavioral Health Needs Assessment; data dashboarding in Tableau of county-level youth data for the California Office of Youth and Community Restoration (OYCR); Sacramento County Children and Youth System of Care (AB2083) data dashboarding across partners, including Sacramento County Office of Education’s school-based behavioral health services; Siskiyou County MHSA evaluation of children and youth behavioral health programs; Lodi Unified School District Learning Communities for School Success; Sonoma County Department of Public Health Student Wellness (SNAP-Ed); Tennessee Advancing Wellness and Resilience in Education (TN AWARE) data infrastructure for student triage to MTSS services and the Tennessee Together Statewide Student Survey; Tennessee Office of Prevention Services, Tennessee Partnerships for Success evaluation of programs to reduce substance use among youth; HOME WORKS! Teacher Home Visit Evaluation.
- **Alyssa Mullins, PhD** (*Senior Project Manager*) – Dr. Mullins’ research focuses on the health and wellbeing of children, families, and communities. She applies advanced technical skills throughout data collection and management, quantitative and qualitative methodologies, complex statistical analyses, data dashboarding in Tableau, and preparation of written reports for various audiences. Alyssa’s relevant project highlights at ASR include obtaining de-identified client-level data from Sacramento County Child Welfare to evaluate child maltreatment outcomes for clients served by family resource centers; population-level analysis of child and family wellbeing for Sierra Health Foundation; and evaluation of Sacramento County Office of Education’s Help Me Grow, an initiative that seeks to address child developmental and behavioral concerns with a system of child and family support.
- **Jessica Irwin, PhD** (*Project Manager*) – Dr. Irwin holds a Ph.D. in developmental psychology with a minor in statistics from Wayne State University and completed extensive postdoctoral training at the University of Rochester, UCLA, and Chapman University. She also has years of experience teaching statistics, research methods, and developmental psychology courses as a university professor. Her research,

which uses a biopsychosocial theoretical framework to examine risk and resilience, has been published in top-tier journals and presented at various national and international conferences. At ASR, Jessica's work focuses on emotional health and wellbeing across the life span, with relevant project highlights including: Santa Clara County Behavioral Health's KidConnections Network (KCN) evaluation, using de-identified child service and outcome data; Quasi-experimental design (QED) evaluation of child maltreatment outcomes for family resource center clients, using de-identified client-level administrative data from Sacramento County Child Welfare; and Quasi-experimental design (QED) evaluation of child maltreatment outcomes for African American families in the Cultural Broker program, using de-identified client-level administrative data from Sacramento County Child Welfare. She also assessed longitudinal academic outcomes of high school students with autism.

- **Javari Fairclough, PhD** (*Senior Data Analyst*) – With his doctorate in Human Development and Family Sciences, Dr. Fairclough is an applied quantitative research methodologist with roots in the field of psychology. His research has been centered around positive youth development and the complex interplay between the family unit, peers, and problem behaviors (e.g., youth aggression, delinquency, and substance use) among at-risk youth using novel data analytic and statistical methodologies. At ASR, key project highlights include evaluation of Riverside County Juvenile Probation programs; data dashboarding in Tableau of county-level youth data for the California Office of Youth and Community Restoration; statewide kindergarten readiness assessments for Missouri Department of Elementary and Secondary Education; and statistical modeling of administrative data to identify the family factors that predict child abuse and neglect (CAN) critical injuries and fatalities in Sacramento County.

Commitment:

Given our mission to help people build better communities with high quality, useful data, Applied Survey Research is fully committed to supporting the successful implementation and evaluation of school behavioral health performance management systems across 6 LEAs. ASR is prepared to enter into a subcontract agreement with SCCOE upon award, and execute the scope of work described above for the full contract term through June 30, 2028.

Sincerely,



Lisa Niclai, MA
Senior Vice President of Planning and Evaluation
Applied Survey Research
lisa@appliedsurveyresearch.org

Exhibit C: Key Personnel Resumes

C.1. David Toston, Ed.D. — Superintendent, SCCOE

DAVID M. TOSTON, Sr., Ed.D.

County Superintendent of Schools | Santa Clara County, California
Phone: 530-957-0710 | Email: dtoston@sccoe.org

PROFESSIONAL SUMMARY

County Superintendent of Schools and accomplished education executive with more than 20 years of leadership experience at the county, regional, and state levels. Proven leader of complex educational systems with deep expertise in governance, fiscal oversight, special education, instructional improvement, and equity-centered reform. Recognized for building high-performing teams, strengthening partnerships, and aligning vision, strategy, and operations to improve outcomes for students and communities.

PROFESSIONAL EXPERIENCE

County Superintendent of Schools, Santa Clara County Office of Education (SCCOE) — San Jose, CA

- Led a community-driven strategic planning process engaging the County Board of Education, district leaders, educators, students, families, and community partners, resulting in an updated Board Vision, Goals, and multi-year Strategic Plan aligned to countywide priorities and student outcomes.
- Launched a countywide Partnership Initiative with Community-Based Organizations to align efforts, resources, and impact across Santa Clara County, strengthening collaboration in support of students, families, and historically underserved communities.
- Serve as chief executive officer for one of California's largest county offices of education, providing leadership and statutory oversight to 31 school districts and countywide programs.
- Oversee countywide fiscal monitoring, audits, and district budget approvals to ensure solvency, accountability, and compliance with state law.
- Lead special education governance and SELPA oversight, advancing inclusive practices and improved outcomes for students with disabilities.
- Represent Santa Clara County at regional and statewide superintendent, legislative, and policy forums.

Senior Advisor, Strategic Initiatives, California Collaborative for Educational Excellence

- Member of executive leadership team coordinating statewide support programs, research, and technical assistance to improve student academic outcomes.
- Led the Statewide Community Engagement Initiative, overseeing a \$100M investment supporting districts in trust-building and continuous improvement.
- Directed targeted improvement efforts resulting in increased ELA achievement and reduced chronic absenteeism.

Adjunct Professor, University of La Verne — LaFetra College of Education

- Teach graduate-level courses in School Psychology and Counseling focused on equity-centered leadership and evidence-based practice.

Associate Superintendent, El Dorado County Office of Education — Placerville, CA

- Lead executive overseeing SELPA operations, county programs, and statewide capacity-building initiatives.
- Directed strategic allocation of \$250M in state and federal funds and advanced MTSS implementation across LEAs.
- Founded an annual Leadership Academy focused on instructional leadership, inclusion, and fiscal management.

Assistant Superintendent, SELPA, Sutter County Superintendent of Schools — Yuba City, CA

- Cabinet-level leader supporting 15 districts and special education programs serving over 18,000 students.
- Led allocation reform, inclusive preschool expansion, and labor negotiations tied to program reorganization.

Assistant Director, Northwest Educational Service District 189 — Anacortes, WA

- Managed alternative education, juvenile hall, special education, and residential programs across five counties.

Earlier Roles: Special Education Director / School Psychologist (Tehachapi USD); Language Arts Teacher (Hesperia USD).

STATEWIDE & PROFESSIONAL LEADERSHIP

- California Advisory Commission on Special Education — Senate Appointee; Chair and Vice Chair roles
- Black Student Achievement Task Force — Member
- Coalition for Adequate Funding for Special Education — Chair and Treasurer
- CA State Family Empowerment Network — Governance & Accountability

EDUCATION

- Doctor of Education (Ed.D.), Organizational Leadership — University of La Verne
- Administrative Credential — Western Washington University
- Master of Arts, Educational Psychology — Azusa Pacific University
 - Pupil Personnel Services Credential: School Psychology
 - Pupil Personnel Services Credential: Counseling
- Bachelor of Arts, English — Pacific Union College

ADVANCED TRAINING & CERTIFICATIONS

- Family & Community Engagement — Harvard University
- Improvement Coach — Institute for Healthcare Improvement
- National Superintendents Academy — Atlantic Research Partners
- Charter School Business Officer Training — Charter Schools Development Center
- Business Officials Academy — California Association of School Business Officials

C.2. Deborah Gorgulho, Ed.D. — Assistant Superintendent, SCCOE

DEBORAH GORGULHO (PADILLA) ED.D.

(408) 710-5633

debgorgulho@gmail.com

1244 Blue Parrot Court, Gilroy, C 95020

KEY LEADERSHIP COMPETENCIES

- **Strategic Leadership:** Expertise in designing and implementing programs aligned with district priorities, ensuring sustained improvement and innovation.
- **Equity and Inclusion:** Demonstrated success in dismantling systemic barriers and advocating for underserved communities.
- **Fiscal Stewardship:** Strong experience in budget management, navigating funding complexities, and ensuring financial accountability.
- **Collaborative Partnerships:** Builder of robust community and agency partnerships to support student wellness and success.
- **Instructional Excellence:** Proven record of improving student achievement through data-driven decision-making and professional learning communities.
- **Board and Stakeholder Engagement:** Skilled in navigating board dynamics, labor relations, and fostering transparent communication with all stakeholders.



PERSONAL VISION

Visionary, student-centered educational leader committed to fostering equitable, high-quality learning environments that prioritize student success. Dedicated to fiscal accountability, strategic planning, and innovative program development.



PROFESSIONAL EXPERIENCE

Assistant Superintendent

2023 - PRESENT

Educational Progress Division

Santa Clara County Office of Education

Dynamic servant leader guiding county-wide initiatives to advance equity, strengthen community engagement, and improve student outcomes.

Key Accomplishments

- Strategically restructured departments to adapt to everchanging needs and maintain fiscal solvency
- Navigated board relations and policy development through active participation in multiple committees, including the Joint Legislative Advisory Committee and Budget Study Committee
- Led coaching for local education agencies on the revised Local Control Accountability Plan (LCAP) by fostering inclusive stakeholder engagement
- Oversaw the Innovations Collaborative Department ensuring access for students with disabilities by supporting and training districts in Universal Design for Learning (UDL)
- Managed all State and Federal compliance monitoring for 31 districts
- Created a cross-divisional leadership team to focus on providing exceptional customer service to all educational partners throughout the county
- Monitored differentiated assistance teams for districts and charter schools within the county and the bay area region
- Maintained fiscal oversight of grants and budget allocations to maintain fiscal solvency and optimize funding sources
- Supported community partnerships

DEBORAH GORGULHO (PADILLA) ED.D.

page 2

LANGUAGES

English
Spanish

EDUCATION

Ed.D. Northcentral University
M.A. San Jose State University
B.A. University of California, Santa Barbara

PROFESSIONAL RECOGNITIONS

- ACSA Educational Services Administrator of the Year
- CalSOAP Educator of the Year
- Morgan Hill Educator of the Year
- Santa Clara County Bilingual Educator of the Year

TEACHING EXPERIENCE

- 2000-2004 Assistant Principal, Live Oak High School
- 1996-2000 English, World History and ELD Teacher, EL Coordinator, Homestead High School
- 1992-1996 English and Spanish Teacher, Department Chair, Martin Murphy Middle School



Director of Educational Services-Secondary
Gilroy Unified School District

2015-2023

Orchestrated systemic changes to support student achievement and equity as a Cabinet member, equivalent to Assistant Superintendents in other districts.

Key Accomplishments

- Instituted district Professional Learning Communities (PLCs) utilizing standardized benchmark exams and analysis of student data throughout the district
- Integrated social-emotional learning (SEL) into the school day.
- Developed K-12 alternative programs offering diverse pathways to a high school diploma
- Designed and implemented a 9-12 academy to reengage students
- Designed a grades 6-8 enrichment program, raising math test scores by 5%
- Increased access to standards-based curriculum
- Implemented a career-and-college readiness platform
- Challenged staff assumptions and fostered change.
- Collaborated with the District Attorney's office to create a multi-agency youth diversion program, reducing juvenile justice involvement.
- Developed a working partnership with the Gilroy Police Department
- Participated in multiple district- community partnerships

Principal

Morgan Hill Unified School District (Ann Sobrato High School) 2007-2015
San Benito High School District (Hollister High School) 2004-2007

Built a culture of excellence through increased rigor, high expectations and meaningful engagement.

Key Accomplishments

- Represented the district as a standing member of the negotiating team
- Mentored staff, guiding over 20 staff into leadership roles in teaching and administration.
- Expanded the Agriculture programs, Career-Technical Education (CTE) and Visual and Performing Arts opportunities
- Co-designed a certificated evaluation system aligned with the California Standards for the Teaching Profession
- Chaired expulsion panels for the district
- Transitioned the school to A-G graduation standards, boosting college readiness to 68%
- Increased student achievement
- Designed inclusion programs for all students
- Introduced Equity Walks to ensure equitable experiences for all students.
- Increased Advanced Placement course participation to 75% of students
- Removed tracking in all core areas
- Formed student leadership groups to address bullying and promote diversity awareness
- Collaborated with the League of United Latin American Citizens (LULAC) to support students

C.3. Pilar Vázquez-Vialva, Ed.D — Director IV, SCCOE

DR. PILAR VÁZQUEZ-VIALVA

Contact

480-330-0382
 pilarvazquezvialva@gmail.com
 www.linkedin.com/in/pilarvazquezvialva

Education

Ed.D. Organizational Leadership, (K-12 Emphasis)

Grand Canyon University, 2023
Dissertation: Culturally Responsive Leadership in K-12

M.Ed. Education Administration & Supervision

University of Phoenix, 2006

B.A. Secondary Education - English
 Northeastern Illinois University, 2001

Leadership Strengths

- Visionary & Transformative Leadership
- Strategic Planning & Systems Leadership
- Culturally Responsive Leadership
- Equity-Drive Organizational Change
- Partnership & Relationship Development
- Team Empowerment & Talent Management
- Grant & Fiscal Management
- Inclusive & Wellness-Centered Practices
- Clear, Effective Communication

Languages

English (Fluent)
 Spanish (Conversational)

Profile

Executive educational leader with 25 years of experience advancing equity-centered transformation across education systems and cross-sector partnerships. Proven success designing scalable service and program models, cultivating strategic partnerships, and stewarding \$50M+ in grants and contracts that expand access, sustainability and impact. Expertise in organizational change, wellness-centered systems design, and leadership development with a strong ability to translate field insights into structured frameworks that deepened engagement and extend reach across regions and organizations.

Experience

Director IV, Youth Health and Wellness

Santa Clara County Office of Education, San Jose, California | 2023 - Present

Lead countywide strategy advancing equity-centered youth mental health and wellness across four branches and 45 staff, integrating Community Schools, School Health Systems and Billing, Strategic Initiatives and Wellness Programs into a cohesive service model. Steward \$50M+ in grants and contracts and cultivate cross-agency partnerships that expand sustainable access to student health and wellness supports across the Bay Area.

