



## CORPORATE CAPABILITY STATEMENT



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The Educational Policy Institute (EPI) is a Certified Small Business (SBA) and qualified US Department of Education ED-SAT contractor founded to provide rigorous educational research to inform public policy while also creating better linkages between research and the policy development process. EPI provides research design and management, program evaluation, policy analysis, and technical assistance to school districts, institutions of higher education, governmental organizations, and other stakeholders in the educational and public policy arena.

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

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

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MARCH 2020

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## Summary List of Clients

### GOVERNMENT AGENCIES

Colorado Commission on Higher Education (CCHE)  
Colorado Office of Behavioral Health  
Florida Council on Education Policy, Research, and Improvement (CEPRI)  
Iowa Department of Education  
Kentucky Council on Postsecondary Education  
Library of Congress  
Minnesota Office of Higher Education  
North Carolina Department of Public Instruction (NCDPI)  
Ohio Board of Regents  
Texas Education Agency  
Texas Higher Education Coordinating Board  
United States Agency for International Development (USAID)  
US Department of Education  
    *Office of Indian Education (OIE)*  
    *Office of Special Education Programs (OSEP)*  
    *International & Foreign Language Programs (IFLE)*

### PHILANTHROPIC ORGANIZATIONS

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

### NGOs

AVID Center  
Canada Millennium Scholarship Foundation (CMSF)  
College Success Foundation – DC  
Imagine America Foundation  
KIPP Foundation  
Midwestern Higher Education Compact  
National Action Council for Minority Engineers (NACME)  
National Council on Disabilities (NCD)  
Ohio College Access Network (OCAN)  
Organization for Economic Cooperation and Development (OECD)  
Pacific Resources for Education and Learning (PREL)  
Pew Hispanic Center  
SAVE the Children, Bangladesh  
Tropical Health and Education Trust (THET)  
United National Organization for Education, Science, and Culture (UNESCO)  
Western Interstate Commission on Higher Education (WICHE)

### HIGHER EDUCATION

Arizona State University  
Bergen Community College  
College of William & Mary  
DeVry, Inc.

Kaplan Higher Education  
Ohio Dominican University  
Old Dominion University  
Palm Beach Community College  
Santa Fe College  
Seattle Colleges  
University of Wisconsin System  
Valencia College  
Wilmington College

### SCHOOL SYSTEMS

ASU PREP Charter School System  
East Baton Rouge Parish School System  
Hampton City Schools  
Lawrence County School District  
Newport News Public Schools  
Pittsburgh Public Schools  
School Board of Osceola County, Florida  
SEED School of Maryland  
St. Vrain Public Schools

### CORPORATE/OTHER

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

## Core Capabilities

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

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

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

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

efforts, we also conduct reviews of related research, legislation, and literature.

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

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

**SwailLandis CONSULTING.** Through our subsidiary organization, **SwailLandis**, EPI provides direct consulting for institutions of higher education focused on student success. Some of the areas include professional development, benchmarking, change management, leadership development, team building, and policy development. **SwailLandis** assists institutions in the planning and implementation of new programs to improve student retention, complete with diagnostics and analysis of current conditions and practices.



## **Selected Project Experience**

## Elementary & Secondary Education

The Educational Policy Institute has worked with school districts around the country as well as government agencies on a series of research and policy projects from early childhood reading development to college preparation strategies. Clients have included the Library of Congress, US Department of Education, philanthropies, and school districts. Many projects were in support of federally funded grants, including Race to the Top and Investing in Innovation (i3). EPI has developed sophisticated evaluation plans for districts incorporating site visits, focus groups, interviews, surveys, including appropriate statistically analysis.

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## PROJECT ABSTRACTS

### **Magnet Schools Assistance Program (MSAP) Grant External Evaluation, East Baton Rouge Parish School System, Baton Rouge, LA (2020-22)**

EPI is working with the EBRPSS MSAP team to ensure the evaluation design follows ED's protocols and addresses key components for both an effectiveness study and an implementation study to determine the impact of the MSAP grant services. EPI is using a mixed-method study collecting and analyzing quantitative and qualitative data from a variety of stakeholders, including students, teachers, administrators, parents, and partners. EPI will evaluate objective performance measures based on the Logic Model theory of action aligned with the intended outcomes to examine the program's effectiveness, address evaluation questions, and ultimately produce evidence of promise. Contact: Ms. Theresa Porter, Director of Magnet Programs, EBRPSS (225-922-5443; [thporter@ebrschools.org](mailto:thporter@ebrschools.org)).

### **National AVID Peer Tutoring Study, AVID Center, San Diego, CA (2018-19)**

AVID (Achieving Advancement Via Individual Determination) is a nonprofit that trains 70,000 educators annually to help prepare students for college, careers, and life. AVID hired EPI to conduct a national study of peer tutors in schools that utilize AVID services. The purpose of this study was to determine the efficacy of peer tutors who were the same age or older as other students. This project involved site visits to Mesa School District (AZ), Dallas ISD, McKinney ISD (TX), Richardson ISD (TX), Hillsborough Public Schools (FL), and Albemarle County Schools (VA). This project involved site visits to over 25 schools as well as the development and administration of a teacher survey. EPI created a web-based survey instrument and used iPads to collect classroom data live during site visits. Contact: Dr. Dennis Johnston, Senior Director, Chief Research Officer, AVID Center (Associate VP, ASU Educational Outreach & Student Services; CEO, ASU Preparatory Academies (858-380-4800; [djohnston@avid.org](mailto:djohnston@avid.org)).

