

Type of Contract:

Service Agreement v1, v2 or v3

WAKE COUNTY PUBLIC SCHOOL SYSTEM

Contract Routing Form 1950

Fiscal Year (FY): 2022-23

Person to Contact : Michelle woodson Phone/Email: mwoodson@wcpss.net

Name of Contract: The HELPS Education Fund Inc. (Title I Professional Learning)

If Change Order - (Amount +/-): _____ Total Contract Amount: \$198,147.00

Board Action: (Required at \$100,000) Yes No Board Meeting Date: 9/6/22

Budget Code: multiple codes

Items of Special Note: This is a pre-route service contract. A fund balance appropriation is pending BOE approval on 9/6/22.

**To be completed by the School or Department required for all contracts \$2,500 and up
INITIAL/DATE THIS FORM AFTER YOU HAVE REVIEWED AND APPROVED THE ATTACHED CONTRACT:**

	Initial	Date	Comments
Fiscal Administrator (\$2,500 and up and all MOAs)	<u>TP</u> <small>DS</small>	<u>8/25/2022</u>	_____
Budget Manager/Principal (\$2,500 - \$9,999 and All MOAs)	<u>MW</u> <small>DS</small>	<u>8/26/2022</u>	_____
Assistant Superintendent or Area Superintendent (\$10,000 - \$99,999 and all MOAs)	<u>DC</u> <small>DS</small>	<u>8/26/2022</u>	_____
Superintendent/Chief Officer (\$100,000+ and All MOAs)	<u>EM</u> <small>DS</small>	<u>8/26/2022</u>	_____

To be completed by the Administrative Services required for all contracts \$2,500 and up

	Initials	Date	Comments
Risk Management (Insurance Review)	<u>gcb</u> <small>DS</small>	<u>8/26/2022</u>	_____
Finance Officer	<u>DN</u> <small>DS</small>	<u>8/26/2022</u>	_____
Chief Business Officer (Required ≥ \$100,000)	_____	_____	_____
School Board Attorney (As required by the Chief Officer or Superintendent)	_____	_____	_____

Non-standard contract certification - "This instrument has been preaudited in the manner required by the School Budget and Fiscal Control Act. G.S. 115C-441(a)

Finance Officer _____ Date _____

POR Approval _____

Pre-route contract review only. MW^{DS} 8/26/2022

DEPARTMENT NAME



Service Agreement/Contract

Justification/Negotiation Statement

Requestor's Name: Michele Woodson

Vendor's Name: Helps Education Fund 2009 Fairview Rd. Box 6667 Raleigh, NC 27628

Date: September 6, 2022

Justification (why services are required): HELPS Education Fund provides an evidence-based literacy intervention program in fluency that can be delivered by volunteers. The HELPS intervention will be trained to Title I school staff as well as volunteers in order to meet the literacy needs of students.

Scope of Services (what is being provided and measurable outcomes): HELPs small group professional learning, materials and coaching support will be provided to Title I staff in our schools to provide the small group HELPS intervention for fluency.

Negotiation (Price/terms negotiated; if bid or quote for services is not the lowest of the three quotes or submitted bids please justify):

Services billed 3 times per year, based upon completion of services.

WAKE COUNTY PUBLIC SCHOOL SYSTEM

This contract (the "Contract") is made and entered into this 6th day of September 2022, between the Wake County Board of Education (the "School System"), 5625 Dillard Drive, Cary, NC 27518, and the HELPS Education Fund, Inc., (the "Provider"), 1511 Nine Iron Way, Apt. 203, Raleigh NC 27603.

For and in consideration of the mutual promises set forth in the Contract the parties do mutually agree as follows:

1. Obligations and Representations of Parties. Provider hereby agrees to provide the following services to the School System:
 - 1.1. In accordance with Attachment A – "Proposal for Partnership between Helps Education Fund and Wake County Public School System for Adopting, Sustaining, and Scaling HELPS Small Group to Advance Students' Reading in Wake County", at designated times and sites as specifically requested and authorized by the School System.
 - 1.2. The work will be completed in a manner acceptable to the School System and in full compliance with the terms and conditions of this Contract, including any documents incorporated by reference. All agents or employees of Provider who will provide services under this Agreement will be fully qualified, possess any requisite licenses, and otherwise be legally entitled to perform the services provided, and shall exercise the skill and care customarily exercised by duly licensed and qualified providers of the same or similar services.
 - 1.3. The parties acknowledge that the Wake County Board of Education has authorized the Superintendent or his designee to enter into service contracts involving expenditures of up to \$100,000. The parties further acknowledge that the School System may perform all or part of its obligations pursuant to this Contract through the Superintendent or his designee.
2. Compensation. The School System hereby agrees to compensate Provider in the amount (not to exceed) \$198,147.00, payable in (3) installments as follows:
 - December 15, 2022, March 15, 2023, and June 15, 2023, once all services have been rendered in accordance with the terms of this Contract.
 - Invoices are due to WCPSS staff on or before November 30, 2022, February 28, 2023, and May 31, 2023.