- Led expansion of a countywide wellness infrastructure, growing a network of 20+ school-based wellness centers increasing access to mental health supports for 25,000+ students and strengthening cross agency coordination and service alignment.
- Cultivated and formalized partnerships with 20+ community organizations to expand coordinated care access and deepen regional collaboration.
- Implemented operational and fiscal system redesigns improving service delivery alignment, resource utilization and scalability.
- Designed and launched a behavioral health billing infrastructure to increase financial sustainability and long-term program viability across school-based services.
- Co-designed and supported the Student Wellness Advisory Group (SWAG), earning a California Golden State Bell Award for elevating youth voice in countywide wellness initiatives.

Assistant Superintendent of Educational Services

Morgan Hill Unified School District, Morgan Hill, California | 2019 – 2023

Served on the Executive Cabinet and led districtwide strategy for instructional leadership, academic services, equity, student wellness, and family and community engagement for 8,200 students across 13 schools.

- Oversaw strategic direction and alignment across instructional, multilingual learner, special education, wellness, and data departments serving districtwide priorities.
- Designed and implemented a comprehensive school-based mental health model integrating prevention, intervention and cross-sector coordination.
- Introduced and scaled the Freshmen Success Program in partnership with the Network for College Success, improving SEL support, summer transition, and on-track rates for 9th graders.
- Led development of a multi-year coherent strategic plan aligning organizational resources, instructional priorities, and system outcomes.

- Streamlined budgeting, evaluation, and data-use processes to strengthen organizational coherence and decision-making capacity.
- Elevated middle and high school student voice by co-designing shared decision model in partnership with National Equity Project BELE Network.

Director of Educational Services

*Metropolitan Education District-Silicon Valley Career Technical Education
San Jose, California | 2016 – 2019*

Served on the Superintendent Cabinet leading Northern California's largest Career Technical Education (CTE) with 22 career pathways. Supervised adult education programs, CTE instruction, curriculum development, accountability, community college partnerships, and multimillion dollar grants.

- Expanded and strengthened college and career readiness initiatives, increasing student enrollment, pathway completers, and higher-education partnerships.
- Led regional collaboration through the Bay Area Community Colleges Consortium, resulting in new dual enrollment courses and articulated pathway agreements.
- Enhanced teacher and school leader capacity through targeted coaching and professional development.
- Oversaw budgets, grants, and program compliance to ensure high-quality industry aligned CTE experiences.

Principal

Chicago Public Schools, Chicago, Illinois | 2013 – 2016

Led a diverse, community high school of 1350 students and 125 staff, driving continuous academic growth and strengthening schoolwide culture, operations, and instructional leadership systems. Improved 9th grade on-track rates by 10%, increased attendance by 4%, expanded early college credentialing from 15% to 43%, and reduced out of school suspensions by 50%.

- Built the capacity of the instructional leadership team and implemented schoolwide systems for curriculum alignment, and instructional rounds.
- Established a Restorative and Wellness Center to support students' diverse social-emotional and mental health needs.
- Strengthened community partnerships for mental health, college access programs, and family engagement.
- Managed multimillion dollar school budgets, created HR systems, redesigned hiring protocols, and oversaw all staffing and personnel processes.

Adjunct Professor | Alder Graduate School of Education

Redwood City, California | 2024 – Present

- Teach the following courses: Identity and Teaching, Multilingual Language Use in the Classroom, and Action Research

Assistant Principal | Glendale Union High School District

Glendale, Arizona | 2007 – 2012

- Led schoolwide instructional systems, student services, and staff evaluation, supported operations, discipline, and teacher development.

English Teacher | Chicago Public Schools & Tempe Union High School District | 2002 – 2007

Additional Leadership Projects

Founder, The SouLuna Project Inc. 501(c)(3), 2024 - Present

- Designed and launched a wellness-centered nonprofit advancing healing, leadership development, and community connection through retreats, facilitation, and workshops.

Founder, Ed Lead Partners LLC, 2017 - Present

- Provide consulting and facilitation to education and community leaders focused on systems transformation, wellness-centered leadership, and organizational culture development.

Certifications

California General Administrative Services

Illinois State Administrative Credential and Secondary Education English Certificate

Arizona Principal and Secondary Education English Certificate

Awards & Professional Affiliations

ACSA Administrator of the Year 2023

Engaging Schools, *Shifting Gears* Book Reviewer 2016

National Equity Project, BELE Network 2021

New Leaders, Cohort 2013

University of Chicago Urban Labs, Community Advisory Member (2014-16)

C.4. David Rehkopf, Ph.D. — Professor, Stanford School Of Medicine

BIOGRAPHICAL SKETCH

NAME: Rehkopf, David Harold

eRA COMMONS USER NAME: rehkdav

POSITION TITLE: Associate Professor

EDUCATION/TRAINING:

INSTITUTION AND LOCATION	DEGREE	Completion Date	FIELD OF STUDY
University of Puget Sound, Tacoma, WA	B.S.	12/1994	Biology
University of California, Berkeley, CA	M.P.H.	05/2001	Epidemiology/Biostatistics
Harvard School of Public Health, Boston, MA	Sc.D.	03/2006	Social Epidemiology
Robert Wood Johnson Foundation Health & Society Scholar, University of California, San Francisco/ Berkeley, CA		08/2008	Population Health

A. Personal Statement

I am currently an Associate Professor (with tenure) at the Stanford University School of Medicine, with a courtesy appointment in Health Research & Policy. I am a member of the Center on Poverty and Inequality, and the Center for Population Health. The aim of my research is to understand the importance of the mechanisms and processes linking socioeconomic disadvantage with adult chronic disease risk and aging. My work integrates statistical and conceptual strengths of public health, economics and advanced epidemiological methods with consideration of the underlying pathobiology of aging and chronic disease. T

I trained in epidemiology and biostatistics at UC Berkeley and Harvard, with a focus in my graduate studies on advanced longitudinal, non-linear and spatial methods of data analysis. The focus of my research fellowship at UC Berkeley and UC San Francisco was on data adaptive methods of analysis as well as fixed effect and instrumental variable models. I have just (2019) completed a five year career development award from the National Institute on Aging, with a focus on how social and physical exposures earlier in the life course impact chronic diseases related to aging.

I am currently Principal Investigator on an R01 from the National Institute on Aging titled *The long-term health effects of the New Deal: An 80 years follow-up of 4 cohorts*. The goal of this project is to examine the effects of new deal employment policies on the long-term health of children whose households and regions benefited from those policies. I am also Principle Investigator on an R21 from the National Institute on Minority Health and Health Disparities titled *Using census data linkages to study long-term impacts on disparities in DNA methylation*. The goal of this project is to examine the effects of new deal employment policies on DNA methylation, and how this may contribute as a biological mechanism underlying health disparities.

1. Adler NE, **Rehkopf DH**. (2008). U.S. disparities in health: descriptions, causes, and mechanisms. *Annual Rev Public Health*, 29: 235-52.
2. Dow WH, **Rehkopf DH**. (2010). Socioeconomic gradients in health in international and historical context. *Annals of the New York Academy of Science* 1186:24-36.
3. **Rehkopf DH**, Modrek S, Cantley L, Cullen M. (2017). Social, psychological, and physical aspects of the work environment could contribute to hypertension prevalence. *Health Affairs* 36: 258-265.
4. **Rehkopf DH**, Adler N, Rowe J. (2017). The impact of health and education on future labour force participation among individuals aged 55-74 in the United States of America: the MacArthur Foundation Research Network on an Aging Society. *Ageing & Society* 37:1313-1337.

B. Positions and Honors**Positions and Employment**

2006	Research Fellow, Harvard School of Public Health, Boston, MA
2008-2010	Adjunct Assistant Professor, Epidemiology & Biostatistics, UC San Francisco
2011-2019	Assistant Professor, Stanford University School of Medicine
2019-	Associate Professor (with tenure), Stanford University School of Medicine

Other Experience and Professional Measurements

2001-	Member, American Public Health Association
2005-	Member, Society for Epidemiologic Research
2006-	Member, Population Association of America
2011-	Affiliate Member, MacArthur Research Network on an Aging Society

Honors

2000	Public Health Trainee Fellowship, University of California, Berkeley
2003	Doctoral exam, pass with honors, Harvard School of Public Health

C. Contribution to Science**1. Data linking and socioeconomic disparities in health.**

As a doctoral student I worked with a research group pioneering the use of area based socioeconomic measures for monitoring health disparities. The work of this group has formed the basis of a large body of work in academia and in the practice of state and county health departments. Within this project, I lead research examining the extent of measurement error of individual characteristics when using area as compared to individual socioeconomic measures. More recently I have extended this work to link contemporaneous cohorts to early life measures and have found small but meaningful relationships between the social and economic characteristics of where individuals live early in life and chronic disease outcomes later in life. This work has advanced science by guiding the use of area based socioeconomic measures for use in monitoring health disparities and in supplementing new area level data to ongoing cohort studies.

- a. Krieger, N, Chen J, Waterman P, Rehkopf DH, Subramanian SV. (2003). Race/ethnicity, gender and monitoring socioeconomic gradients in health: a comparison of area-based socioeconomic measures--The Public Health Disparities Geocoding Project. *American Journal of Public Health* 93: 1655-1671.
- b. Rehkopf DH, Haughton LT, Chen JT, Waterman PD, Subramanian SV, Krieger N. (2006). Monitoring socioeconomic disparities in death: comparing individual-level education and area-based socioeconomic measures. *American Journal of Public Health* 96: 2135-2138.
- c. Chen, JT, Rehkopf DH, Waterman P, Subramanian SV, Coull B, Cohen B, Ostrom M, Krieger N. (2006). Mapping and measuring social disparities in premature mortality: the impact of census tract poverty within and across Boston neighborhoods, 1999-2001. *Journal of Urban Health* 83: 1063-1084.
- d. Rehkopf DH, Eisen E, Modrek S, Moky Horner E, Goldstein B, Costello S, Cantley L, Slade M, Cullen M (2015). Early life state of residence characteristics and later life hypertension, diabetes and ischemic heart disease. *American Journal of Public Health* 105: 1689-1695.

2. Comprehensive descriptions of social inequalities in health.

I have lead work to describe in more detail the ways in which income is related to risk factors for disease, and applied novel machine learning methods to rank the importance of social, economic, behavioral and biological factors for predicting health risks. This work has two fundamental contributions to advancing our understanding of income differences in health. First, this work has clarified that these income differences are specific to time, place and outcome examined. The fact that not all risk factors for disease are associated with income differences helps to clarify which causes may be most responsible for income differences in health and which are not. Secondly, my work has clarified that complementary approaches to the use of traditional regression models examining one outcome at a time may be beneficial for understanding determinants of health. This includes models that account for higher order interactions between variables as well as approaches for accounting for examining multiple outcomes with a single exposure variable.

- a. Rehkopf DH, Krieger N, Coull B, Berkman L. (2010). Biological Risk Markers for Coronary Heart Disease: Nonlinear Associations With Income. *Epidemiology* 21:38-46.
- b. Rehkopf DH, Dow WH, Rosero-Bixby L. (2010). Differences in the association of cardiovascular risk factors with education: a comparison of Costa Rica (CRELES) and the United States (NHANES). *Journal of Epidemiology and Community Health* 64: 821-828.
- c. Patel, C. J., Ioannidis, J. P., Cullen, M. R., & Rehkopf, D. H. (2015). Systematic Assessment of the Correlations of Household Income With Infectious, Biochemical, Physiological, and Environmental Factors in the United States, 1999–2006. *American journal of epidemiology*, kwu277.
- d. Rehkopf DH, Laraia BA, Segal M, Braithwaite A, Eppel ES. (2011). The relative importance of predictors of BMI change, overweight and obesity in adolescent girls. *International Journal of Pediatric Obesity* 6:e233-42.

3. Income Policy and healthy aging.

I have lead approaches that use quasi-experimental approaches to understand the ways in which income and earnings affect health risks. First, I have lead a number of studies examining the impact of the Earned Income Tax Credit on health. This is the largest anti-poverty program in United States, but prior to my work there was very little examination of the health impacts of this program. My work in this area uses temporal and spatial differences in the generosity of the credit in order to identify the effects of the program and the effects of poverty reduction. The impact on science has been establishing stronger evidence that there is a causal connection between poverty and poor health, and that this relationship is not solely due to selection or the effects of health on earnings. I also am the co-lead of a study examining the effects of paying a living wage to factory workers in the Dominican Republic. Through new primary data collection we are evaluating the health effects of a factory that had a 3.5-fold increase in wages. This also represents an evaluation of an actual private sector policy, the results from which have clear implications for what actions can be taken to improve health through addressing social determinants of disease.

- a. Landefeld, J. C., Burmaster, K. B., Rehkopf, D. H., Syme, S. L., Lahiff, M., Adler-Milstein, S., & Fernald, L. C. (2014). The association between a living wage and subjective social status and self-rated health: A quasi-experimental study in the Dominican Republic. *Social Science & Medicine*, 121, 91-97.
- b. Strully K, Rehkopf DH, Xuan Z. (2010). Liberal welfare state policies and health: the effect of the earned income tax credit on child well-being. *American Sociology Review* 75: 534-562.
- c. Bruckner T, Rehkopf DH, Catalano R. (2013). Income Gains and Very Low Weight Birth among Low-income Black Mothers in California. *Biodemography and Social Biology* 59:141-56.
- d. Rehkopf, D. H., Strully, K. W., & Dow, W. H. (2014). The short-term impacts of Earned Income Tax Credit disbursement on health. *International journal of epidemiology*, dyu172.

4. Life course determinants of chronic disease risk.

I have lead multiple analyses examining how early life social position and social position across generations effects long-term chronic disease. Much of this work has specifically focused on the weight gain during pregnancy as a potential mediator of maternal and offspring long term health. Work in this later domain was all done in close collaboration with Barbara Abrams. We have also added a survey instrument on Adverse Childhood Experiences (ACE) to the National Longitudinal Survey of Youth (NLSY) to examine how ACEs impact maternal health and the subsequent health of their children.