### **Arizona Public Schools Federal i3 Grant University Public Schools, Inc. – Gathering, Reflecting, Owning our Work (GROW) – Federal Investing in Innovation (i3) Grant (2013-2018)**

EPI was awarded a five-year contract to evaluate an innovative system of charter schools in affiliation with Arizona State University (ASU). The federal

grant brings high-quality educational instruction to a largely low-income, Hispanic population in and around Phoenix, AZ. Key strategies include: personalized learning environments for all students K-12; a technology-rich environment K-12; STEM immersion K-12; and enhancing the importance of families in the learning journey K-12. Individually, GROW strategies have been implemented, evaluated, and reported successful in promoting student academic gains through isolated studies. Taken together, in a comprehensive and fully integrated P-20 format, however, GROW represents a novel approach to promoting positive student outcomes, narrowing the achievement gap among sub-groups as demonstrated by UPSI's assessment data. Contact: Beatriz E. Rendon, Associate VP, ASU Educational Outreach & Student Services; CEO, ASU Preparatory Academies (480-727-5802; [Beatriz.Rendon@asu](mailto:Beatriz.Rendon@asu)).

### **College Success Foundation — District of Columbia (2015)**

The Educational Policy Institute served as the evaluator of the College Success Foundation – District of Columbia (CSF-DC), funded by the Bill & Melinda Gates Foundation. Since 2008, CSF-DC has provided approximately 1,200 scholarships totaling \$25 million to DC-area youth. Over 81 students have graduated from college with 700 still in the pipeline. The Educational Policy Institute conducted formative and summative evaluations of two core CSF-DC programs: the DC Achievers Scholarship Program and the HERO Program. The findings of this study helped CSF-DC improve the efficacy of their programs and become self-sufficient in funding. Contact: Chip Magid, Chair, Board of Directors College Success Foundation - DC (202-442-3555; [Magid.Chip@dorsey.com](mailto:Magid.Chip@dorsey.com)).

### **Academic Excellence through STEM Innovation, A Race to the Top (RTTT) Grant, St. Vrain Valley Schools, CO (2013-2016)**

The Educational Policy Institute was contracted by St. Vrain Valley Schools to evaluate their \$16 million federal Race to the Top (RTTT) program. The project involved several components with the goal of increasing graduation rates by five percent annually for all subgroups; promoting and expanding rigorous STEM programming at all levels with STEM; and increasing family engagement annually by providing opportunities for involvement in student learning. A major component of the project included the creation of the

Innovation Center at Skyline High School. St. Vrain will expand the school year, mentor high-risk students, and broaden science, technology, engineering and math (STEM) curriculum and also offer something called Ptech, which is described a STEM track for students who are not on a four-year college track. In addition, St. Vrain offered a seven-week summer program of intense math and literacy instruction to at-risk students. *Contact:* Regina Renaldi, Director of Title I Schools and Project Director, St. Vrain Valley School District, 395 South Pratt Parkway, Longmont, CO 80501 (303-682-7211; [Renaldi\\_Regina@stvrain.k12.co.us](mailto:Renaldi_Regina@stvrain.k12.co.us)).

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

EPI worked with WestEd on a multi-year project to monitor and provide technical assistance to grantees of the federally-funded Magnet Schools Assistance Program (MSAP). Individual program reviews, including monitoring visits, were used to observe the implementation of the grantee's approved MSAP program and determine compliance with federal statute and coherence with the grantee's approved MSAP grant application. The overall goal of the MSAP Compliance Monitoring Project was to determine how and to what extent MSAP grantees are using their federal funds to develop and implement high-quality magnet schools that decrease racial group isolation and increase student academic achievement. EPI contributed expert consultants to monitoring teams participating in on-site visits and data collection, summarize findings, and submit written reports. As a subcontractor, EPI's contact for the project was Ms. Sara Allender, Senior Research Associate, WestEd, 1350 Connecticut Avenue NW, Suite 1050, Washington, DC 20036-1709 (202-429-9724; [sallend@wested.org](mailto:sallend@wested.org)).

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

EPI was contracted by the Pittsburgh Public Schools to plan and execute an evaluation of the implementation process and early impacts of the Pittsburgh Science & Technology Academy ([www.pghscitech.net](http://www.pghscitech.net)), a school for 6th to 12th graders, targeting the development of skills that will enable students to pursue a career in science, technology, engineering, or mathematics. The creation of this school followed three years of research and planning. EPI provides program evaluation services focused on 1) the program in practice relative to its goals, design, and program theory, 2) the

impact of design and process on the overall and the daily experience of students and staff, 3) preliminary impact on student motivation and achievement, and 4) preliminary impact on the ability of the program to attract and retain students in the Pittsburgh Public Schools. To measure these outcomes, EPI collects archival student data from the school and developed student, teacher, and parent surveys. *Contact:* Mr. Sam Franklin, Executive Director of the Office of Teacher Effectiveness, Pittsburgh Public Schools, 341 S. Bellefield Avenue, Room 312, Pittsburgh, PA 15213 (412-622-3786; [Sfranklin1@pghboe.net](mailto:Sfranklin1@pghboe.net)).

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

EPI served as the external evaluator in Lawrence and Jones Counties for this federally-funded initiative, which served to unite early childhood services, schools, mental health, juvenile justice, and law enforcement to promote safe community and school environments and healthy child development, by preventing violence and drug use. EPI developed the program logic model, evaluation plan, and survey instruments; oversaw the collection of field data; and analyzed and reported data in response to Government Performance and Results Act (GPRA) measures and project-level objectives. As part of this evaluation, EPI conducted monthly technical assistance visits with project staff and an annual three-day site visit to evaluate implementation. Outcomes included decreases in disciplinary actions (i.e., school-based and within the courts), physical fighting/violence, absences due to fears for safety, alcohol and drug use, and teen pregnancy and increased access to mental health services. *Contact:* Ms. Elizabeth Woods, Project Director, Lawrence County School District, 346 Thomas E Jolly Drive, Monticello, MS 39654 (601-587-2506; [ewoods@lawrence.k12.ms.us](mailto:ewoods@lawrence.k12.ms.us)).