Provider shall provide School System with invoice(s) itemized by service provided the number of hours worked and by whom, the date(s) that services were provided, and the amount owed, along with any supporting documentation that may be requested in advance by the School System. The School System shall process payments to Provider within forty-five (45) days of submission of such invoice(s).

3. Contract Funding. It is understood and agreed between Provider and the School System that the School System's payment obligation under this Contract is contingent upon the availability of appropriated funds from which payment for Contract purposes can be made.
4. Term. The services described in the Contract will be provided from 9/7/2022 through 5/31/2023, unless sooner terminated as herein provided.
5. Termination for Convenience. The School System may terminate this Contract at any time at its complete discretion upon ten (10) calendar days' notice in writing from the School System to Provider prior to the date of termination. In addition, all finished or unfinished documents and other materials produced by Provider pursuant to this Contract shall, at the request of the School System be turned over to it and become its property. If the Contract is terminated by the School System in accordance with this section, the School System will provide a prorated payment for all services performed as of the date of termination.
6. Termination for Default. At any time, the School System may terminate this Contract immediately and without prior notice if provider is unable to meet goals and timetables or if the School System is dissatisfied with the quality of services provided.
7. Insurance. Provider agrees to maintain Commercial General Liability in amount of \$1,000,000 each occurrence, \$1,000,000 each occurrence in Personal & Advertising Injury with \$2,000,000 General Aggregate, and \$2,000,000 Products/Completed Operations Aggregate. Provider shall maintain \$1,000,000 in automobile liability, and other appropriate insurance, as well as Workers Compensation in the required statutory amount for all employees participating in the provision of services under this Contract. The Wake County Board of Education shall be named by endorsement as an additional insured on the General and Automobile Liability policies. Certificates of such insurance shall be furnished by Provider to the School System and shall contain an endorsement to provide the School System at least 10 days' written notice of any intent to cancel or terminate by either Provider or the insuring company. Failure to furnish insurance certificates or maintain such insurance shall be a default under this contract

and shall be grounds for immediate termination of this Contract.

8. Taxes. Provider shall pay all federal, state and FICA taxes for all employees participating in the provision of services under this Contract.
9. Monitoring and Auditing. Provider shall maintain, during the entirety of this Contract term, including any extensions, and for three (3) years thereafter, receipts, records, and/or documents to support the following: the cost of materials purchased for Projects completed under this Contract by the Provider or its subcontractor; the number of labor hours billed by the Provider's employees and its subcontractors; the sales tax paid by the Provider and its subcontractors for materials; and the names and contact information for all of Provider's employees or subcontractors who performed work under this Contract. Provider must be able to provide this supporting documentation to the School System upon request during the Contract term, including any extensions, and within three (3) years thereafter. Provider shall cooperate with the School System, or with any other person or agency as directed by the School System, in monitoring, auditing, or investigating activities related to this Contract. Provider shall permit the School System to evaluate all activities conducted under this contract as dictated by the School System. Provider shall provide auditors retained by the School System with access to any records and files related to the provision of services under this Contract.
10. Confidentiality of Student Information. Provider agrees that all student records or personally identifiable information contained in student records that may be obtained in the course of providing services to the School System under this Contract shall be subject to the confidentiality and disclosure provisions of applicable federal and state statutes and regulations as well as the School System's policies. All student records shall be kept in a secure location preventing access by unauthorized individuals. Provider will maintain an access log delineating the date, time, agency, and identity of individual accessing student records who is not in the direct employ of Provider. Provider shall not forward to any person other than parent or the School System any student record or personally identifiable information obtained from a student record (including, but not limited to, the student's identity) without the written consent of the School System. Upon termination of this Contract, Provider shall turn over to the School System all student records or personally identifiable information about students obtained by Provider while providing services under this Contract. Nothing in this Contract gives Provider any right to access any student records or personally identifiable information.
11. Lunsford Act. Provider also acknowledges that G.S. § 14-208.18 prohibits anyone required to register as a sex offender under Article 27A of Chapter 14 of the General Statutes from knowingly being on the premises of any school. Provider shall conduct or arrange to have conducted, at its own expense, sexual offender registry checks on each of its owners, employees, agents and subcontractors ("contractual personnel") who will engage in any service on or delivery of goods to School System property or at a School System sponsored event, except checks shall not be required for individuals who are solely delivering or picking up equipment, materials, or supplies at: (1) the administrative office or loading dock of a school; (2) non-school sites; (3) schools closed for renovation; or (4) school construction sites. The checks shall include at a minimum checks of the State Sex Offender and Public Protection Registration Program, the State Sexually Violent Predator Registration Program, and the National Sex Offender Registry ("the Registries"). For Provider's convenience only, all of the required registry checks may be completed at no cost by accessing the United States Department of Justice Sex Offender Public Website at <http://www.nsopw.gov/>. Provider shall provide certification on the Sexual Offender Registry Check Certification Form (Attachment A) that the registry checks were conducted on each of its contractual personnel providing services or delivering goods under this Contract prior to the commencement of such services or the delivery of such goods. Provider shall conduct a current initial check of the registries. The sex offender registry checks shall be conducted within 30 days of Provider's execution of the Contract and prior to performing any services on School System property. In addition, Provider agrees to conduct the registry checks and provide a supplemental certification form before any additional contractual personnel are used to deliver goods or provide services pursuant to this Contract. Provider further agrees to conduct annual registry checks of all contractual personnel and provide annual certifications at each anniversary date of this Contract. Provider shall not assign any individual to deliver goods or provide services pursuant to this Contract if said individual appears on any of the listed registries. Provider agrees that it will maintain all records and documents necessary to demonstrate that it has conducted a thorough check of the registries as to each contractual personnel, and agrees to provide such records and documents to the School System upon request. Provider specifically acknowledges that the School System retains the right to audit these records to ensure compliance with this section at any time in the School System's sole discretion. Failure to comply with the terms of this provision shall be deemed a material breach of the Contract.
12. Criminal Background Checks. In addition, the Provider shall ensure that all contractual personnel who may deliver goods or perform services under this contract are approved through the School System's criminal background check, at the School System's expense. Contractual personnel must be approved prior to rendering any services under the contract, and Provider will follow the School System's instructions to ensure that the criminal background