- a. Chaffee, B. W., Abrams, B., Cohen, A. K., & Rehkopf, D. H. (2015). Socioeconomic disadvantage in childhood as a predictor of excessive gestational weight gain and obesity in midlife adulthood. *Emerging themes in epidemiology*, 12(1), 4.
- b. Robinson CA, Cohen AK, Rehkopf DH, Deardorff J, Ritchie L, Jayaweera RT, Coyle JR, Abrams B. (2014). Pregnancy and post-delivery maternal weight changes and overweight in preschool children. *Preventative Medicine*; 60:77-82.
- c. Rehkopf DH, Headen I, Coyle J, Hubbard A, Deardorff J, Kesavan Y, Cohen A, Patil D, Ritchie L, Abrams B (2016). Adverse childhood experiences and later life adult obesity and smoking in the United States. *Annals of Epidemiology* 26: 488-492.
- d. Zilko, C. E. M., Rehkopf, D., & Abrams, B. (2010). Association of maternal gestational weight gain with short-and long-term maternal and child health outcomes. *American journal of obstetrics and gynecology*, 202(6), 574-e1.

5. Biological pathways of aging.

I have lead work to examine the underlying biological pathways of aging, and how these develop over the life course. Initially this work has focused on telomere length as an indicator of aging, with more recent ongoing work expanding into DNA methylation as a potential mechanism. The scientific contribution of this work is to understand how social environments and life course exposures become embodied to cause socioeconomic differentials in health in later life. The impact of this work is for gaining a more accurate estimate of the amount of health variation that is caused by differences in the environment, as well as to inform the approaches by which we can estimate these environmental impacts.

- a. Rehkopf DH, Dow WH, Rosero-Bixby L, Lin J, Epel E, Blackburn EH. (2014). Seasonal variation of peripheral blood leukocyte telomere length in Costa Rica: a population based observational study. *American Journal of Human Biology* 26:367-75.
- b. Rehkopf DH, Dow W, Rosero-Bixby L, Lin J, Epel E, Blackburn E. (2013). Longer leukocyte telomere length in Costa Rica's Nicoyan Peninsula: A population based study. *Experimental Gerontology* 48:1266-73.
- c. Needham, B. L., Adler, N., Gregorich, S., Rehkopf, D., Lin, J., Blackburn, E. H., & Epel, E. S. (2013). Socioeconomic status, health behavior, and leukocyte telomere length in the National Health and Nutrition Examination Survey, 1999–2002. *Social science & medicine*, 85, 1-8.
- d. McEwen LM, Morin AM, Edgar RD, MacIsaac JL, Jones MJ, Dow WH, Rosero-Bixby L, Kobor M, Rehkopf DH (2017). Differential DNA methylation and lymphocyte proportions in a Costa Rican high longevity region. *Epigenetics Chromatin* 10:21.

Complete List of Published Work in MyBibliography:

<http://www.ncbi.nlm.nih.gov/sites/myncbi/1XYn9nJx4605w/bibliography/47899074/public/?sort=date&direction=ascending>

D. Research Support

U54 MD010724 Cullen/Maldonado (PI)
NIH/NIMHD

04/01/2016-03/31/2021

Stanford Precision Health for Ethnic and Racial Equality (SPHERE)

The Stanford Precision Health Equity in Race and Ethnicity (SPHERE) Center will explore how genetic and other biologic differences can be identified and applied to narrow enormous social and economic disparities at a time when more affluent members of society are increasingly taking advantage of advanced technologies.
Role: Co-Investigator

R01 AG026291 Cullen (PI)
NIH/NIA

07/01/2016-06/30/2021

Disease, disability and death in the aging workforce

The goal is to describe the covariance of chronic disease health outcomes with industrial plant and region specific social and economic exposures, and more precisely assess the association of contextual variables with health outcomes. I lead aspects of the project related to measuring social and economic exposures over the life course in relation to chronic disease outcomes.
Role: Co-Investigator

R01 MD011721 Needham/Rehkopf (PI)
NIH/NIMHD

08/16/2017-05/31/2022

Race/Ethnicity, DNA Methylation, and Disparities in Cardiovascular Mortality: NHANES 1999-2002

US blacks are more likely to die from cardiovascular disease (CVD) than US whites. This study will help determine whether black/white differences in DNA methylation help explain why blacks are more likely than whites to die from CVD. Because DNA methylation is potentially modifiable, results from this work could be used to develop interventions to improve cardiovascular health and reduce disparities in cardiovascular death.
Role: PI

R01 HD090014 Osypuk (PI) 09/19/2017-05/31/2021
NIH/NICHD

Health, Neighborhood Context, and Mobility

This project will test whether health-related barriers to employment mediate and moderate the effects of a social experiment of housing and neighborhood relocation on economic mobility, among adolescents, young adults, and their mothers. This knowledge will inform the next generation of social policy, e.g., to provide guidance on augmenting housing counseling assistance services to include health-related additional program supports and cross-sectoral services (e.g. health management or substance use treatment services) for vulnerable families.

Role: Co-Investigator

SLOAN 57424000 (Modrek, PI) 04/01/2018-08/31/2019
Alfred P. Sloan Foundation

The intergenerational effects of the Works Progress Administration on Disability and Retirement outcomes

The goal of this project is to understand the impact of the generosity of Works Progress Administration spending for households and how that impacted the later life disability and retirement outcomes for children living in those households

Role: Co-Investigator

HRTFRD (Rowe, PI) 01/01/2019 – 09/30/2019
Hartford Foundation/Columbia University

State based differences in the well-being of older persons and their relation to aging related supports and services

We will conduct a State based analysis of differences in the health of older persons as well as the policies and programs relevant to their well-being. The result will be an evidence-based metric of the relative degree to which individual States are prepared to support their current and future populations of older persons across a variety of domains including economic security, access and quality of health care, societal cohesion and social supports and engagement and productivity.

Role: Co-investigator

R21 MD013296-01 (Rehkopf/Assimes, PI) 07/01/2018-06/30/2020
NIH/NIMHD

Using census data linkages to study long-term impacts on disparities in DNA methylation

The goal of this project is to examine the effects of new deal employment policies on DNA methylation, and how this may contribute as a biological mechanism underlying health disparities.

Role: Principal Investigator

R01 AG05971 (Rehkopf/Modrek, PI) 04/01/2019-03/30/2024
NIH/NIA

The long-term health effects of the New Deal: An 80 years follow-up of 4 cohorts

The goal of this project is to examine the effects of new deal employment policies on the long-term health of children whose households and regions benefited from those policies.

Role: Principal Investigator

75917 (Singer, PI) 12/01/2018-11/30/2020
The Robert Wood Johnson Foundation

Corporations and Public Health

Major Goals: Collect information on all shareholder proposals submitted at publicly traded companies in the United States between 2013 and 2018 that are related to public health concerns and categorize whether these shareholder proposals were directed towards actions that primarily focused on benefits to (1) firm employees, (2) customers of the firm, or (3) the general public in order to stimulate ideas around innovative company responses to public health concerns

Role: Co-Investigator

SOCIAL SECURITY ADMINISTRATION (Rehkopf, PI)

05/04/2018-05/03/2019

Working trajectories, health, and patterns of disability and retirement.

The goal of this project is to investigate the role of health in the relationship between working trajectories and retirement age through the construction of detailed health trajectories of a cohort of workers over many years.

Role: Co-Investigator

C.5. Ben Domingue, Ph.D. — Professor, Stanford School Of Education

Benjamin W Domingue
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CERAS Rm 510

520 Galvez Mall
Stanford CA 94305

Research Interests

Psychometrics, Sociogenomics, Quantitative methods

Positions

- Assistant Professor 9/2015–Present
Graduate School of Education, Stanford University
- Research Associate 6/2012–Present
Institute of Behavioral Science, University of Colorado Boulder
- Visiting Researcher 9/2014–5/2015
Population Research Center, The University of Texas at Austin
- Visiting Scholar 9/2013–12/2013
Colombian Institute for the Evaluation of Education (ICFES)
- Graduate Research Assistant 8/2007–5/2012
School of Education & Institute of Behavioral Science, University of Colorado Boulder
- Teacher 8/2006–5/2007
Crested Butte Academy

Other Affiliations

- Assistant Professor (by courtesy), Stanford Department of Sociology, 2018–
- Steering Committee, Stanford Center for Education Policy Analysis, 2017–
- Faculty Fellow, Stanford Population Health Sciences, 2017–
- Research Associate, University of Colorado Institute of Behavioral Science, 2012–

Awards

- 2013 American Educational Research Association Division D (Measurement and Research Methodology) Quantitative Dissertation Award.

Education

- PhD – University of Colorado at Boulder, Education [Advisor: Derek Briggs] 2012
- MA – University of Texas at Austin, Mathematics [Advisor: P. Uri Treisman] 2006
- BS – University of Texas at Austin, Mathematics 2001

Grants

- Sociogenomics at Stanford
Co-PI (PI: Jeremy Freese), IRiSS Faculty Seed Grant [\$25,000]
- Sociogenomics in the WLS: Probing Questions of Validity Regarding the Genetics of Educational Attainment and Subsequent Occupational and Economic Attainments
PI, Russell Sage Foundation [\$93,264]
- NIA Network on Life Course Health Dynamics and Disparities in 21st Century America Pilot Research Grant, Building a Data Resource to Test for Increasing Selectivity of Persons at the Low End of the Educational Continuum: Harmonizing Measures in the National Longitudinal Study of Adolescent to Adult

Health and the Health and Retirement Study

Co-I (PI: Dan Belsky), NIA (Parent Grant: R24AG045061) [\$12,500]

- Quantifying Individual Genetic Risk in Diverse Populations

Co-PI (PI: Laramie Duncan), 2017 Spectrum Pilot Grant for Population Health Sciences [\$26,000]

- On the Use of Genetic Data in Social Science Inquiry: Applications and Methodological Considerations with a Focus on UK and European Datasets

Co-Investigator (PI: Melinda Mills), NCRM International Visitor Exchange Scheme [\$5,374]

- Psychometric considerations of item quality in a digitally mediated learning environment
PI, Spencer Foundation [\$50,000]

- Curating NHANES Genetic Data for Sociogenomic Modeling

Co-I (PI: David Rehkopf), Stanford Center for Clinical and Translational Research and Education (SPECTRUM) Pilot Grant [\$19,500]

- Using Structural Differences across Environments to Understand Gene-Environment Correlations and their Implications for Gene-by-Environment Research

PI, University of Colorado Population Center Developmental Grant [\$3,000]

- The Social and Genetic Epidemiology of Health Behaviors: An Integrated Approach

MPI w/ Jason Boardman, NIH Exploratory/Developmental Research Grant Award (R21) 1R21HD078031-01 [\$305,000]

Papers

Notational Conventions

†: Student/postdoctoral collaborators with whom I engaged extensively during course of project.

‡: Paper on which I acted as a senior author.

- : Joint authorship.

Peer-Reviewed Articles

1. Martschenko D†•, Trejo S†•, & **Domingue B†•**. (In Press). Genetics and Education: Recent developments in the context of an ugly history and an uncertain future. *AERA Open socArXiv* doi: 10.31235/osf.io/74b8m
2. Walters RK, ..., **Domingue B**, ..., Agrawal A. (In Press). Trans-ancestral GWAS of alcohol dependence reveals common genetic underpinnings with psychiatric disorders. *Nature Neuroscience bioRxiv*. doi: 10.1101/257311
3. Conley D, Laidley T, **Domingue B**, Sinsub P, Harris KM. (In Press). New evidence of skin color bias and health outcomes using sibling difference models: A research note. *Demography*.
4. Hussain SF†, **Domingue B**, LaFramboise T, Ruedas-Gracia N. (2018). Conceptualizing School Belongingness in Native Youth: Factor Analysis of the Psychological Sense of School Membership Scale. *American Indian and Alaska Native Mental Health Research*. 25 (3). doi: 10.5820/aian.2503.2018.26
5. Sheehan C†, **Domingue B**, Crimmins E. (2018). Cohort Trends in the Gender Distribution of Household Tasks in the United States and the Implications for Understanding Disability. *Journal of Aging and Health*. doi: 10.1177/0898264318793469
6. Trejo S†, Belsky DW, Boardman JD, Freese J, Harris KM, Herd P, Sicinski K, **Domingue B†**. (2018). Schools as moderators of genetic associations with lifecourse attainments: Evidence from the WLS and Add Heath. *Sociological Science*. doi: 10.15195/v5.a22
7. Lawrence E, Hummer R, **Domingue B**, Harris KM. (2018). Wide Educational Disparities in Young Adult Cardiovascular Health. *SSM - Population Health*. doi: 10.1016/j.ssmph.2018.07.006

8. Wedow R†, Zacher M†, Huibregtse B, Harris KM, **Domingue B†**, Boardman JD. (2018). Education, smoking, and cohort change: Forwarding a multidimensional theory of the environmental moderation of genetic effects. *American Sociological Review*. 83, 4.
doi: 10.1177/0003122418785368
9. Belsky DW•, **Domingue B•**, Wedow R†, Arseneault L, Boardman JD, Caspi A, Conley D, Fletcher JM, Freese J, Herd P, Moffitt TE, Poulton R, Sicinski K, Wertz J, Harris KM. (2018). Genetic analysis of social-class mobility in five longitudinal studies. *Proceedings of the National Academy of Sciences*
doi: 10.1073/pnas.1801238115
10. Gaydos L, Belsky D, **Domingue B**, Boardman JD, Harris KM. (2018). Father absence and accelerated reproductive development in non-Hispanic white women in the United States. *Demography*.
bioRxiv. doi: 10.1101/123711
doi: 10.1007/s1352
11. Conley D, Johnson R, **Domingue B**, Dawes C, Boardman J, Siegal M. (2018). Family-based association analysis identifies variance-controlling loci without confounding by genotype-environment correlations. *PLOS One*.
doi: 10.1371/journal.pone.0194541
bioRxiv. doi: 10.1101/175596
12. **Domingue B**, Rehkopf DH, Conley D, Boardman JD. (2018). Geographic clustering of polygenic scores at different stages of the life course. *RSF: The Russell Sage Foundation Journal of the Social Sciences*.
doi: 10.7758/RSF.2018.4.4.08
13. **Domingue B**, Belsky D, Fletcher J, Conley D, Boardman J, Harris KM. (2018). The social genome of friends and schoolmates in the National Longitudinal Study of Adolescent to Adult Health *Proceedings of the National Academy of Sciences*
doi: 10.1073/pnas.1711803115
bioRxiv. doi: 10.1101/107045
14. Wehby G, **Domingue B**, Wolinsky F. (2017). Genetic Risks for Chronic Conditions: Implications for Long-Term Wellbeing. *Journal of Gerontology: Series A*.
doi: 10.1093/gerona/glx154
15. Wehby G, **Domingue B**, Ullrich F, Wolinsky F. (2017). Genetic Predisposition to Obesity and Medicare Expenditures. *The Journals of Gerontology, Series A*.
doi: 10.1093/gerona/glx062
16. Alzen J†, Fahle E†, **Domingue B †**. (2017). The implications of reduced testing for teacher accountability. *AERA Open*.
doi: 10.1177/2332858417704411
17. **Domingue B**, Belsky DW, Harrati A, Conley D, Weir D, Boardman J. (2017). Mortality Selection in a Genetic Sample and Implications for Association Studies. *The International Journal of Epidemiology*.
doi: 10.1093/ije/dyx041
bioRxiv, doi: 10.1101/049635
18. **Domingue B**, Liu H, Okbay A, Belsky D. (2017). Genetic heterogeneity in depressive symptoms following the death of a spouse: Polygenic score analysis of the US Health and Retirement Study. *The American Journal of Psychiatry*.
doi: 10.1176/appi.ajp.2017.16111209
bioRxiv, doi: 10.1101/065847
19. **Domingue B**, Lang D†, Cuevas ML, Castellanos M, Lopera C, Marino JP, Molina A, Shavelson R. (2017). Measuring student learning in technical programs: A case study from Colombia. *AERA Open*.
doi: 10.1177/2332858417692997
20. Conley D, Laidley T, Boardman J, **Domingue B†**. (2016). Changing Polygenic Penetrance on Phenotypes in the 20 th Century Among Adults in the US Population. *Scientific Reports*.
doi: 10.1038/srep30348
21. Conley D, **Domingue B**. (2016). The Bell Curve Revisited: Testing Controversial Hypotheses with Molecular Genetic Data. *Sociological Science*.