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

EPI was contracted by the St. Vrain Valley School District to plan and execute an implementation and outcome evaluation of their i3 grant. This project targeted one feeder in the district (i.e., one high school, two middle schools, and four elementary schools) which are Title I schools with a high proportion of Hispanic and English Language Learner (ELL) students and struggle with low achievement. At the elementary level, the project

targeted reading; at the middle schools, math; and at the high schools, a STEM path and certificate. At the center of the initiative is a student-focused, data-based decision-making process to screen students, target instruction, and make adaptations where needed. EPI worked to develop an evaluation plan, measures, and analyzed the extent of implementation of each component as well as student outcomes (e.g., achievement at all levels, graduation, enrollment in college) in targeted and matched comparison schools as well as sustainability and dissemination of the project. *Contact:* Regina Renaldi, Director of Title I Schools and Project Director, St. Vrain Valley School District, 395 South Pratt Parkway, Longmont, CO 80501 (303-682-7211; [Renaldi\\_Regina@stvrain.k12.co.us](mailto:Renaldi_Regina@stvrain.k12.co.us)).

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

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

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

EPI conducted a study of eight mid-sized Alabama school districts to identify the type of evidence on impact used in selecting and evaluating professional development initiatives. As part of this effort, EPI staff prepared an annotated bibliography of descriptive studies on processes of district-level evaluation of professional development and conducted interviews with instructional leaders, district superintendents, and the state deputy superintendent responsible for professional development to

determine how districts identify areas of need for professional development, how professional development activities are chosen, and how activity implementation and outcomes are monitored. A report presenting these findings of this study was published in October 2009 and can be found at

[http://www.educationalpolicy.org/publications/pubpdf/EBE\\_436\\_Eval%20PD\\_AL.pdf](http://www.educationalpolicy.org/publications/pubpdf/EBE_436_Eval%20PD_AL.pdf). *Contact:* Dr. Wendy McColsky, Program Director, SERVE (336-315-7432; [wmccolsk@serve.org](mailto:wmccolsk@serve.org)).

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

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

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

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

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

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

#### **Newport News Public Schools Teaching American History (TAH) Evaluation, Newport News Public Schools (2009-2014)**

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

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

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

#### **Richmond County Public Schools Teaching American History (TAH) Evaluation, Richmond, VA (2010)**

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

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

EPI was contracted as an external evaluator for three separate evaluation components (see below) for this state-funded NCLB Title II Improving Teacher Quality grant. This multi-district initiative seeks to improve the use of evidence-based adolescent literacy strategies. *Contact:* Dr. Jan Rozzelle, Executive Director, School-University Research Network, College of William

and Mary, P.O. Box 8795, Williamsburg, VA 23187-8795 (757- 221-2336; [mjrozz@wm.edu](mailto:mjrozz@wm.edu)).

**Division Leadership Support Team Project (2010-2011).** EPI was contracted to assess the quality of the training provided to regional division coaches, effectiveness of the coaching provided to schools, and the fidelity of division plan implementation. EPI conducted an ongoing formative evaluation which informed the project co-directors whether the program was implemented as planned and whether expected progress was made. Assessments of outcomes were derived from surveys regarding training and coach factors (e.g., knowledge, efficacy), observations of trainings and coaching, review of time and effort logs completed by coaches, and interviews and focus groups with directors and coaches.

**Evaluation of Let's Talk about Leadership and Learning Professional Development Initiative (2009-10).** This program coached school administrators to conduct classroom observations to collect specific data on use of literacy strategies and provided specific, formative feedback to teachers. Among its tasks, EPI collaborated with project staff on the development of data collection instruments, analyzed data, and produced interim and summative reports. These reports summarized: the quality and frequency of observations and instructional feedback given to teachers, knowledge of highly effective instructional strategies for increasing adolescent literacy and mathematics achievement, teacher reflection through the provision of observational data, and technology use.

**Summative Evaluation of Adolescent Literacy Professional Development Initiative (2008).** The goal of this initiative was to improve adolescent literacy across core subjects in high-poverty middle schools across south-eastern Virginia through the consistent use of highly effective instructional strategies and the development of both administrator and teacher leadership capacity. EPI analyzed data collected through surveys, interviews, classroom observations, student assessments, and teacher lesson reviews. Outcomes examined were teacher attendance and participation, teacher knowledge of evidence-based instructional strategies, teacher participation in learning communities, administrator instructional leadership, and student achievement.

#### **Impact Analysis of the Knowledge is Power Program, KIPP Foundation (2005)**

KIPP schools are tuition-free, open-enrollment, college preparatory public schools, serving high-need communities. EPI conducted a preliminary impact evaluation of the KIPP Schools by comparing school-level Stanford 9 and Stanford 10 (SAT) data supplied by the KIPP Foundation to national growth on this test. The study found that 5th-grade cohorts at KIPP schools posted greater than average academic gains on the SAT reading, language, and mathematics testing, a finding consistent with prior research on KIPP schools. EPI published this report in August 2005 and can be found at <http://www.educationalpolicy.org/pdf/kipp.pdf>. Contact: Mr. Steve Mancini, Public Affairs Director, KIPP Foundation (415-531-5396; [smancini@kipp.org](mailto:smancini@kipp.org)).

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

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

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

EPI served as the external evaluator for the Innovative Support for Transitions and Educational Preparation (I-STEP) program, supported by an Elementary and Secondary School Counseling Program grant award from the US Department of Education. This pilot project, implemented at four

high schools and their feeder schools, provided transitional supports to reduce 8<sup>th</sup> and 9<sup>th</sup> grade retentions and increased the number of students who passed the FCAT in the 10<sup>th</sup> grade. As part of its evaluation, EPI collected, analyzed, and reported data on program implementation and impact, including the effectiveness of I-STEP strategies in closing the gap between their student-to-mental health professional ratios and decreasing school-based disciplinary referrals. Contact: Ms. Teresa Stone, Grants Management, School District of Osceola County, 817 Bill Beck Boulevard, Kissimmee, FL 34744-4495 (407-870-4058, Ext. 65109; [stoneter@osceola.k12.fl.us](mailto:stoneter@osceola.k12.fl.us)).