checks are completed. The School System may assign an agent at its discretion to perform the criminal background checks. Provider further agrees that it has an ongoing obligation to provide the School System with the name of any new contractual personnel who may deliver goods or provide services under the Contract. The School System reserves the right to prohibit any contractual personnel of Provider from delivering goods or providing services under this Contract if the School System determines, in its sole discretion, that such contractual personnel may pose a threat to the safety or well-being of students, school personnel or others, or if such contractual personnel may otherwise pose a risk to the School System's operations.

13. Indemnification. Provider shall indemnify and hold harmless the School System and its agents and employees from and against all claims, actions, demands, costs, damages, losses, and/or expenses of any kind whatsoever resulting from the omission or commission of any act, lawful or unlawful, by Provider or its agents and/or employees, including but not limited to court costs and attorney's fees, incurred in connection with the defense of said matters. The parties agree that this indemnification clause is an "evidence of indebtedness" for purpose of N. C. Gen. Stat. § 6-21.2.
14. Relationship of Parties. Provider shall be an independent contractor of the School System, and nothing herein shall be construed as creating a partnership or joint venture; nor shall any employee of Provider be construed as an employee, agent, or principal of the School System. Provider shall not assign, subcontract, or otherwise transfer any interest in this contract without the prior written approval of the School System.
15. Applicable Laws. Provider shall comply with all applicable laws and regulations in providing services under this Contract. In particular, Provider shall not employ any individuals to provide services to the School System who are not authorized by federal law to work in the United States. Provider represents and warrants that it is aware of and in compliance with the Immigration Reform and Control Act and North Carolina law (Article 2 of Chapter 64 of the North Carolina General Statutes) requiring use of the E-Verify system for employers who employ twenty-five (25) or more employees and that it is and will remain in compliance with these laws at all times while providing services pursuant to this Contract. Provider shall also ensure that any of its subcontractors (of any tier) will remain in compliance with these laws at all times while providing subcontracted services in connection with this Contract. North Carolina law will govern the interpretation and construction of the Contract. Provider shall comply with the Affordable Care Act and accompanying IRS and Treasury Department regulations.
16. Provider's Representations. Provider represents that as of the date of this Contract, Provider is not included on the Final Divestment List created by the North Carolina State Treasurer pursuant to N.C. Gen. Stat. § 147-86.58. Provider also represents that as of the date of this Contract, Provider is not included on the list of restricted companies determined to be engaged in a boycott of Israel created by the North Carolina State Treasurer pursuant to N.C. Gen. Stat. § 147-86.81.