- doi: 10.15195/v3.a23
22. Conley D, Laidley T, Belsky D, Fletcher J, Boardman J, **Domingue B**†. (2016). Assortative mating and differential fertility by phenotype and genotype across the 20th century. *Proceedings of the National Academy of Sciences*.
doi: 10.1073/pnas.1523592113
 23. Belsky DW, Moffitt TE, Corcoran DL, **Domingue B**, Harrington HL, Hogan S, Houts R, Ramrakha S, Sugden K, Williams B, Poulton R, Caspi A. (2016). The genetics of success: How SNPs associated with educational attainment relate to life course development. *Psychological Science*.
doi: 10.1177/0956797616643070
 24. Shavelson RJ, **Domingue B**, Marino J, Mantilla AM, Morales JA, Wiley, E. (2016). On the Practices and Challenges of Measuring Higher Education Value Added: The Case of Colombia. *Assessment and Evaluation in Higher Education*.
doi:10.1080/02602938.2016.1168772
 25. Rehkopf D, **Domingue B**, Cullen M. (2016). Gene-environment correlation: the geographic distribution of genetic risk for chronic disease in the United States. *Biodemography and Social Biology*. 62(1), 126-142.
doi: 10.1080/19485565.2016.1141353
 26. **Domingue B**, Wedow R†, Conley D, McQueen M, Hoffman T, Boardman J. (2016). Genome-wide estimates of heritability for social demographic outcomes. *Biodemography and Social Biology*. 62(1), 1-16.
doi: 10.1080/19485565.2015.1068106
 27. Bohr AD, Boardman JD, **Domingue B**, McQueen M. (2015). Breastfeeding is associated with waist-to-height ratio in young adults. *BMC Public Health*. 15:1281.
doi: 10.1186/s12889-015-2611-7
 28. **Domingue B**, Belsky D, Conley D, Harris, KM, Boardman JD. (2015). Polygenic Influence on Educational Attainment: New evidence from The National Longitudinal Study of Adolescent to Adult Health. *AERA Open*.
doi: 10.1177/2332858415599972
 29. **Domingue B**, Conley D, Fletcher J, Boardman J. (2015). Cohort effects in the genetic influence on smoking. *Behavior Genetics*. 46, 31-42.
doi: 10.1007/s10519-015-9731-9
 30. Wehby GL, **Domingue B**, Boardman J. (2015). Preventions, use of health services, and genes: Implications of genetics for policy formation. *Journal of Policy Analysis and Management*.
doi: 10.1002/pam.21835
 31. Conley D, **Domingue B**, Cesarini D, Dawes C, Rietveld CA, Boardman JD. (2015). Is the effect of parental education on offspring biased or moderated by genotype? *Sociological Science*.
doi: 10.15195/v2.a6
 32. McQueen MB, Boardman JD, **Domingue B**, Smolen A, Tabor J, Killea-Jones L, Halpern CT, Whitsel EA, Harris KM. (2014). The National Longitudinal Study of Adolescent Health (Add Health) Sibling Pairs Genome-Wide Data. *Behavior Genetics*.
doi: 10.1007/s10519-014-9692-4
 33. Cornelius AR, Conley D, Eriksson N, Esko T, Medland SE, Vinkhuyzen AAE, Yang J, Boardman JD, Chabris C, Dawes CT, **Domingue B**, Hinds DA, Johannesson M, Kiefer AK, Laibson D, Magnusson PKE, Mountain JL, Oskarsson S, Teumer A, Tung JY, Visscher PM, Benjamin DJ, Cesarini D, Koellinger PD, and the Social Science Genetics Association Consortium. (2014). Replicability and Robustness of GWAS for Behavioral Traits. *Psychological Science*.
doi: 10.1177/0956797614545132
 34. Boardman JD, **Domingue B**, Daw J. (2014). What can genes tell us about the causal relationship between education and health? *Social Science and Medicine*.
doi: 10.1016/j.socscimed.2014.08.001
 35. **Domingue B**, Belsky DW, Harris KM, Smolen A, McQueen MB, and Boardman JD. (2014). Polygenic

- Risk Predicts Obesity in Both White and Black Young Adults. *PLOS ONE*.
doi: 10.1371/journal.pone.0101596
36. Mollborn S, **Domingue B**, and Boardman J. (2014). Racial, Socioeconomic, and Religious Influences on School-Level Teen Pregnancy Norms and Behaviors. *Social Forces*.
doi: 10.1093/sf/sou063
 37. **Domingue B**, Fletcher J, Conley D, Boardman J. (2014). Genetic and educational assortative mating among US adults. *Proceedings of the National Academy of Sciences*.
doi: 10.1073/pnas.1321426111
 38. Conley D, Siegal M, **Domingue B**, Harris K, McQueen M, Boardman J. (2014). Testing the Key Assumption of Heritability Estimates Based on Genome-wide Genetic Relatedness. *Journal of Human Genetics*.
doi: 10.1038/jhg.2014.14
 39. Mollborn S, **Domingue B**, and Boardman J. (2014). Understanding Multiple Levels of Norms about Teen Pregnancy and Their Relationships to Teens Sexual Behaviors. *Advances in Life Course Research*.
doi: 10.1016/j.alcr.2013.12.004
 40. Briggs D and **Domingue B**. (2013). The Gains from Vertical Scaling. *Journal of Educational and Behavioral Statistics*, 38(6), 551-576.
doi: 10.3102/1076998613508317
 41. Boardman JD, **Domingue B**, Blalock CL, Haberstick BC, Harris KM, and McQueen MB. (2013). Is the gene-environment interaction paradigm relevant to genome-wide studies? The case of education and body mass index. *Demography*, 51 (1), p. 119-139.
doi: 10.1007/s13524-013-0259-4
 42. **Domingue B**. (2013). Evaluating the Equal-Interval Hypothesis with Test Score Scales. *Psychometrika*.
doi: 10.1007/s11336-013-9342-4
 43. Boardman J, **Domingue B**, and Fletcher J. (2012). How social and genetic factors predict friendship networks. *Proceedings of the National Academy of Sciences*.
doi: 10.1073/pnas.1208975109
 44. Boardman J., Roettger ME, **Domingue B**, McQueen MB, Haberstick BC, and Harris KM. (2012). Gene-environment interactions related to body mass: School policies and social context as environmental moderators. *Journal of Theoretical Politics*, 24(3): 370-388.
doi: 10.1177/0951629812437751
 45. Boardman J, Blalock CL, Corley RP, Stallings MC, **Domingue B**, McQueen MB, Crowley TJ, Hewitt JK, Lue Y, & Field SH (2010). Ethnicity, Body Mass, and Genome-Wide Data. *Biodemography and Social Biology*. 56 (2). p. 123–136.
doi: 10.1080/19485565.2010.524589
 46. **Domingue B** & Briggs D. (2009). Using Linear Regression and Propensity Score Matching to Estimate the Effect of Coaching on the SAT. *Multiple Linear Regression Viewpoints*, 35 (1). p. 12-29.
- Other Peer-Reviewed Publications (Editorials, book chapters, conference proceedings)**
47. Lang D†, Kindel A, **Domingue B**, Paepcke A. (2017). Making the Grade: How Passing a Course Affects Learner Engagement. *Proceedings of the 10th International Conference on Educational Data Mining*.
[link](#)
 48. **Domingue B** and Belsky D. (2017). The Social Genome: Current Findings and Implications for the Study of Human Genetics. *PLOS Genetics*.
doi: 10.1371/journal.pgen.1006615
 49. Briggs D and **Domingue B**. (2014) Value-added to what? The paradox of multidimensionality. Lissitz R & Jiao H (eds.), *Value-added Modeling and Growth Modeling with Particular Application to Teacher and School Effectiveness*. Charlotte, NC: Information Age Publishing.
doi: 10.13140/2.1.1130.6565

Technical Reports, Preprints, etc.

50. Duncan L, Shen H, Gelaye B, Ressler K, Feldman M, Peterson R, **Domingue B.** (2018). Analysis of Polygenic Score Usage and Performance across Diverse Human Populations. *bioRxiv*
doi: 10.1101/398396
51. Belsky DW, Caspi A, Arseneault L, Corcoran D, **Domingue B**, Harris KM, Houts R, Mill J, Moffitt TE, Prinz J, Sugden K, Wertz J, Williams B, Odgers C. (2018). Genetics & the Geography of Health, Behavior, and Attainment. *bioRxiv*
doi: 10.1101/376897
52. Cantu P†, Sheehan CM†, **Domingue B.** (2016). A broad sense measure of health and its properties in the HRS. *bioRxiv*.
doi: 10.1101/081232
53. **Domingue B**, Boardman J. (2016). Using Genome Wide Estimates of Heritability to Examine the Relevance of Gene-Environment Interplay. *bioRxiv*.
doi: 10.1101/037861
54. **Domingue B**, Dimitrov D. (2015). A Comparison of IRT Theta Estimates and Delta Scores From the Perspective of Additive Conjoint Measurement. National Center for Assessment in Higher Education. Riyadh, Saudi Arabia.
55. **Domingue B**, Fletcher J, Conley D, Boardman J. (2014). Reply to Zeitsch et al: Interpreting GAM. *Proceedings of the National Academy of Sciences*.
doi: 10.1073/pnas.1413105111
56. **Domingue B.** (2013). Editorial (on cover art). Educational Measurement: Issues and Practice.
doi: 10.1111/emip.12006
57. Alzen J† and **Domingue B.** (2013). A characterization of sorting and implications for value-added estimates. ERIC Number: ED545383.
58. Briggs D & **Domingue B.** (2011). Due Diligence and the Evaluation of Teachers: A review of the value-added analysis underlying the effectiveness rankings of Los Angeles Unified School District teachers by the Los Angeles Times. Boulder, CO: National Education Policy Center. ERIC Number: ED516008. [link](#)
59. **Domingue B**, Thomas S, Circi R, & Camilli G. (2011). Comment on "Schools and Inequality: A Multilevel Analysis of Coleman's Equality of Educational Opportunity Data". *Teachers College Record*, Number 16544.

Teaching & Mentorship

Classes

- Stanford University
 - Education 339: Advanced Topics in Quantitative Policy Analysis (Fall 2018).
 - Education 252: Introduction to Test Theory (Fall 2015, Fall 2016, Winter 2018).
 - Education 252L: Introduction to Test Theory Lab (Fall 2016, Winter 2018).
 - Education 353A: Problems in Measurement: Item Response Theory (Spring 2016).
 - Education 373: Genetics and Society (Spring 2017; also Soc232/Humbio158S).
- University of Colorado Boulder
 - Education 4716: Basic statistical methods (Fall 2009)
 - Supervised a group of 5 student teachers in the Boulder Valley School District (Fall 2007).
- High School Teacher: Precalculus, Calculus, Physics (Crested Butte Academy, 2006-2007).