#### **Evaluation of the Hampton GEAR UP Program, Hampton City Schools, Hampton, VA (2008-15)**

EPI served as the evaluator of the Hampton City Schools (VA) GEAR UP partnership grant, awarded in July 2008 and completed in fall 2015. This seven-year initiative supports improvements in academic rigor, STEM (science, technology, engineering, and mathematics) career exploration, and parent involvement, as well as an expansion of the district's AVID tutoring program for a double cohort of students in two high-poverty middle schools. EPI's core responsibilities in this project included survey development, technical assistance, data analysis, and preparation of annual

and biennial evaluation reports. Outcomes included increased student completion of course requirements and scoring on state testing in math and English; attendance, promotion, and graduation rates; and parent familiarity with academic and financial preparations for postsecondary education. Contact: Dr. Donna Woods, Executive Director of Secondary School Leadership, Hampton City Schools, 1 Franklin Street, Hampton, VA 23669. (757-727-2006; [dwoods@sbo.hampton.k12.va.us](mailto:dwoods@sbo.hampton.k12.va.us)).

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

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

## Postsecondary Education

The Educational Policy Institute work in postsecondary is significant. Based in part on our college access and success foundation, we have conducted significant analysis for the US Department of Education, evaluated programs at postsecondary institutions around the country, and worked with colleges to help develop strategies to retain and graduate students from their institutions.

EPI has conducted several evaluations of federal Title III and Title V projects, in addition to several projects for philanthropic organizations including TG, Bill & Melinda Gates Foundation, the European Union Centres Program, and the King Faisal Foundation. EPI continues to provide support for programs in the development of sophisticated research and evaluation designs and data analytics.

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### **Change Management Project, Seattle Colleges, Seattle, WA (2019)**

The Educational Policy Institute is conducting an evaluation of the implementation phase of Seattle Colleges' Achieving System Integration (ASI) Project, designed to transition Seattle Colleges from its current organizational structure to a more efficient and integrated system that allows it to improve services to students and the community. ASI Contact: Mr. Victor Kuo, Executive Director, Institutional Effectiveness, Seattle College, Seattle, WA (206) 934-4110; victor.kuo@seattlecolleges.edu.

### **Perkins V Needs Assessment, Valencia College, Orlando, FL (2019-2020)**

The Educational Policy Institute is working Valencia College is requesting additional funds from the state for their Perkins V project. The purpose of Perkins V is to develop the academic and career and technical skills of secondary and postsecondary students who elect to enroll in Career and Technical Education programs. The goal is for all students to achieve challenging academic and technical standards and be prepared for high-skill, high-wage, and/or high-demand occupations in current or emerging professions. EPI is conducting a Needs Assessment to help with their upcoming grant proposal. Contact: Ms. Kristeen Christian, Assistant Vice President of the Resource Development Office, Valencia College, Orlando, FL (407) 582-2909; kchristian6@valenciacollege.edu.

### **Student Longitudinal Database System (SLDS) Grant Writing, Minnesota Office of Higher Education, St. Paul, MN (2019)**

EPI was hired to write a federal Student Longitudinal Database System (SLDS) grant for the Minnesota Office of Higher Education. The MNOHE had previously received large SLDS grants in 2009 and 2015 and this is a new request to update their longitudinal data system. Contact: Ms. Meredith Fergus, Manager, Financial Aid Research and SLEDS, Minnesota Office of Higher Education, St. Paul, MN, (651) 259-3963; meredith.fergus@state.mn.us.

### **Santa Fe College Title III Evaluation, Santa Fe College, Gainesville, FL (2018-2022)**

Santa Fe College received a five-year Title III grant from the US Department of Education to promote student success through the development of

personalized learning and improvement of student success skills to increase student persistence. The project will create a comprehensive Learning Commons that employs strategies known to improve student success, such as mindset interventions, tutoring by College Reading and Learning Association (CRLA) certified tutors, co-requisite instruction for students in pivotal courses, and the creation of personalized Digital Learning Plans. The Educational Policy Institute is conducting a formative and summative evaluation of the project. Contact: Ms. Lee Delaino, Title III Coordinator, Santa Fe College, (352) 281-9217; lee.delaino@sfcollge.edu.

### **Wilmington College Title III Evaluation (2017-2021)**

The Educational Policy Institute was hired by Wilmington College in Ohio to conduct a five-year evaluation of their federal Title III Part A — Strengthening Institutions grant from the Department of Education. The Title III Part A program helps eligible Institutes of Higher Education to become self-sufficient and expand their capacity to serve low-income students by providing funds to improve and strengthen the academic quality, institutional management, and fiscal stability of eligible institutions. EPI is working closely with the staff at Wilmington College to insure implementation fidelity and to measure the impact of the program over time. As well, EPI will provide technical assistance to help the project team as they invest federal resources to improve student success. Contact: Dr. Erika Goodwin, Vice President Academic Affairs, Wilmington College, OH (937-481-2241; erika\_goodwin@wilmington.edu).

### **Bergen Community College Title V Evaluation (2017-2021)**

The Educational Policy Institute was hired by Bergen County to conduct a five-year evaluation of their federal Title V Developing Hispanic Serving Institutions Grant. EPI is working closely with the staff at Bergen Community College to insure implementation fidelity and to measure the impact of the program over time. As well, EPI will provide technical assistance to help the project team as they invest federal resources to improve student success. Contact: Amy Baldassare, Title V Grant Coordinator, Bergen Community College, NJ (201-493-3750; abaldassare@bergen.edu).