Provider is duly qualified to do business in North Carolina. If Provider is a business entity that is not registered in North Carolina, prior to beginning the services described by this Contract, Provider shall either (i) obtain a certificate of authority from the Secretary of State for North Carolina, pursuant to N. C. Gen. Stat. § 55-15-03, or (ii) provide a letter from an attorney indicating that the attorney has reviewed N. C. Gen. Stat. § 55-15-01 and determined that Provider is not required to obtain a certificate of authority pursuant to N. C. Gen. Stat. § 55-15-01(b).

17. Anti-Nepotism. Provider warrants that, to the best of its knowledge and in the exercise of due diligence, none of its corporate officers, directors, or trustees and none of its employees who will directly provide services under this Contract are immediate family members of any member of the Wake County Board of Education or of any principal or central office staff administrator employed by the Wake County Board of Education. For purposes of this provision, "immediate family" means spouse, parent, child, brother, sister, grandparent, or grandchild, and includes step, half, and in-law relationships. Should Provider become aware of any family relationship covered by this provision or should such a family relationship arise at any time during the term of this Contract, Provider shall immediately disclose the family relationship in writing to the Superintendent of the Wake County Public School System. Unless formally waived by the Wake County Board of Education, the existence of a family relationship covered by this Contract is grounds for immediate termination by Owner without further financial liability to Provider.
18. Applicable Wake County Board of Education Policies. Provider acknowledges that the Wake County Board of Education has adopted policies governing its relationship with vendors and conduct on School System property and agrees to abide by any and all relevant WCPSS policies during the term of the contract and while on School System property. WCPSS's Provider related polices can be viewed at <https://www.wcpss.net/Page/45862> and are incorporated into this Contract by reference.
19. Entire Agreement. This Contract may be amended only by written amendments duly executed by and between the School System and Provider. This Contract, including the purchase order, if any, used in connection herewith and any other document(s) expressly incorporated by reference as a part of this Contract, constitutes and expresses the entire agreement and understanding between the parties concerning its subject matter. This Contract supersedes all prior and contemporaneous discussions, promises, representations, agreements and

understandings relative to the subject matter of this contract. To the extent there may be any conflict between the four corners of this Contract and other documents incorporated by reference herein, the terms of this Contract will control. If any provision of this Contract shall be declared invalid or unenforceable, the remainder of the Contract shall continue in full force and effect.

- 20. Counterparts and Execution. This Contract may be executed in any number of counterparts, each of which shall be deemed an original but all of which together will constitute one and the same agreement. The Parties agree that scanned, faxed, and/or electronically transmitted copies of this Contract will have the same validity and force as an original, and that scanned, faxed, or electronic signatures shall be deemed original signatures for purposes of this Contract and given the same legal effect as original signatures.
- 21. Authority to Enter Contract. The person(s) executing this Contract on behalf of Provider have authority to do so as an official, binding act of Provider.

IN WITNESS WHEREOF, the parties have hereunto set their hands and seals the day and year first indicated above.

**WAKE COUNTY
BOARD OF EDUCATION**

PROVIDER

Lindsey Mahaffey, Board Chair

John, C. Begeny

This instrument has been pre-audited in the manner required by the School Budget and Fiscal Control Act. G.S. 115C-441(a).

Finance Officer

Date



Proposal for Partnership between Helps Education Fund and Wake County Public School System

for Adopting, Sustaining, and Scaling HELPS Small Group to Advance Students' Reading in Wake County

September 7, 2022, to May 31, 2023

Overview:

As a strategic way to support WCPSS students' literacy development, Helps Education Fund seeks to partner with WCPSS to offer training, coaching, and related implementation support WCPSS teachers to deliver the Helping Early Literacy with Practice Strategies for Small Groups (HELPS-SG) program. As part of the proposed scope of work, Helps Education Fund will provide evidence-based training and coaching, support all aspects of relevant data collection and data-based decision-making for students receiving HELPS-SG, complete a high-quality program evaluation of all work discussed in this proposal, and over time, prepare a select number of WCPSS teachers/district leaders to become HELPS-SG coaches and trainers for the purposes of supporting future WCPSS teachers who will learn the program. The ongoing evaluation aspects of this proposal will also allow us to collaboratively determine what aspects of the project are working well, what could be improved, and ultimately what steps are needed to ensure effective and cost-efficient training over time in HELPS-SG. Throughout the proposed scope of work, best practices from implementation and improvement sciences will be leveraged to ensure that HELPS-SG is implemented effectively and within a context that actively seeks to maintain a supportive environment despite unexpected or anticipated changes or demands on the system.