Dissertation Committee Membership

- Daniel Greene, Jing Liu, Erin Fahle, Jenna Finch, Joseph Townsend, Christopher Candelaria, Ben Shear, Elisa Garcia, Sid Krishna-Kumar

External Committee Membership

- Xuejie Ding, Oxford Sociology; Maximilian Stiefel, UCSB Geography

Talks

Recorded versions of talks can be found [here](#)

Invited talks

- 2018: Division of Public Health, College of Human Medicine, Michigan State University; Stanford Classes without Quizzes; Geriatric Psychiatry and Neuroscience Grand Rounds, Stanford Medicine, Department of Psychiatry and Behavioral Sciences; University of California Berkeley, Graduate School of Education Colloquium; Stanford BIO-X
- 2017: Duke Population Research Center; Stanford Center for Education Policy Analysis; Broad Online Journal Club; Feldman Lab; Stanford Center for Computational, Evolutionary, and Human Genomic Symposium; Oxford Sociology; University of North Carolina Population Center
- 2016: Pritchard Lab; Stanford SCOPE; USC Population Center; Stanford Gardner Center; Berkeley Center on the Economics and Demography of Aging, Genes and Complex Human Phenotypes Workshop; Russell Sage Foundation; Add Health User's Conference; Integrating biology and the social sciences: Challenges and opportunities, El Colegio de Mexico; Demography Seminar, University of Wisconsin; Conference on Genetics and Social Science, Human capital and economic opportunity global working group; Biomarker Network Meeting
- 2015: Berkeley BEAR Center; University of Iowa College of Public Health; Stanford Graduate School of Education; University of Colorado Boulder School of Education
- 2014: Harvard Graduate School of Education
- 2013: The Fourth Annual Seminario Internacional de Investigación sobre Calidad de la Educación (Bogotá, Colombia)

Talks & Posters at Annual Meetings

Eastern Sociological Society; Interdisciplinary Association for Population Health Science, Behavior Genetics Association, Society of Research on Child Development, National Council on Measurement in Education, American Educational Research Association, Population Association of America, American Sociological Association, Integrating Genetics and the Social Science, International Meeting of the Psychometric Society

Service

Editorial Duties

- AERA Open Editorial Board, 1/2017-present
- PLOS Genetics (Guest Associate Editor)

Ad Hoc Review

- Grant Proposals: NSF; NIH; MQ: Transforming mental health; Stanford Population Health Sciences, Spectrum Pilot Grants, TELOS: Technology for Equity in Learning Opportunities
- Journals: Journal of Gerontology: Social Sciences; Scientific Reports; Developmental Psychology; Journal of Health and Social Behavior; Psychological Science; American Journal of Public Health; Proceedings of the National Academy of Sciences; Social Science and Medicine; JAMA Psychiatry; Journal of Learning Analytics; Journal of Educational Data Mining; Sociology Compass; Nature Human Behaviour; American Sociological Review; Review of Education; Social Forces; Psychometrika; Journal of Marriage and Family; AERA Open; Journal of the European Economic Association; PLOS Genetics; Behavior Genetics; Journal of Educational Measurement; Biodemography and Social Biology; Educational Researcher; Journal of Educational and Behavioral Statistics; Educational Measurement: Issues and Practice; African Educational Research Journal; Assessment in Education: Principles, Policy & Practice; BMC Public Health; Education Policy Analysis Archives; Educational Policy
- Conferences: SREE Conference; NCME Conference; L@S (Learning at Scale); Population Association of America; International Objective Measurement Workshop (IOMW); Interdisciplinary Association for Population Health Science (IAPHS)

Training

- Instructor, University of Michigan Genomics for Social Scientists Workshop, 2018
- Instructor, Oxford NCRM Summer School: An introduction to combining social science and molecular genetic research, 2017
- Instructor, Genome-wide data, Summer Workshop, El Colegio de México 2016
- Instructor, Genome-wide genetic risk score construction, IGSS 2015
- Instructor, A workshop in genome-wide data: Concepts and tools for the population sciences, University of Texas Population Research Center, 2015
- Instructor, A workshop in genome-wide data, University of Iowa College of Public Health, 2015
- Assistant Instructor, IRT-Based Test Linking in R, Training Session at 2013 NCME meeting
- Webcast Moderator, IRT-Based Test Linking in R, Training Session at 2012 NCME meeting

Other

- Visuals Editor, Educational Measurement: Issues and Practice, 2013

Consulting

- | | |
|--|-----------------|
| • Psychometrics consulting for CSPA. | 2018– |
| • Psychometrics consulting for Literably. | 2017– |
| • Psychometrics consulting for TrueSkills. | 2015 |
| • Evaluation of test score scale in Saudi Arabia. | 2015 |
| • Effect of test preparation in Colombia. | 2014 |
| • Replication of Teacher MGPs in Hawaii. | 2014 |
| • Teacher Effectiveness in Denver Public Schools. | 2012–2013, 2015 |
| • University Effectiveness in Colombia. | 2012–2014 |
| • School Effectiveness in Wyoming. | 2012–2013 |
| • Time Series Modeling for Northfield Trading. | 2012 |
| • Analysis and Software Development for the Center for Assessment. | 2011–2012 |
| • School Effectiveness in Hawaii. | 2010–2012 |
| • Survey Analysis for Alta Colleges. | 2008–2009 |

C.6. Joshua Arnold, Ed.D. — Co-Founder & Co-CEO, Impacter Pathway

JOSHUA ARNOLD, Ed.D.

Co-Founder & Co-CEO | IMPACTER Pathway (Impacter Education Corp)

josh@impacterpathway.com
949) 656-3673 | California

PROFESSIONAL SUMMARY

Education executive and EdTech founder with 20+ years spanning classroom teaching, school leadership, district administration, and superintendent roles. Co-founded IMPACTER Pathway, a human skills analytics platform measuring student growth through authentic voice (spoken and written language) and rubric-aligned scoring. Track record of leading equity-centered improvement initiatives, strengthening instructional systems, advancing assessment and curriculum strategy, and executing complex, high-stakes programs across urban and suburban contexts.

LEADERSHIP HIGHLIGHTS

- » **Human Skills Analytics & Measurement:** Co-founded and leads IMPACTER Pathway—an outcomes-driven platform translating constructed responses into decision-grade insights via rubric-aligned scoring.
- » **District & Network Leadership:** Served as superintendent across both district and charter contexts; led achievement strategy, organizational development, and community-facing change management.
- » **Instructional Systems & Assessment:** Built benchmarks, redesigned reporting structures, and implemented continuous improvement routines that strengthen teaching and learning outcomes at scale.
- » **Equity & Access:** Designed and implemented equity-centered interventions and supports across diverse communities, focusing on opportunity, belonging, and student success.
- » **Large Program Execution:** Led major initiatives including a \$106M bond program, enrollment growth, and public-private partnerships expanding arts and enrichment access.
- » **Curriculum Development:** Co-developed College Board Pre-AP English curriculum to increase access to appropriately challenging coursework for traditionally underrepresented students.

CORE COMPETENCIES

- Executive Leadership
- Superintendent/District Administration
- Organizational Change
- Instructional Improvement
- Curriculum & Assessment Design
- Benchmarking & Reporting Systems
- Equity-Centered Strategy
- Stakeholder Engagement
- Board & Community Communications
- Public-Private Partnerships
- Program & Initiative Management
- School Culture Building
- Teacher Development
- Data-Informed Continuous Improvement

EXPERIENCE

Co-Founder & Co-CEO | IMPACTER Pathway (Impacter Education Corp)

2021–Present

Co-founded IMPACTER Pathway, an EdTech platform leveraging natural language processing and machine learning to generate rubric-aligned human skills insights from authentic student voice. Leads strategy, partnerships, and product direction, translating educational and organizational needs into scalable measurement, reporting, and feedback systems.

Selected Contributions

- » Co-leads company strategy and go-to-market, focusing on human skills analytics that provide credible evidence and growth signals without reliance on Likert-style surveys.
- » Oversees measurement approach grounded in **rubric-aligned scoring** of open-ended student responses, enabling interpretability and classroom-useful feedback.
- » Partners with district and institutional stakeholders to align competency architectures to local frameworks and implementation constraints (time, burden, reporting needs).
- » Guides product direction across prompt design, scoring outputs, and analytics—prioritizing usable insights for school and system decision-making.
- » Communicates measurement philosophy and evidence logic to educators, administrators, and partners, bridging technical and instructional audiences.

Superintendent | CATCH Prep Family of Schools | Los Angeles, CA

2017–2021

Led achievement growth and development initiatives focused on increased access and opportunity for students and families in South Los Angeles.

Selected Contributions

- » Directed system-wide improvement priorities spanning academics, school culture, and student support structures.
- » Led organizational alignment across instructional leadership teams, staff development, and community engagement practices.
- » Supported school leaders in implementing coherent instructional focus areas and consistent progress monitoring.
- » Worked with internal and external stakeholders to strengthen pathways for student success and postsecondary readiness.

Superintendent | Culver City Unified School District | Culver City, CA

2016–2017

Led a 7,000-student district through high-impact initiatives, including a **\$106M bond project**, enrollment growth, and public-private partnerships expanding elementary visual and performing arts.

Selected Contributions

- » Managed complex district initiatives requiring cross-stakeholder alignment, transparent communication, and operational follow-through.
- » Advanced enrollment strategy and community-facing engagement approaches in a competitive public education environment.
- » Built partnerships to expand student opportunity through arts programming and enrichment access.

JOSHUA ARNOLD, Ed.D.

josh@impacterpathway.com | 949) 656-3673 | California

EXPERIENCE

Curriculum Developer | The College Board

2013–2020 (Concurrent)

Co-developed the College Board's **Pre-AP English** course—designed to ensure students from traditionally underrepresented groups have the supports needed to succeed in appropriately challenging classroom experiences.

Selected Contributions

- » Co-authored curriculum scope, sequence, and instructional approach centered on text-based reading, writing, and language development.
- » Contributed to teacher-facing materials and guidance aimed at improving rigor, coherence, and access to challenging academic work.
- » Supported the broader goal of expanding equitable readiness for AP-level coursework through earlier, well-scaffolded preparation.

Assistant Superintendent, Educational Services | Los Alamitos Unified School District

2014–2016

Responsible for the teaching and learning efforts and results of **500 teachers and 10,000 students** across six elementary schools, two middle schools, and one high school.

Selected Contributions

- » Led district instructional systems, including K–5 report card redesign, benchmark assessment development, and professional learning strategy.
- » Strengthened coherence across curriculum, assessment, and instruction through aligned expectations and educator support.
- » Oversaw implementation of professional development initiatives designed to improve instructional quality at scale.
- » Supported school leaders with planning, monitoring, and continuous improvement routines tied to student outcomes.

Principal | Los Alamitos High School | Los Alamitos, CA

2012–2015

Instructional leader for a **3,200-student** comprehensive high school with nationally recognized programs. Introduced "Instructional Rounds" to share and spread best practices.

Selected Contributions

- » Implemented structured instructional observation and feedback cycles to improve classroom practice and consistency.
- » Led staff culture-building efforts emphasizing shared ownership of student outcomes and professional learning.
- » Supported program excellence across academics, arts, athletics, and activities through strategic leadership and community engagement.

EXPERIENCE

Assistant Principal | Fountain Valley High School | Fountain Valley, CA 2010–2012

Supported academic achievement and schoolwide culture-building efforts in a community of highly engaged students, families, teachers, and staff.

Selected Contributions

- » Partnered with teachers and administrators to strengthen schoolwide systems for achievement and student support.
- » Supported culture and climate initiatives to sustain high expectations, belonging, and positive community engagement.

Principal | Crenshaw Arts-Tech Charter High School | South Los Angeles, CA 2008–2010

Responsible for the teaching and learning efforts and results of **500 teachers and 10,000 students** across six elementary schools, two middle schools, and one high school.

Selected Contributions

- » Led district instructional systems, including K–5 report card redesign, benchmark assessment development, and professional learning strategy.
- » Strengthened coherence across curriculum, assessment, and instruction through aligned expectations and educator support.
- » Oversaw implementation of professional development initiatives designed to improve instructional quality at scale.
- » Supported school leaders with planning, monitoring, and continuous improvement routines tied to student outcomes.

Assistant Principal (Practicum) | Boston Latin School | Boston, MA 2007–2008

Served on-site for practicum in conjunction with Harvard Graduate School of Education. Developed equity-focused interventions in English and Math to support college access for underrepresented students across the greater Boston area.

Selected Contributions

- » Designed targeted instructional supports and interventions aimed at reducing opportunity gaps.
- » Collaborated with school leadership and teaching teams to align supports with student needs and measurable outcomes.

English Teacher | Santa Monica High School | Santa Monica, CA 2005–2007

Taught 9th grade English, AP Literature, AP Language, and Freshman Seminar. Developed a free SAT Prep program for students in grades 9–11. Led the annual Commencement Speaker Committee.

Selected Contributions

- » Designed and delivered rigorous ELA instruction across introductory and advanced courses.
- » Built an SAT support program to expand access to college readiness resources.

JOSHUA ARNOLD, Ed.D.

josh@impacterpathway.com | 949) 656-3673 | California

EXPERIENCE

English Teacher & AP Coordinator | John C. Fremont High School | South Los Angeles, CA 2002–2005

Taught 9th Grade English, AP Literature, and English 10 Honors. Served as AP Coordinator for a **5,500-student** high school. Championed literacy and student achievement initiatives.

Selected Contributions

- » Led AP coordination and program support to expand participation and readiness.
- » Advanced literacy efforts and supported students in accessing more rigorous academic pathways.

EDUCATION

Doctor of Education (Ed.D.), Organizational Leadership

USC Rossier School of Education
2013

**Master of Education (M.Ed.), Instructional Leadership (9–12)/
Principal Licensure**

Harvard Graduate School of Education
2008

Bachelor of Arts (B.A.), English Language & Literature

UCLA
2001

C.7. Andrew Arnold, Ph.D. — Scientific Advisor (ML & NLP), Impacter Pathway

**ANDREW O.
ARNOLD, Ph.D.**

Principal Applied Machine Learning Engineer — Shopify
Adjunct Professor (Finance & Risk Engineering) —
 New York University | New York City Metropolitan Area (Remote)

SUMMARY

Hands-on applied machine learning scientist and leader with a rare blend of (1) frontier ML/NLP research, (2) large-scale product and cloud-service delivery, and (3) systematic investing experience building ML-driven signal and research platforms. Track record spans Shopify, Oracle Alpha, AWS AI Labs, Google Research, and nine years in quantitative trading leadership. Research interests and production strengths center on **robust machine learning**—models and features that hold up under **low signal-to-noise, small samples, and distribution shift**—with particular emphasis on **natural language** and **time series**.

EDUCATION

Carnegie Mellon University —

Ph.D., Machine Learning /
Computer Science (2009)

- Advisor:
William W. Cohen
- Thesis:
Exploiting Domain and
Task Regularities for
Robust Named Entity
Recognition

Carnegie Mellon University —

M.S., Machine Learning
(2007)

- Thesis:
A Comparison of
Methods for Transductive
Transfer Learning

Columbia University

B.A., Computer Science/
Artificial Intelligence
(2003)

- John Jay Scholar
- Computer Science
Departmental Award
- Magna Cum Laude
- Phi Beta Kappa
- Dean's List

CORE DOMAINS

- Machine Learning
- NLP
- Retrieval / Search
- Representation Learning
- Transfer / Continual Learning
- LLM Applications
- Time-Series Anomaly Detection
- ML Systems & Evaluation
- Org/Team Leadership
- Quantitative Trading (ML Alpha Research)

TECHNICAL HIGHLIGHTS

- Principal ML contributor building ML-powered products at **Shopify** (commerce-scale applications).
- Former **Chief Scientist** at **Oracle Alpha**, leading ML/NLP research and production for a systematic fundamental hedge fund.
- Former **Senior Science Manager** at **AWS AI Labs**, leading **45+** applied research scientists and managers and partnering with engineering/product to deliver ML-driven cloud services (LLMs, search, time series, speech/voice, BI).
- Former **ML Research** at **Google**, developing robust ML/NLP algorithms with real-world impact at production scale.
- Built and led ML-focused research/trading groups across multiple systematic funds (portfolio management + research leadership).
- Published across top venues including **NeurIPS, ACL/NAACL/EMNLP, SIGIR, KDD, CIKM, WWW**, plus a substantial body of patents (issued and published applications).