### **College Success Foundation — District of Columbia (2015)**

The Educational Policy Institute served as the evaluator of the College Success Foundation – District of Columbia (CSF-DC), funded by the Bill & Melinda Gates Foundation. Since 2008, CSF-DC has provided approximately 1,200 scholarships totaling \$25 million to DC-area youth. Over 81 students have graduated from college with 700 still in the pipeline. The Educational Policy Institute conducted formative and summative evaluations of two core CSF-DC programs: the DC Achievers Scholarship Program and the HERO Program. The findings of this study helped CSF-DC improve the efficacy of their programs and become self-sufficient in funding. *Contact:* Chip Magid, Chair, Board of Directors College Success Foundation - DC (202-442-3555; [Magid.Chip@dorsey.com](mailto:Magid.Chip@dorsey.com)).

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

Educational Policy Institute, in partnership with Westat, conducted this \$4 million project to evaluate the Special Education Personnel Development program to determine its efficacy in meeting its goals, as well as its ability to meet service obligations. A major component of this project was the development of a web-based system to improve the efficiency and effectiveness of data collection, analysis, and reporting of data for the Scholar Data Report (SDR) and Service Obligations Tracking System (SOTS) for the Office of Special Education Programs (OSEP) across hundreds of grants to institutions of higher education. A supplementary piece of the contract was to develop a similar system for the Office of Elementary and Secondary Education's Office of Indian Education (OIE) for use with its Indian Education Professional Development (IEPD) Discretionary Grant Program. *Contact:* Dr. Bonnie Jones, Research to Practice Division, Office of Special Education Programs, U.S. Department of Education, Washington, DC (202-245-7395; [Bonnie.Jones@ed.gov](mailto:Bonnie.Jones@ed.gov)).

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

Educational Policy Institute was hired to assess the geographic and demographic characteristics, higher education interests and delivery

medium preferences, and student trends and perceptions in the Commonwealth of Virginia and surrounding states as they relate to Old Dominion University's plans to effectively target student enrollment and retention. The goal of the project is to help ODU optimize course offerings and meet enrollment targets among specific student populations, effectively plan facilities use to meet growing demands for specific programs, increase the academic profile of ODU, and successfully recruit and retain the students necessary to warrant expansion of satellite locations, and accurately predict numbers of potential students in each market. To do this, Educational Policy Institute conducted a thorough and comprehensive demographic profile analysis and developed a market analysis based on surveys, focus groups, and recruitment studies. The final product helped ODU direct recruitment and marketing efforts for ODU for many years beyond this project. *Contact:* Scott Harrison, Associate VP for Administration, Old Dominion University, Norfolk, VA (757-683-6702; [sbharris@odu.edu](mailto:sbharris@odu.edu)).

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

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

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

In partnership with The Evaluation Partnership Limited, EPI contributed to an international evaluation of the European Union (EU) Centres Initiative. This international initiative, spanning the US, Canada, Japan, Korea, Australia, New Zealand, and Singapore, aims to promote a greater understanding of the EU, its institutions, and policies through the establishment of EU Centres at universities providing information and educational activities. Currently, there are 26 EU Centres in 8 industrialized countries, including 10 in the US and 5 in Canada. The international evaluation assesses the extent to which the Centres meet their specific objectives and examines the desirability and feasibility of continuing the initiative. EPI acted as a local consultant in Canada and the US and led site visits to Centres. Following the visits, a report for each site was provided summarizing the findings and providing recommendations for possible revision of the format. EPI also contributed to the final evaluation report. *Contact:* Andrea Kobilsky, The Evaluation Partnership Limited, 83 Baker Street, London, United Kingdom W1U 6AG (+44 (0) 20 7034 7026; [Andrea.Kobilsky@evaluationpartnership.com](mailto:Andrea.Kobilsky@evaluationpartnership.com)).

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

EPI conducted a series of analyses using multiple databases including: the Beginning Postsecondary Students (BPS), National Student Clearinghouse (NSC), KHE archival, and multiple state income and employment datasets. In addition, EPI conducted a survey of first-time postsecondary students in a 2003-04 cohort to facilitate comparisons of KHE students to the national 2003-04 BPS cohort, using the six-year (2009) follow-up. Statistical analyses were conducted to compare student degree completion; students' pathways from their initial enrollment in Kaplan to their attainment of degree; short, medium, and long-term cohort default rates; employment; and wages for students attending KHE to other higher education sectors. A report was provided to KHE summarizing the findings on each of these outcomes. BPS comparisons for 2009, and therefore a report, are pending until the release of these data. *Contact:* Mr. Steve Erlebacher, Vice President, Kaplan Higher Education Corporation, 311 S. Wacker, Suite 3300, Chicago, IL 60606 (312-385-1220; [serlebacher@kaplan.edu](mailto:serlebacher@kaplan.edu)).

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

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

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

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

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

EPI utilized a mixed-methods approach to explore the ways in which college access organizations partner with higher education institutions to get students into and persisting in college. Through national survey of college access programs, EPI will develop a directory of all college access respondents and will highlight the population they serve, the location and mode of service delivery, and the funding mechanisms which support these programs. Based on the survey responses, EPI will also follow-up with selected programs and develop an in-depth case study to identify and describe successful programs, common practices, and promising practices

to be replicated at other sites. Contact: Kristin Boyer, Director of Public Benefit Grants, TG, EDALL/3-4, 3500-C Wadley Place, Ste. 303, Austin, TX, 78728-1244 (512-219-4990; [kristin.boyer@tgslc.org](mailto:kristin.boyer@tgslc.org)).

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

EPI was contracted by Ohio Dominican University to serve as the evaluator of its federally-funded Title III — Part A, Strengthening Institutions grant, which supports institutions of higher education serving low-income students by providing funds to improve and strengthen the academic quality, institutional management, and fiscal stability of eligible institutions. Ohio Dominican is focusing on improving its freshman retention rate and overall retention rate of African American students. As part of the grant evaluation, EPI conducted quarterly focus groups with faculty, students, administrators, and staff regarding implementation and collects archival data on student outcomes. EPI prepared a final summative evaluation report on the implementation as well as student retention and achievement outcomes. Contact: Mr. Jamie Caridi, Vice President for Student Development and Dean of Retention, Ohio Dominican University, Columbus, OH (614-251-4595; [caridij@ohiodominican.edu](mailto:caridij@ohiodominican.edu)).

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

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

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

This international study reviewed tuition and fee policy changes and strategies in five countries and nine jurisdictions. The purpose of the review

was to gain insight into the impact of various tuition policies around the world in terms of enrollment, participation, and tuition pricing. Therefore, EPI collected and analyzed data on fees, enrollment, public post-secondary expenditures, and post-secondary participation rates from each jurisdiction. To the extent possible, data preceding and following the policy changes were collected in an attempt to define the trend. A case study methodology was used to illustrate the impact of tuition policy on enrollment however freezing, reducing, or introducing tuition fees could not be predictably linked to enrollment trends. This report was published in May 2004 and can be found at <http://www.educationalpolicy.org/pdf/tuitionpolicy.pdf>. (CMSF was disbanded in 2009).

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

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

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

The MESA Project was a four-year, \$4 million research project ran by EPI with the collaboration of the Queen's University School of Policy Studies and Acumen Research. The project aimed to measure the impact and cost effectiveness of bursaries for low-income students on access to and persistence in postsecondary education. EPI took three steps in completing

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

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

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

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

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

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

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

<http://www.educationalpolicy.org/pdf/CaliforniaTrendsInStudentAid.pdf>.

## Policy Analysis

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At its core, EPI is a policy unit. All our work on research and evaluation still revolves around the core principles involving education policy at the local, state, and federal level. What we learn in our work with schools, institutions, and other stakeholders is how well certain programs and strategies work. And sometimes we find that the status quo doesn't always work well for public policy.

Our work has focused on broad areas, including college affordability and access, gambling addiction, students with disabilities, and college counseling. Our hope is always to illuminate issues to provide more transparency and better answers to complex policies challenges.

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## PROJECT ABSTRACTS

### **Evaluation of Gambling Addiction Treatment Services in Colorado (2016)**

EPI conducted an evaluation to determine the need for gambling addiction treatment services in Colorado. Working with the Colorado Department of Human Services—Office of Behavioral Health, this evaluation measured the supply and demand of gambling addiction treatment services and the financing structures for these services throughout the State of Colorado. The findings of this evaluation were used to inform Colorado policymakers and stakeholders funding and prevalence of gambling addiction services. *Contact: Dr. Becky Helfand, Evaluation Manager Office of Behavioral Health, Data and Evaluation, Department of Human Services, State of Colorado, [Rebecca.helfand@state.co.us](mailto:Rebecca.helfand@state.co.us).*

### **Engineering Research Policy Briefs, National Action Council on Minorities in Engineering (NACME), White Plains, NY (2012)**

EPI prepared a series of research briefs for NACME on a variety of areas related to engineering education. The two-page briefs included graphs, charts, descriptions, and recommendations for action. The briefs dealt with the following areas: Latino Engineers, African American Engineers, Native American Engineers, Engineering Salaries, Engineering Education Policy, and NACME Scholars. EPI also created the camera-ready artwork using Adobe InDesign CS5.

### **National Disability Policy: A Progress Report, National Council on Disability (NCD), Washington, DC (2009)**

NCD is required by Section 401 (b) of the Rehabilitation Act of 1973, as amended, to submit annually to the President and Congress a report entitled *National Disability Policy: A Progress Report* (hereinafter referred to as the Progress Report). EPI and its subcontractor, Daniels & Associates, were contracted to provide an overview of the status of the quality of life for people with disabilities in the United States based on input from people with disabilities, and to identify the emerging trends that should point the way for future government disability policy. *Contact: Dr. Martin Gould, Director of Research and Technology, National Council on Disability, 1331 F. St., NW, Washington, DC 20004 (202-272-2112; [mgould@ncd.gov](mailto:mgould@ncd.gov)).*

### **Study of Higher Education Statutory and Regulatory Requirements in Canada, DeVry, Inc., Chicago, IL (2009)**

EPI was contracted to conduct a provincial-level study of statutory and regulatory requirements to confer online and on-site undergraduate and graduate degrees in Alberta, New Brunswick, Saskatchewan, Manitoba, Ontario, and British Columbia, Canada. To conduct this study, EPI reviewed government materials and interviewed experts in each province to gain an accurate account of the regulations and requirements for operation as a degree-granting institution. Information regarding the legal operation and credential granting, designation for financial aid, eligibility to receive clients with Labour Market Development Agreements (LMDA) program funding as well as the presence of any specific provincial funds for Aboriginal students was provided for each province. This report informed DeVry's decision-making about whether to open physical or online sites in these provinces.

### **Improving Educational Outcomes for Students with Disabilities, National Council on Disability, Washington, DC (2006-07)**

EPI and the American Youth Policy Forum conducted a joint evaluation and policy analysis of the impact of No Child Left Behind (NCLB) and the Individuals with Disabilities Education Act (IDEA) on the academic outcomes of students with disabilities and state development of infrastructure and professional development. As part of this research project, EPI conducted case studies of the ten most populous states. Work included interviews with state agency administrators, descriptive analyses of state-level achievement data and graduation and drop-out rates, state policy analysis, review of the capability of state data collection and management systems to track and provide public accountability for outcomes of students with disabilities, and a review of state-level teacher preparation programs, recruitment, and professional development in support of improved academic outcomes. *Contact: Dr. Martin Gould, Director of Research and Technology, National Council on Disability, 1331 F. St., NW, Washington, DC 20004 (202-272-2112; [mgould@ncd.gov](mailto:mgould@ncd.gov)).*

**Missouri Students and the Pathways to College, Missouri Higher Education Loan Authority (MOHELA), Chesterfield, MO (2006-07)**

EPI conducted a qualitative analysis of data collected from focus groups with students on the topic of postsecondary access. The published report presents analysis of a series of over 30 focus groups conducted in Missouri with 7th, 9th, and 11th-grade students and concerns their attitudes toward college and the future. Students were also asked to identify who and/or what influenced their postsecondary plans, as well as the potential barriers they saw to achieving their goals. Recommendations for increasing student awareness of and information about college and making decisions about their future were outlined. Contact: Mr. Quentin Wilson (formerly of MOHELA), President & CEO, ALL Student Loan, 6701 Center Drive West Suite 500, Los Angeles, CA 90045 ([qwilson@allstudentloan.org](mailto:qwilson@allstudentloan.org)).