INVITED TALKS (selected)

- **Foundational Generative Recommendations for E-Commerce** — NeurIPS 2025 (joint talk with Liquid AI and NVIDIA), San Diego, CA.
- **Commerce Foundation Models** — NeurIPS 2024, Vancouver, BC.
- **A Shallow Introduction to Deep AI for Finance** — Wolfe Research conference (2023).
- Additional invited talks listed on personal site (ML/AI in trading, transfer learning, team building, and applied NLP).

PROFESSIONAL EXPERIENCE

Shopify

Principal Applied Machine

Learning Engineer

Jun 2024–Present | Remote (NYC)

- Builds machine learning–based products and features to improve commerce outcomes at scale.
- Focuses on modeling approaches that generalize across heterogeneous merchants, shifting distributions, and changing user behavior.

New York University (FRE)

Adjunct Professor

2018–Present | NYC Area

- Teaches graduate coursework in machine learning and natural language processing applied to quantitative trading and finance.
- Develops practical, evaluation-driven curriculum that connects modern ML/NLP methods to deployable research workflows.

Oracle Alpha

Chief Scientist

Jul 2022–Apr 2024

New York, NY

- Led ML/NLP research and production for an emerging systematic fundamental hedge fund.
- Owned end-to-end research agenda: feature discovery from unstructured data, robust model design for low-signal regimes, and productionization of research pipelines aligned to portfolio needs.

Amazon Web Services (AWS)

AI Labs

Senior Science Manager

Mar 2020–Jul 2022

New York, NY

Led **45+ applied research scientists and science managers**, partnering with product and engineering to build and ship AI-enabled cloud services driven by large-scale ML and natural language understanding, especially across **LLMs** and **no-code/low-code application development**.

Representative services and programs supported (science leadership):

- **Amazon CodeWhisperer** — LLM-powered coding companion
- **Amazon Kendra** — enterprise search
- **Amazon Contact Lens** — contact center analytics
- **Amazon Connect Voice ID** — ML-powered voice authentication
- **Amazon QuickSight Q** — natural language BI querying
- **Amazon Lookout for Metrics** — automated anomaly detection and diagnosis in time series

Google —

Machine Learning Research

Jul 2018–Mar 2020

NYC Area

- Developed large-scale ML and NLP algorithms emphasizing robustness and transfer learning.
- Advanced state-of-the-art methods with applicability to high-scale, high-reliability production systems.

QUANTITATIVE INVESTING & SYSTEMATIC RESEARCH (9+ YEARS)

**Cubist Systematic Strategies —
Portfolio Manager & Research
Director, Advanced Methods Group**
Jun 2015–Jun 2018 | NYC Area

- Created and led a hybrid research/trading group dedicated to proprietary ML-driven signals and strategies.
- Built ML recruiting pipeline and established research practices that translated theoretical ML results into real trading performance.

**Ophir Partners, LLC —
Co-Founder / Partner / Portfolio
Manager**
2013–Feb 2015 | New York, NY

- Built and co-ran research and trading for a medium-frequency equities quantitative hedge fund.
- Developed core alphas, signal construction methods, and portfolio optimization workflows emphasizing robustness and scalability.

**Trexquant Investment LP —
Chief Technology Officer**
2011–2013 | Stamford, CT

- Designed and managed research + technology systems supporting end-to-end quant workflows (data → modeling → backtesting → operationalization).

**WorldQuant LLC — Portfolio
Manager / Alpha Researcher**
2009–2011 | New York, NY

- Researched and traded profitable quantitative equity portfolios; engineered features from large noisy structured and unstructured datasets.

EARLY TECHNICAL EXPERIENCE (selected)

- **Merrill Lynch** — Quantitative Research (news/NLP-driven tradable signals)
- **Microsoft Research Asia** — Query-dependent ranking / transfer learning methods
- **IBM Research** — Temporal causal modeling for anomaly detection and profiling
- **Google** — Software Engineer, Local Search (early Google Maps coverage/verification systems)
- **Bloomberg** — R&D Analyst (large network performance + security technologies)
- **Columbia University** — Research Assistant, Intrusion Detection Systems Group
- **Lehman Brothers Japan** — Database engineering internship (JSP/SQL web interfaces)

PATENTS (issued & published applications — selected)

(Additional patents and applications available via personal site: <https://andrewwoarnold.com>.)

Issued / Granted

- **Methods of Unsupervised Anomaly Detection Using a Geometric Framework** — U.S. Patent **8,544,087** (granted; work originating from Columbia-era research).
- **Validating and Providing Proactively Generated Code Completion Suggestions for Code Development** — U.S. Patent **12,487,796** (2025).
- **Programmatically Generating Evaluation Data Sets for Code Generation Models** — U.S. Patent **12,141,553** (2024).
- **Constrained Prefix Matching for Generating Next Token Predictions** — U.S. Patent **12,014,155** (2024).
- **Query-Dependent Ranking Using K-Nearest Neighbor** — published patent lineage associated with SIGIR-era work (application/patent family referenced in provided excerpts).

Published Patent Applications (Selected AWS / code-generation & evaluation)

- **Constrained Prefix Matching for Generating Next Token Predictions** — US 20230418567 A1 (2023).
- **Programmatically Generating Evaluation Data Sets for Code Generation Models** — US 20230418566 A1 (2023).
- **Random Token Segmentation for Training Next Token Prediction Models** — US 20230419036 A1 (2023).
- **Validating and Providing Proactively Generated Code Suggestions** — US 20230418565 A1 (2023).
- **Systems and Methods for Automated Communication Summarization** — U.S. patent (2025) listed in provided citation/patent excerpt.

PUBLICATIONS (selected — expanded)

(Representative selection across robustness, retrieval, NLP, causal/time series modeling, and systems; full list available via Google Scholar.)

Robust ML, Anomaly Detection, Causality, and Transfer

- **A Geometric Framework for Unsupervised Anomaly Detection: Detecting Intrusions in Unlabeled Data** — Applications of Data Mining in Computer Security (2002).
- **Temporal Causal Modeling with Graphical Granger Methods** — KDD (2007).
- **A Comparative Study of Methods for Transductive Transfer Learning** — ICDM Workshops (2007).
- **Intra-document Structural Frequency Features for Semi-supervised Domain Adaptation** — CIKM (2008).
- **Exploiting Feature Hierarchy for Transfer Learning in Named Entity Recognition** — ACL:HLT (2008).
- **Exploiting Domain and Task Regularities for Robust Named Entity Recognition** — Ph.D. Thesis, CMU (2009).

Information Retrieval, Ranking, Retrieval Robustness

- **Query Dependent Ranking Using K-Nearest Neighbor** — SIGIR (2008).
- **Faithful Embeddings for Knowledge Base Queries** — NeurIPS (2020).
- **Instance-based Transfer Learning for Multilingual Deep Retrieval** — WWW Multilingual Search Workshop (2021).

- **Contrastive Fine-tuning Improves Robustness for Neural Rankers** — ACL Findings (2021).
- **Debiasing Neural Retrieval via In-batch Balancing Regularization** — NAACL Workshop (GeBNLP) (2022).
- **Neural Document Expansion for Ad-hoc Information Retrieval** — arXiv (2020).

**NLP, Reasoning,
Summarization,
Representation Learning**

- **Guessing What's Plausible but Remembering What's True: Accurate Neural Reasoning for Question-Answering** — arXiv (2020).
- **Improving Factual Consistency of Abstractive Summarization via Question Answering** — ACL (2021).
- **Supporting Clustering with Contrastive Learning** — NAACL (2021).
- **Pairwise Supervised Contrastive Learning of Sentence Representations** — EMNLP (2021).
- **Answering Ambiguous Questions through Generative Evidence Fusion and Round-Trip Prediction** — ACL (2021).
- **Mixed-Curvature Multi-relational Graph Neural Network for Knowledge Graph Completion** — WWW (2021).
- **Lifelong Pretraining: Continually Adapting Language Models to Emerging Corpora** — NAACL (2022).
- **Virtual Augmentation Supported Contrastive Learning of Sentence Representations** — ACL Findings (2022).
- **DQ-BART: Efficient Sequence-to-Sequence Model via Joint Distillation and Quantization** — ACL (2022).
- **Uncertainty-based Active Learning for Reading Comprehension** — Transactions on Machine Learning Research (TMLR) (2022).

**Code Generation / LLM-
Oriented Research (AWS-era
— selected items referenced
in provided materials)**

- **Multi-lingual Evaluation of Code Generation Models** — ICLR (2023) (top-25% noted in provided excerpt).
- **Exploring Continual Learning for Code Generation Models** — ACL (2023).
- **Multitask Pretraining with Structured Knowledge for Text-to-SQL Generation** — ACL (2023).
- **ContraCLM: Contrastive Learning for Causal Language Model** — ACL (2023).
- **ReCode: Robustness Evaluation of Code Generation Models** — ACL (2023).
- **A Static Evaluation of Code Completion by Large Language Models** — ACL (2023).
- **Greener yet Powerful: Taming Large Code Generation Models with Quantization** — FSE (2023).
- **CoCoMIC: Code Completion by Jointly Modeling In-file and Cross-file Context** — arXiv (2023).

C.8. Andrea Deveau — Managing Partner, Deveau Burr Group

Andrea Deveau

805-234-5481 · andrea@deveauburrgroup.com · deveauburrgroup.com
1215 K St. Suite 1820 Sacramento, CA 95814

PROFESSIONAL SUMMARY

Andrea Deveau is Managing Partner and co-founder of Deveau Burr Group, a California-based government relations and strategic consulting firm with offices in Sacramento and the Bay Area. She is a seasoned policy and advocacy leader with deep experience in energy, technology, innovation, education, and behavioral health policy, and almost three decades of experience navigating complex legislative and regulatory environments.

Andrea has built a career representing leading companies, associations, and public-sector organizations in California and across the United States. Her work focuses on legislative strategy, regulatory engagement, coalition building, and public policy development at the intersection of technology, energy, workforce, economic development, education, and behavioral health.

Prior to co-founding Deveau Burr Group, Andrea served as President of Strategies 360 in California, where she led six offices statewide and expanded the firm's education and government relations practices. Earlier in her career, she served as Vice President of State Policy and Politics for TechNet, directing the organization's nationwide advocacy program and advancing major legislative initiatives on privacy, cybersecurity, advanced energy, education, and the future of work.

Andrea previously spent a collective 15 years at Direct Energy, through acquisitions, as Senior Director of Policy Innovation, overseeing multi-state government affairs and policy strategy. Her work focused on energy market development, regulatory policy, and government engagement across local, state, and national levels.

She is widely recognized for her ability to navigate California's complex policymaking environment and build effective partnerships among policymakers, industry leaders, and community stakeholders.

PROFESSIONAL EXPERIENCE

- | | |
|--|-----------------------|
| Deveau Burr Group
Managing Partner | 2023 - Present |
| <ul style="list-style-type: none">• Co-founded and leads a government relations and strategic consulting firm serving clients across the technology, energy, education, and nonprofit sectors.• Provides strategic counsel on California legislative and regulatory policy, including advocacy before the Legislature, state agencies, and the Governor's Office.• Leads coalition development, legislative strategy, stakeholder engagement, and public policy campaigns for a diverse client portfolio.• Advises companies and organizations navigating emerging policy areas including artificial intelligence, cybersecurity, clean energy, technical assistance, and workforce policy. | |
| Strategies 360
President, California | 2018 - 2023 |
| <ul style="list-style-type: none">• Led the California operations of a multi-state government relations firm, overseeing six offices and a statewide team.• Built and expanded the firm's policy and advocacy practice, including the development of a leading education policy portfolio.• Provided strategic government affairs counsel to companies, associations, and nonprofit organizations navigating California's policy environment. | |
| TechNet
Vice President, State Policy & Politics | 2014 - 2018 |
| <ul style="list-style-type: none">• Directed TechNet's nationwide state advocacy program representing the technology industry.• Advanced policy initiatives related to innovation, advanced energy, privacy, security, and workforce development.• Secured legislative victories across multiple states and expanded TechNet's engagement with policymakers nationwide. | |

Direct Energy

1999 - 2014

Senior Director, Policy Innovation

- Managed multi-state government affairs and policy strategy for one of North America's largest competitive energy suppliers.
- Led legislative and regulatory initiatives related to competitive energy markets and consumer policy.
- Represented the company in regulatory proceedings, legislative negotiations, and stakeholder coalitions.

LEADERSHIP AND BOARD SERVICE

- **Executive Director** — California Association of Veteran Service Agencies (2025 - 2026)
- **Former Member** — City of Sacramento Mayor's Tech Council (2018-2023)
- **President** — Merit Partners Board
- **Steering Committee Member** — California Alliance for Competitive Energy Solutions
- **Former President** — Alliance for Retail Energy Markets
- **Former Board Member** — Arizona Independent System Administrator
- **Honorary Leadership Council** — Million Women Mentors

AWARDS & RECOGNITION

- **Leadership California Honoree – "The Power of Us" (2026)** Recognized by Leadership California for outstanding leadership and contributions to public policy, innovation, and advancing collaborative solutions that strengthen California's economy and communities. The honor highlights women leaders making meaningful statewide impact through public service, policy leadership, and cross-sector engagement.
- **Kent Wheatland Award – Western Power Trading Forum (2012)** Awarded in recognition of leadership and advocacy advancing competitive energy market policy and innovation in energy markets.

EDUCATION

- **B.S.B.A., Marketing** — University of Arizona | 1993-1997
- **Activities and Societies: Leadership in Business Training Program** — Carnegie Mellon University - Tepper School of Business | 2008

C.9. Gina Plate — Deveau Burr Group

Gina M. Plate, M.Ed.

Senior Vice President, Deveau Burr Group

Executive Summary

Senior policy and government affairs executive with more than 25 years of experience advancing statewide initiatives across California's education and child-serving systems. Recognized for translating complex state policy and regulatory frameworks into practical implementation strategies for public agencies, county systems, school districts, charter schools, and nonprofit providers.

Extensive experience working at the intersection of education, behavioral health, and youth-serving systems, including policy development, regulatory strategy, and statewide implementation of initiatives affecting vulnerable youth and students with complex needs. Proven ability to convene stakeholders across agencies, align policy with implementation, and support large-scale initiatives requiring coordination across state and local systems.