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

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

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

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

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

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

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

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

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

EPI and the American Youth Policy Forum (AYPF) prepared a report for the National Council on Disability to assist policy leaders and stakeholders in identifying, disseminating, and aligning evidence-based outcome producing practices with the Federal Government's commitment to leaving no child behind in the attainment of a free appropriate public education. This paper was prepared as a precursor to a more detailed analysis that EPI and AYPF conducted on behalf of NCD in 2006/07 that provided additional input and recommendations to Congress and the Administration. The

paper, entitled *Improving Educational Outcomes for Students with Disabilities*, was published by NCD in May 2004. Contact: Ms. Betsy Brand, Director, American Youth Policy Forum, 1836 Jefferson Place, Washington, DC 20036 (202-775-9731; [bbrand@aypf.org](mailto:bbrand@aypf.org)).

## International Studies

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The Educational Policy Institute has been fortunate to conduct several international research projects over the years. EPI conducted several pieces for the former Canadian Millennium Scholarship Foundation, as well as projects based in the European Union, Saudi Arabia, Britain, and most recently in Bangladesh for SAVE the Children Foundation.

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## PROJECT ABSTRACTS

### **SAVE the Children Bangladesh (2014-18)**

The Educational Policy Institute has been funded by Save the Children, International to provide training and technical assistance for a Cost Effectiveness Analysis (CEA) in Bangladesh for Save the Children's READ intervention. Save the Children's READ intervention is a four-year collaboration with the Government of Bangladesh, supported by the US Agency for International Development, to improve early grade reading competence in approximately 2,800 schools located in 21 districts across 6 divisions. The goal of this contract is to increase the capacity of the local staff in conducting cost-effectiveness analysis. The training prepares the READ staff to collect, analyze and report the data.

### **OECD Teacher Professionalism using the TALIS 2013 international database (2015)**

In collaboration with FHI360 and RESULS Education Fund, EPI Senior Research Scientist Christine Harris-Van Keuren is contributing to a thematic report for the OECD on teacher professionalism in 32 countries. The objective of the thematic report is to explore how teacher professionalism manifests cross-nationally and how it affects the teachers' perceptions of the status of teaching, job satisfaction, commitment, and self-efficacy. Additionally, the paper investigated equity issues. Specifically, the authors evaluate if teacher professionalism differs across schools with varying levels of SES, second language learners, and students with disabilities. The paper was released by the OECD in 2016.

### **THET Global Partnership for Health (2015-2018)**

The Educational Policy Institute has been funded by Tropical Health and Education Trust (THET) Global Partnership for Health to conduct a cost analysis comparing the training costs of postgraduate doctor in anesthesia in South Africa, the UK, and Zambia. The objective of the contract is to determine if providing post-graduate training programs in low to middle income countries incurs a lower cost than to fund postgraduate training in regional or high-income overseas countries.

### **UNESCO Global Monitoring Report Background Paper (2014)**

With Education for All (EFA) coming to a close in 2015, stakeholders are reflecting on the progress made through this global initiative. EPI Senior Research Scientist Christine Harris-Van Keuren is the lead author on the UNESCO Global Monitoring Report Background Paper "The Changes in the Status of Teaching in Low and Middle Income Countries" due out in 2015. This paper evaluates the changes in government policies that have

contributed to the increase or decline in the prestige of the teaching occupation in primary and lower secondary public schools. Kenya, Morocco, and Indonesia are highlighted as case studies.

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

In partnership with The Evaluation Partnership Limited, EPI is contributing to an international evaluation of the European Union (EU) Centres Initiative. This international initiative, spanning the US, Canada, Japan, Korea, Australia, New Zealand, and Singapore, aims to promote a greater understanding of the EU, its institutions, and policies through the establishment of EU Centres at universities providing information and educational activities. Currently, there are 26 EU Centres in 8 industrialized countries, including 10 in the US and 5 in Canada. The international evaluation assesses the extent to which the Centres meet their specific objectives and examines the desirability and feasibility of continuing the initiative. EPI acted as a local consultant in Canada and the US and led site visits to Centres. Following the visits, a report for each site was provided summarizing the findings and providing recommendations for possible revision of the format (e.g., geographical spread and number of Centres in the network, type of measures, and improvements in the management and financial framework). EPI will also contribute to the final evaluation report. Contact: Andrea Kobilsky, The Evaluation Partnership Limited, 83 Baker Street, London, United Kingdom W1U 6AG (+44 (0) 20 7034 7026; [Andrea.Kobilsky@evaluationpartnership.com](mailto:Andrea.Kobilsky@evaluationpartnership.com)).

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

This program, initiated in September 2007, was intended to prepare Saudi and other students for the academic rigor of the new Al Faisal University. The formative evaluation of the UPP was designed to identify challenges and issues within the program and suggest improvements on the efficacy, efficiency, and ultimately, academic output of the program. EPI staff conducted an eight-day site visit, which included focus groups with students and faculty, and provided a report discussing the issues related to the UPP as evidenced by the researchers, and recommendations for improvement.

Contact: Ms. Leslie Nucho, Vice President, AMIDEAST, Washington, DC (202- 776-9624; [lnucho@amideast.org](mailto:lnucho@amideast.org)).