Areas of Expertise

- Technical Assistance to Local Educational Agencies
- Performance Management & Systems Alignment
- Behavioral Health & Student Supports Policy
- Government Relations & Legislative Advocacy
- State Budget & Regulatory Policy
- Cross-Agency Coordination (Education, Health, Human Services)
- Technical Assistance & Capacity Building
- Stakeholder Engagement & Coalition Development

Professional Experience

Deveau Burr Group, LLC – Sacramento, CA | Senior Vice President

December 2023 – Present

- Advises education institutions, nonprofits, and public agencies on legislative strategy, regulatory engagement, and statewide policy and implementation.
- Supports organizations implementing policy changes aligned with state funding frameworks.
- Leads stakeholder engagement strategies connecting policymakers, public agencies, and local partners.

Strategies 360 – Sacramento, CA | Senior Vice President

September 2022 – January 2024

- Provided government affairs and policy consulting services for organizations across California's education and child-serving systems.
- Advised clients navigating complex multi-agency policy environments impacting education, behavioral health, and youth services.

California Charter Schools Association | Vice President, Regulatory Affairs & Special Education

December 2019 – November 2022

- Directed statewide regulatory strategy related to charter schools and special education policy.
- Led engagement with state agencies on regulatory implementation.

California Charter Schools Association | Vice President, Regional Advocacy

August 2017 – December 2019

- Led regional advocacy strategies and engagement with policymakers, county offices of education, and school leaders.
- Coordinated advocacy initiatives aligned with statewide education policy priorities.

California Charter Schools Association | Senior Advisor for Special Education

December 2009 – August 2017

- Provided policy expertise and strategic guidance on special education issues affecting charter schools statewide.

Seneca Family of Agencies – Bay Area, CA | Director of Education

June 1996 – December 2010

- Oversaw education programs serving youth with complex behavioral health and educational needs.
- Coordinated services across education, mental health, and community systems.

State Policy Leadership

Chair – California Advisory Commission on Special Education (2013 – 2022)

Provided leadership for a statewide advisory body responsible for advising the Governor, Legislature, and State Superintendent on special education policy and service delivery.

Additional Policy Consulting

Education Policy Consultant – California Alliance of Child & Family Services (2005 – Present)

Provides policy guidance connecting education, behavioral health, and youth services systems across California.

Education

University of San Diego — Master of Education (M.Ed.), Special Education

University of San Diego — Bachelor's Degree

C.10. Elizabeth Estes — Breaking Barriers California

Elizabeth Estes, Esq.

Founder and Director, Breaking Barriers

Clinical Professor of Public Policy, University of the Pacific, McGeorge School of Law

415.806.2312

Skills

- Thoughtful and inspirational leader who provides mentorship, motivation, solution and training statewide
- Strategic partner with expertise in, and relationships with, California children's service systems, including social welfare, juvenile justice, education, behavioral health and legislature
- Highly effective creative thinker working at all levels to solve complex problems of improved integrated children's care and outcomes in California, from legislative solutions to local program improvement and implementation
- Extensive experience building and managing institutions in California designed to serve and improve children's system implementation and design, including: education, law firm and non-profit agencies

Experience

June 2024 - present

University of the Pacific, McGeorge School of Law – *Director of Breaking Barriers and Clinical Professor of Public Policy*

- Oversee and run Breaking Barriers statewide interagency initiative aimed at collaboratively breaking current systemic barriers to academic, social, emotional and behavioral health for California's children and youth
- Run Breaking Barriers annual Integrated Care Symposium attracting 300+ decision makers from across California and US
- Develop, research and publish ongoing papers towards integration of services for California's children and youth
- Assist in development of California policy that better incentivizes and implements an integrated system for children and youth
- Provide technical assistance to state and counties regarding implementation of a more integrated system for California's children and youth at the local level
- Unite with state and local agency and community partners to improve advocacy for and implementation of a more integrated system for California's children and youth, including implementation of the California Transforming Together Initiative, California Community Schools Initiative, Child and Youth Behavioral Health Initiative and others

September 2014 - present

Breaking Barriers, California – *Founder and Director*

- Statewide interagency initiative aimed at collaboratively breaking current systemic barriers to academic, social, emotional and behavioral health for California's children and youth
- Annual Symposium attracts 300+ decision makers from across California and US
- Developed, researched and published multiple papers, including Integrated Care Field Guide and California HHS Ecosystem Working Paper to share roadmaps to change with California state departments, legislature and national experts on improved children's system implementation and design
- Assisted in development of California policy that better incentivizes and implements and integrated system for children and youth

May 2022 - May 2023

California Institute of Law, Neuroscience, Education – Executive Director

- Developed and incubated the new interdisciplinary California Institute of Law, Neuroscience, and Education
- Interfaced with all partners in development, with departments and leaders of UCSF, UC Hastings, and UCLA
- Built out and lead three retreats across the University of California campuses to design and establish Institute
- Incubated and institutionalized functioning tri-campus organizational design, faculty network and initial interdisciplinary research and development projects

April 2015 - June 2023

AALRR, Pleasanton – Of Counsel

- Partner representing school districts and county offices of education across California
- Litigator with expertise in special education programming and the educational rights of parents and children across all bodies of California and federal law
- Trained juvenile judges, mediators, school administrators and staff statewide on all aspects of special education and student services law and implementation across California
- Developed alternative dispute resolution processes across child serving agencies at local level

January 1998 - March 2015

Dannis Woliver Kelley, San Francisco – Partner and Chair, Students & Special Ed Practice Group

- Managing partner of Student Services and Special Education division in statewide firm
- Supervised and trained attorneys across statewide offices on special education and student services and represented school districts across California
- Represented local education authorities in all aspects of special education and student services. In-house counsel for many large school districts on legally compliant development of child and youth programs statewide

May 1994 - May 1997

Los Angeles County, Los Angeles – Dependency Court Legal Services

- Represented dependent minors in Los Angeles County
- Trained attorneys in California dependency and delinquency law and process

Education & Admission

Loyola Law School, Los Angeles, 1994 – JD

University of California, Berkeley, 1991 – BA

Admitted 1994, California, U.S. District Court, Southern District of California

California Gubernatorial and First Partner Board Appointments

Gubernatorial Appointee, California Advisory Commission for Special Education

Child Well-Being Advisory Council, California Partners Project

C.11. Lisa Colvig-Niclai — Senior Vice President, ASR

CURRICULUM VITAE

LISA COLVIG-NICLAI, MA

Senior Vice President of Planning and Evaluation
Applied Survey Research
Email: lisa@appliedsurveyresearch.org

OVERVIEW

Lisa Colvig-Niclai is a seasoned planner, researcher, evaluator, and facilitator with more than 30 years of experience creating, evaluating, and strengthening systems of support for vulnerable populations. She began her career in 1995 with PLAN International in Indonesia, supporting the Country Office with community-led strategic planning, analysis, and field evaluations across 17 program offices. After returning to the U.S. in 1999, she joined Applied Survey Research (ASR). In 2002–2003, she completed a master's degree in Education Policy Analysis and Evaluation at Stanford University. In 2003, she launched ASR's Bay Area office in San Jose and, in 2015, established the Sacramento office.

A consistent thread throughout Lisa's career is helping partners define success, identify critical information needs, build data architecture, manage data collection systems, and drive data-to-action strategies that strengthen services and sustainability. One major information gap she addressed is early school success. In 2001, drawing on the National Education Goals Panel's definition of kindergarten readiness, she developed the Kindergarten Observation Form.[®] Paired with a Parent Information Form and linked by a unique child ID, these tools create a rich profile of children's early experiences and readiness skills. Through partnerships with LEAs across the country, teachers have completed more than 300,000 KOF assessments. Lisa has also led longitudinal studies across six counties, using de-identified data to examine how kindergarten readiness as measured by the KOF independently predicts students' academic achievement, attendance, and behavioral outcomes. She also helped school-based partners use these data improve services, through multi-year initiatives in Marin County (2010–14), Alum Rock Union School District (2016–19), Napa County Early Learning Initiative (2009–2014), Santa Clara County Head Start (2008–10), and Los Angeles Universal Preschool (2008–12). Since 2021, she and her team have supported the Missouri Department of Elementary and Secondary Education in coordinating statewide readiness assessments and embedding readiness data into the state's K–12 data system. In partnership with the Santa Clara County Office of Education and Franklin-McKinley School District, she also redesigned the evaluation for Educare California at Silicon Valley and led classroom assessments, data coaching, and impact reporting (2016–2024).

Lisa has also addressed critical information needs related to child and youth emotional wellbeing. She developed partnerships with county probation departments to evaluate school-, community-, and institution-based programs for youth. Her longitudinal study for San Mateo County Juvenile Probation established recidivism rates for key subgroups and identified predictors of repeated justice involvement. She designed and led the evaluation of the Universal Access Pilot, which strengthened social-emotional supports in two high-needs elementary districts in Santa Clara County (2019–2023). By the project's close, both districts had embedded school-based social workers and counselors on every campus, creating a consistent system of care for students with behavioral health needs. Lisa also spearheaded a seven-year evaluation of Santa Clara County Behavioral Health's KidConnections Network (KCN), finding consistent improvements on standardized measures such as the Child and Adolescent Needs and Strengths (CANS). In 2013–14, she partnered with Oak Grove Unified to evaluate School Linked Services, a behavioral health referral and triage model. From 2000–2007, she led the federally funded Greenbook Initiative, strengthening systems of care for families experiencing both child maltreatment and domestic violence. Since 2022, she has led the countywide evaluation of Siskiyou County's Mental Health Services Act (MHSA) initiatives, including multiple LEA-based programs. In 2024, she guided Sacramento County Behavioral Health's youth needs assessment, integrating quantitative data with insights from school-based behavioral health staff and youth. Her team has also conducted four quasi-experimental evaluations of child-welfare programs in Sacramento County, finding that participants were statistically less likely to experience further maltreatment compared with matched comparison groups. In partnership with Child Advocates of Silicon Valley, Lisa and her team designed a data collection system that highlights the key social, academic, and behavior outcomes for dependency children and youth supported by a

LISA COLVIG-NICLAJ, MA

court advocate. This same tool is now being utilized across multiple Bay Area CASA organizations to measure success.

Following the passage of the Affordable Care Act, Lisa and her team designed an innovative, cost-effective strategy for nonprofit hospitals and hospital coalitions in Santa Clara, San Mateo, and Alameda counties complete the required **Community Health Needs Assessments (CHNAs)**. These CHNAs consistently identified behavioral health as one of the top five investment priorities, informing strategic deployment of community benefit funding. Lisa has provided extensive grantee evaluation training and technical assistance for hospital systems including Kaiser San Jose, Kaiser Santa Clara, Kaiser San Mateo, El Camino Hospital, and Sequoia Healthcare District. In 2018, she supported the Solano County Board of Supervisors in identifying the county's most pressing human service needs, resulting in significant community grant investments—particularly in mental health.

Lisa and her team have partnered with 32 of California's 58 **First 5 Commissions** to build measurement systems that clearly demonstrate impact on child and family wellbeing, including early childhood mental health, parent-child interaction, early learning, and school readiness. Her **statewide work** includes strategic planning for the Mental Health Oversight and Accountability Commission (2021–23); development of a system-of-care initiative in Sutter County; a five-year retrospective assessment of DJJ Realignment for the Office of Youth and Community Restoration; creation of a statewide youth behavioral health data dashboard; evaluation technical assistance for domestic violence agencies (California Department of Public Health); and a Policy Impact Brief for First 5 California documenting the reach, impact, and return on investment of Proposition 10.

EDUCATION

- 2003 M.A., **Education Policy Analysis and Evaluation**, Stanford University, School of Education, Stanford, CA.
- 1995 **Institute Keguruan dan Ilmu Pendidikan (IKIP)** Malang, East Java, Indonesia, sponsored through US-based Council on International Education Exchange.
- 1995 B.A., **Cultural Anthropology**, University of California Santa Cruz, Santa Cruz, CA. Minor in Southeast Asian Studies; additional focus on Economic Development.

PROFESSIONAL EXPERIENCE

Senior Vice President of Planning and Evaluation Services, Applied Survey Research	Sacramento, CA, 7/2023 to present Continuous expansion of ASR's research services throughout California and the United States. Increased focus on helping partners find pathways for financial sustainability for their key programs and services, and strengthening collaborative systems of care. Examples include: • CalAIM/ CYBHI: Training, technical assistance and onboarding of several community and school-based agencies in Siskiyou, Solano, Sutter, Yuba, Tehama counties to begin billing for reimbursable services; contribute to regional communities of practice (Funder: Partnership Healthplan of California). • Commission for Behavioral Health: Evaluation of four-agency system of care for children and families in Sutter County, including parental substance and mental health services, developmental screenings and services for children, and quasi-experimental evaluation of child maltreatment when grant ends in 2028. • Office of Youth and Community Restoration: Five-year retrospective assessment of DJJ Realignment, and creation of a statewide youth behavioral health data dashboard for OYCR. • Mental Health Oversight and Accountability Commission: Two-year strategic planning process, including an overall theory of change (e.g. the mission of OAC, its core functions, how the Commission supports counties as well as affects statewide policy, identifying an overall vision of <i>wellbeing for all</i>) and defining next steps, including establish clear metrics for counties, OAC performance accountability, and better communication with county, state, and general population audiences. • Sacramento County Children and Youth System of Care (AB2083): Assist the County Executive's Office, Sacramento County Office of Education, County Probation, County Child Welfare, County Behavioral Health and First 5 to establish key performance metrics, gather data, and use CLEAR
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LISA COLVIG-NICLAI, MA

IMPACT's Results-Based Accountability Scorecard to display trends and interpret trends together.

- **Solano County Probation Strategic Plan:** Needs assessment and strategic plan for adult, juvenile and juvenile detention center services.
- **Yuba County Strategic Plan:** Needs assessment of adult, juvenile and juvenile detention center services strengths, weaknesses and opportunities.
- **Community Solutions:** Refine data system and produce evaluation reports for large behavioral health provider in Santa Clara County.
- **Department of Children, Family and Adult Services Cultural Broker Evaluation:** Conduct evaluability assessment and quasi-experimental analysis of program outcomes for African American families in the child welfare system to determine readiness for submitting program to the Title IV-E Clearinghouse.
- **First 5 County evaluations:** Continuation of annual county evaluations for Santa Clara, San Benito, Kern, Lake, Ventura, Sacramento, Yuba, Sutter, Tehama, Glenn, Solano, Mono, and Siskiyou.
- **First 5 California:** Preparation of statewide Impact Brief detailing reach, impact and return on investment across three child and family result areas (funded by First 5 Solano).
- **Kindergarten Readiness Assessments:** Continuation of county assessment studies in Santa Clara County, Mendocino, Siskiyou, Del Norte, Missoula; Continue statewide assessment in Missouri.
- **United Way of California Capitol Region:** Strategic business plan detailing strengths, weaknesses, and areas to stabilize funding for essential child, youth, school and family services.
- **United Way Bay Area:** Assessment of community need compared with philanthropic spending by zip code across 9 counties, in order to pinpoint disparities in funding.