### **Study of Higher Education Statutory and Regulatory Requirements in Canada, DeVry, Inc., Chicago, IL (2009)**

EPI was contracted to conduct a provincial-level study of statutory and regulatory requirements to confer online and on-site undergraduate and graduate degrees in Alberta, New Brunswick, Saskatchewan, Manitoba, Ontario, and British Columbia, Canada. To conduct this study, EPI reviewed government materials and interviewed experts in each province to gain an accurate account of the regulations and requirements for operation as a degree-granting institution. Information regarding the legal operation and credential granting, designation for financial aid, eligibility to receive clients with Labour Market Development Agreements (LMDA) program funding as well as the presence of any specific provincial funds for Aboriginal students was provided for each province. This report informed DeVry's decision-making about whether to open physical or online sites in these provinces.

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

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

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

The MESA Project was a four-year, \$4 million research project ran by EPI with the collaboration of the Queen's University School of Policy Studies

and Acumen Research. The project aimed to measure the impact and cost effectiveness of bursaries for low-income students on access to and persistence in postsecondary education. EPI took three steps in completing this evaluation: (a) examined, longitudinally, the student aid files of recipients of the Access Bursaries and those who narrowly missed the criteria, and by developing and administering a survey to this same group of students and then subsequently linking the survey and the administrative file, (b) fully utilized existing databases such as Statistics Canada's Post-Secondary Education and Participation Survey (PEPS), Youth in Transition Survey (YITS), the Longitudinal Administrative Database (LAD), and the Enhanced Student Information System (ESIS), to examine the effects of student assistance on access to and persistence in postsecondary education), and (c) conducted random assignment experiments involving extra financial resources for low-income students. This was the first major research project in Canada to link student aid administrative data, survey data, and databases such as ESIS to investigate the long-term effects of grants. The findings of this project resulted in three annual reports, 16 research papers, 10 forthcoming papers, and a book. Contact: Mr. Andrew Parkin, Director of Research and Program Development, Canada Millennium Scholarship Foundation, 1000 Sherbrooke Street West, Suite 800, Montreal Quebec, H3A 3R2, Canada (514-985-0026; [aparkin@bm-ms.org](mailto:aparkin@bm-ms.org)).

### **Post-Secondary Education Career and Information Program (2003-04)**

The Educational Policy Institute was contracted by the Canada Millennium Scholarship Foundation (CMSF) to conduct research and prepare an information campaign focused on post-secondary careers for use in secondary schools across Canada. EPI conducted focus groups in Winnipeg, Manitoba and interviewed a broad cross-section of stakeholders for this project. EPI also conducted an extensive literature review. With this information, EPI prepared a detailed curriculum and information campaign for use by CMSF to help youth understand and plan for their future in the workforce, trade and apprenticeship programs, and college and university post-secondary education.

## Professional Development

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As part of our commitment to public service, EPI has produced several large conferences and seminars both in collaboration with other organizations and independently. Examples of previous conferences and training events include the following:

### **Retention 101 Certification Workshops**

EPI hosts occasional workshops for postsecondary professionals in the US and Canada. These two-day workshops are designed for higher education administrators and other stakeholders to discuss retention issues, intervention planning, implementation, and monitoring.

### **EPI Student Success Symposium**

EPI has held its Student Success Symposium since 2006, attracting thousands of postsecondary and other professionals to present about their successes on campus.

### **National Capitol Summit**

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

## SwailLandis Consulting



**SwailLandis** is a subsidiary of the Educational Policy Institute providing campus-based consulting to institutions of higher education. Our professionals have worked with hundreds of institutions over the years to improve student attainment and overall efficiencies in a competitive and global environment.

It is our goal to help institutions with strategic planning with a student-centric vision in order to improve institutional success. Our expertise in strategic planning, research and evaluation, auditing, branding and market analysis, and predictive analytics, allows us to bring to you a comprehensive set of solutions to help you and your institutional team plan and execute a student success system. Working with **SwailLandis** experts allows institutions to utilize cutting edge solutions for your institutional needs.

**[www.swailandis.com](http://www.swailandis.com)**



## EPI Leadership

**WATSON SCOTT SWAIL** is the Founding President and Senior Research Scientist of the Educational Policy Institute. Since 2002, Dr. Swail has served as the Principal Investigator (PI) of over 70 research and policy studies totaling over \$14 million on issues across the education spectrum, from early childhood reading to college preparation and access programs to postsecondary completion and workforce development. Dr. Swail also serves as a Principal in *SwailLandis*, EPI's high-level consulting firm to institutions of higher education.

Dr. Swail has been involved in Education for the past 35 years as a middle school teacher, curriculum developer, teacher trainer, graduate school instructor, policy analyst, and program evaluator. He is noted for developing the Swail Geometric Framework for Student Retention, which provides a model for institutions of higher education to improve their service to students and increase graduation rates. The model is used at institutions around the world in their strategic planning.

He has conducted research for dozens of organizations, including the Lumina Foundation, Bill & Melinda Gates Foundation, Alfred P. Sloan Foundation, The Ford Foundation, the US Department of Education, and institutions of higher education and school districts across the US and Canada. He is a frequent keynote speaker at conferences and professional development workshops on issues of educational opportunity, college access and affordability, and future issues in education. He has also helped raise over \$100 million for state projects since 2002.

Dr. Swail is a prolific writer with an occasional blog (The Swail Letter; [www.theswailletter.com](http://www.theswailletter.com)). He has published several books, including *The Student Success Papers* (2019), *From Thought to Action* (2019), *Stop Making Sense: A Collection of Thoughts and Other Random Musings on Education* (January 2018), *Educated Thoughts* (2015), *Finding Superman: Debating the Future of Public Education in America* (2012), *Retaining Minority Students in Higher Education* (2003), and *Memory, Reason, and Imagination: A Quarter Century of Pell Grants* (1998).

Dr. Swail earned his doctorate in educational policy and administration at The George Washington University, a master of science from Old Dominion University, and a bachelor of education from the University of Manitoba. He is a dual Canadian and American citizen and an accomplished singer/songwriter, much less accomplished golfer and tennis player, and an avid Winnipeg Jets/Washington Capitals fan(atic).



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