Vice President
of Evaluation
Services,
Applied Survey
Research

San Jose, CA, 3/2010 to 6/2015 and Sacramento, CA, 6/2015 – 7/2023

Primary focus was on building robust needs assessment and evaluation methodologies, and replicating/scaling them where needed. Examples include:

- **Needs Assessments:** Designed and conducted needs assessments to understand the status of key populations, quality of life issues, or systems fragmentation. Examples include *Sacramento County Child Safety Forward assessment of child abuse deaths and near fatalities*, *Home Visiting Environment Scans* for First 5s in Santa Clara, Yuba, Sutter, and Tehama counties, *ACEs Network of Care* assessments in Santa Clara, Tehama and Sutter counties, *Silicon Valley Latino Report Card*, *Status of Women and Girls Reports* (Santa Clara County, Solano County), Kaiser Permanente Community Health Needs Assessments (CHNA) South Bay and San Mateo, *Solano County Human Services Needs Assessment/Community Investment Fund*, and *San Mateo County Juvenile Justice Local Action Plan*.
- **Kindergarten readiness assessments:** Began and/or continued working with multiple county and district LEAs to implement county-level kindergarten readiness assessments (Los Angeles, Alameda, Sacramento, San Francisco, Santa Clara, Siskiyou, Del Norte, Mono, Sierra, Inyo, Alpine, Sutter, Contra Costa, San Benito, Napa, Marin, Coconino County (AZ), Duke University (NC).
- **Strategic Planning:** Designed and conducted strategic planning to identify critical desired results, indicators and strategies for numerous county First 5s: Solano, Sacramento, Santa Clara, San Benito, Sutter, Yuba, Siskiyou, and Tehama. Also supported several large healthcare providers to clarify their desired results and indicators: *Kaiser Permanente San Jose*, *Kaiser Permanente Santa Clara*, *Santa Clara County Community Benefit Coalition*, *Sequoia Health Care District*, *El Camino Hospital and District*. Assisted public agencies (*San Mateo County Human Services Agency*, *Santa Clara County Family Wellness Court*) and smaller CBOs (*SOMOS Mayfair*, *Alum Rock Counseling Center*) to identify essential agency or program-wide outcomes and indicators. Helped *Menlo Park City School District* create a Local Performance Index, as a counterpart to the Academic Performance Index. Helped East Palo Alto and San Jose plan their *My Brothers Keeper* results and strategies. Assisted the *Napa Valley Vintners* to refine their

LISA COLVIG-NICLAI, MA

	funding portfolio; the top priority needs for grantmaking were 1) Youth Mental Health and 2) K-12 Student Success. • Evaluations: Designed and implemented evaluations of all sizes and experimental levels, from formative, largely qualitative inquiry or case studies (<i>GFS Home Literacy Practices study</i>) to agency-level outcome evaluations (First 5s in Santa Clara, Sacramento, Yuba, Sutter, Tehama, Siskiyou, Ventura), to initiative evaluations (Sacramento's <i>Reducing African American Child Death</i>) cross sectional, case-control studies with treatment and comparison groups (<i>school readiness assessment studies</i>), and longitudinal studies tracking outcomes such as student achievement (<i>Marin County Ready Schools PreK-3rd Initiative</i>, <i>Oak Grove Unified School Linked Services evaluation</i>) and juvenile delinquency (<i>San Mateo Probation</i>) and child welfare outcomes (<i>Birth & Beyond AmeriCorps Quasi-experimental Evaluation</i>; <i>Child Advocates of Silicon Valley</i>). • Evaluation capacity building: Provided trainings and assistance to funders, county departments, grantees, schools and community collaboratives to help them identify their desired results and define simple metrics they can use to measure progress; often trained partners on use of Results-Based Accountability as a concise framework for defining population-level results and program-level performance measures.
Director of Evaluation, Applied Survey Research	San Jose, CA, 02/2003 – 03/2010 Opened the San Jose office in 2003, and expanding research and evaluation services throughout the greater Bay Area, continuing to apply theory-based, participatory evaluation methodologies to help funders, systems and programs understand and strengthen impacts for children, youth, families and communities. Examples included: • Kindergarten readiness assessments: Worked with multiple county and district LEAs to implement county-level kindergarten readiness assessments (Los Angeles, Alameda, San Francisco, Santa Clara, Santa Cruz). • San Mateo County Human Services Agency strategic plan (2008). • San Mateo County Behavioral Health: Led strategic planning process to merge what was formerly two different departments: Alcohol and Other Drug (AOD) and Mental Health. Designed and led RFP procurement process. • San Mateo County juvenile probation evaluation (2008-present). Won the award to redesign and refine the annual grant program (JJCPA, JPCF) for probation-administered programs as well as several community-based behavioral health, enrichment and school-based programs.
Project Manager, Applied Survey Research	Watsonville – San Jose, CA, 07/2001 – 02/2003 Acquired, designed, managed, and/ or assisted in the management of numerous assessment and evaluation projects. Projects related to enhancing the well-being of children, youth and their families, such as reduction of poverty and family violence, success in school and equitable access to resources. Examples included: • Kindergarten Readiness Assessment: Year-long development of tool (Kindergarten Observation Form TM or KOF) framed by the National Education Goals Panel's 5 domains of readiness, and based on local educator about what "readiness" should look like. Funders and design team included Peninsula Community Foundation, First 5 San Mateo, County Office of Education, and representatives from 9 district LEAs. The KOF was piloted in 2001 across 9 districts, and assessed for inter-rater reliability. The Academic domain of the KOF was consequently reconstructed to be a direct skill-based assessment of student competencies, while the other domains remained as observational assessments. The KOF was again administered across the 9 districts in 2002 and 2003, and later expanded throughout California and the US (described above). • Coordinated Community Response (CCR) to Intimate Partner Violence evaluation (2000-2004); funded by the US Centers for Disease Control and Prevention. Cross-site comparative evaluation of law enforcement and domestic violence agencies to create a system of care for victims of domestic violence.

LISA COLVIG-NICLAI, MA

	• <i>Greenbook Initiative</i> evaluation (2000-2007); funded by the US Department of Justice and US Department of Health and Human Services.
Senior Research Analyst, Applied Survey Research	Watsonville, CA, 02/1999 – 07/2001 Designed and implemented community needs assessments, including identification of indicators and measures, primary data collection, acquisition of local, state and national secondary data, creation of written reports and visual data presentations. Examples include: • Santa Cruz County LPC Child Care Needs Assessment (Funder: Santa Cruz County Office of Education). • Nevada County Housing Needs Assessment (Funder: Nevada County Housing Authority). • Santa Cruz Community Assessment Project (Funder: United Way). • Monterey County Tellus / Diganos Community Assessment (Funder: Monterey County Community Foundation). • Nevada County Community Assessment (Funder: United Way).
Technical Planning, Evaluation and Communications Consultant, PLAN International Indonesia, Country Office	Surabaya, Indonesia, 08/1995 – 12/1998 Provided planning and evaluation technical assistance to the County Management Team, including Country Director, Country Office managers, the Technical Services Manager, and to 17 Program Unit Managers representing over 50,000 sponsored children and their families. • Helped design and implement annual Community-Based Program Management (CPBM) planning cycles in which local village committees identified their child, family and community priorities, created budgets and submitted proposals. Worked with Country Management Team to plan the general design of the upcoming planning cycle across the country, and also traveled to help specific Program Units organize their local budget packages for the greatest impact possible. These proposals were then combined at the Program Unit level, regional level, and then at the country level. Work with Country Office team to synthesize all priorities across the country into PLAN International's impact domains. Once the annual allocation for Indonesia was received, traveled to various Program Units to assist with implementation and/ or conduct field visits and interviews to evaluate implementation successes, lessons learned and sustainability. • With the Country Sponsorship and Grants Manager, was responsible for creating a reporting system (data elements, templates) for field programs to more accurately convey outcomes for sponsored children, their families and communities. In 1997, conducted a special communications project in Timor, in which sponsored children shared a personal voice message and a song for their sponsoring family; these were transferred to cassette tapes by a local recording company and mailed to their sponsoring families. Also served as a host and language translator for foreign media, dignitaries and sponsoring parents visiting the field.

ACADEMIC HONORS AND AWARDS

- Graduated with honors from UC Santa Cruz, Cultural Anthropology and Southeast Asian Studies, 1995.
- Graduated with honors from Stanford University, Education Policy Analysis and Evaluation, 2003.

PRESENTATIONS AND TRAININGS

Conference Presentations

- *Making Your Connection Count: How to Link What You Do To Shared Community Results*, Kids in Common Summit, San Jose, Ca. 2012.
- *Collective Impact*, Kids in Common Summit, San Jose, Ca. 2015.
- *Aligning Outcomes: External Evaluators & Common Indicators*, First 5 Association Staff Development Summit, Los Angeles, Ca. 2015.

LISA COLVIG-NICLAI, MA

- *Laying the Stepping Stones from Cradle to Career: What Works to Change the Odds?* Kids in Common Summit, San Jose, Ca. 2016.
- *Creating a System of Evidence-based Parent Education in Rural Counties*, National Family Resource Association, Virtual Session, 2018.
- *Mapping a Pathway to Success for all Children: Solano County Children and Youth Summit*, Joint Session Between Solano County Board of Supervisors and First 5 Solano, Fairfield, Ca. 2018.
- *Narrowing the Kindergarten Readiness Opportunity Gap in Alum Rock Union School District, East San Jose: Creating Systemic Pathways to Success for All Children*, First 5 California Child Health, Education, and Care Summit, Glendale, Ca. 2018.
- *First 5 Solano Systems Change Action Plan: Creating a Strategic Approach to Strengthen, Integrate, Expand and Sustain Solano County's Early Childhood System*. First 5 California 5 Child Health, Education, and Care Summit, Glendale, Ca. 2018.
- *Universal Access Program with Santa Clara County of Education, Alum Rock Union School District and Franklin McKinley School District, FIRST 5 Santa Clara County*, First 5 California 5 Child Health, Education, and Care Summit, Irvine, Ca. 2020.
- *Doubling Our Impact in Siskiyou County*, First 5 California 5 Child Health, Education, and Care Summit, Irvine, Ca. 2020.
- *Building a Cross-Sector Early Childhood System: The KidConnections Network*, American Public Health Association, Virtual, 2021.
- *Children's Agenda Results: Where Are We Now and How Do We Do Better?* Kids in Common Summit, San Jose, Ca. 2023.
- *Crafting a Child-Centric Ecosystem: Sutter County's Holistic Model for Early Development*, First 5 California Child Health, Education, and Care Summit, Irvine 2024.
- *Building World Class Data Solutions to Measure Impact in Small Rural Counties: The Story of Apricot 360 in Siskiyou and Yuba Counties*. First 5 California Child Health, Education, and Care Summit, Irvine 2024.
- *Legislative and Policy Springboard Strategies: How to Cultivate the Relationships Necessary for Success*, First 5 California Child Health, Education, and Care Summit, Irvine 2024.
- *Results-Based Accountability in Action: How Three First 5's are Driving Program and System Change (Sacramento, Solano, Contra Costa)*, First 5 California Child Health, Education, and Care Summit, Irvine 2024.
- *Building Momentum for Sustainable and Inclusive Wellbeing*, Organisation for Economic Co-operation and Development (OECD), Rome, Italy, 2024.
- *Advancing Equity and Transforming Systems in Solano County – Deep Dive Session*, Breaking Barriers, Sacramento, Ca, 2025.

Evaluation Technical Assistance and Trainings

- Kaiser Permanente San Jose, Grantee evaluation training and technical assistance (multiple years).
- Kaiser Permanente Santa Clara, Results-Based Accountability Training, 2011.
- Kaiser Permanente San Mateo, Grantee Evaluation 101, 2012.
- Sequoia Healthcare District, Annual Grantee Evaluation 101 training, Redwood City, Ca. 2011-2016.
- Kids in Common: Results-Based Accountability, San Jose, Ca. 2018.
- First 5 Solano: Results-Based Accountability, Fairfield, Ca. 2018-2023.
- San Mateo County Juvenile Probation local action plan, evaluation, grantee training and technical assistance (6-8 grant-funded projects), 2008-present.
- Santa Clara County Juvenile Probation evaluation, grantee training and technical assistance (4 grant-funded projects), 2010-2015.
- Sacramento County Children and Youth System of Care (AB2083) evaluation training and technical assistance with County Office of Education, County Behavioral Health, County Probation, County Child Welfare, 2022-present.
- First 5 Santa Cruz evaluation grantee training and technical assistance (15-20 grant-funded projects), 2001-2010.

LISA COLVIG-NICLAI, MA

- First 5 Santa Clara evaluation grantee training and technical assistance (20-30 grant-funded projects), 2017-2025.
- First 5 Sacramento strategic plan and evaluation, grantee training and technical assistance (10-12 grant-funded projects), 2015-present.
- First 5 Siskiyou evaluation, grantee training and technical assistance (10 grant-funded projects), 2017-present.
- MHSA Siskiyou evaluation, grantee training and technical assistance (10-12 grant-funded projects), 2022-present.
- First 5 Yuba strategic plan and evaluation, grantee training and technical assistance (12 grant-funded projects), 2015-present.
- First 5 Sutter strategic plan and evaluation, grantee training and technical assistance (12 grant-funded projects), 2018-present.
- First 5 Kern evaluation training and technical assistance (20 grant-funded projects), 2024-present.
- First 5 Ventura strategic plan, evaluation and technical assistance (8-10 funded projects), 2022-present.
- F5 Yuba – Sutter County Children and Families Commission 4-part Sustainability Workshop series, Yuba City, Ca. 2024.
- F5 Glenn strategic plan and evaluation technical assistance, 2025-present.
- CALAIM 101 training (CHW focus), Solano County, 2026.