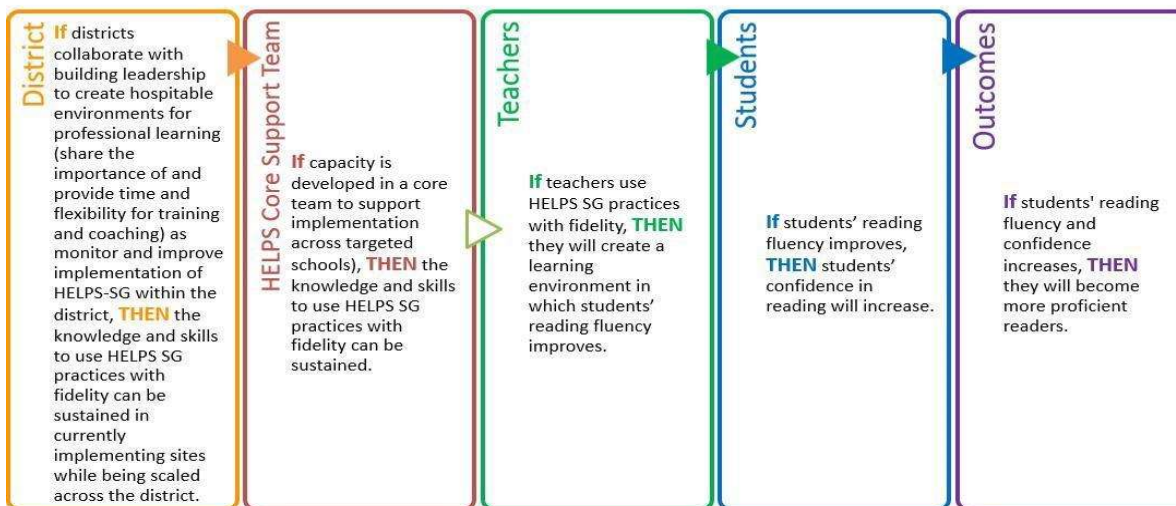
Proposal:

Helps Education Fund greatly appreciates the opportunity to address the goal of creating confident and proficient readers in Wake County. This scope of work emerges from a theory of action that begins with collaborating with district leadership to create a supportive professional learning environment for teachers so that they gain sustainable skills to advance students' reading confidence and skills. Helps Education Fund recognizes the importance of conducting careful exploration work with potential partners before moving forward with implementation of its programs. As such, prior to engaging in a partnership with the district to implement HELPS-SG, Helps Education Staff will continue conducting a series of exploration meetings with leadership and key stakeholders within the district. During the series of meetings, current students' needs will be identified and examined for their alignment with outcomes from use of HELPS-SG. Discussion also allows us to solidify the needs for training and coaching, expectations for what is needed to implement HELPS-SG with fidelity (e.g., access to data, time needed to facilitate small group sessions), and selection criteria that are helpful to identify teachers or staff to train. A final discussion point will include documentation of funding to support a portion of the costs of training and coaching or collaboration on a plan for communicating and implementing HELPS-SG within the district.

Theory of Action

Adopting, Sustaining, and Scaling HELPS SG to Advance Students' Reading

Goal: To develop the internal capacity of teachers, schools, and districts to adopt, sustain, and scale Helping Early Literacy with Practice Strategies for Small Group that **advances students' reading skills and confidence.**



This project also includes a focus on developing internal sustainability so that the knowledge and skills for training and coaching future generations of teachers to use HELPS-SG practices with fidelity is developed. Finally, attention to **how** HELPS-SG is implemented is also addressed. Importantly, this plan sequences and distributes activities in an effective, efficient, and purposeful timeline which is ultimately focused on developing the internal capacity of districts and schools to use and sustain HELPS-SG with fidelity with current and future cohorts of educators.

When collaborating with partners such as Local Education Agencies or other educational entities around training needs, we cater project goals around collectively identified specific needs, timelines, etc. Three overarching approaches serve as the foundation for this work. **First**, we will collaborate with district(s) and district-based leadership to implement HELPS-SG in ways that support the adoption, scaling, and sustainability of HELPS-SG in their setting. **Second**, we will work with teachers (or other identified staff) to develop their knowledge, skills, and abilities to use HELPS-SG with fidelity. This level of support will include Helps Education Fund staff delivering high-quality, carefully sequenced training that is built upon best practices in adult learning. Tied to this training, Helps Education Fund Implementation Coaches will provide on-going, data-based coaching supports to teachers to meet the goal of using HELPS-SG practices and skills with students with excellent fidelity so that we are most likely to see meaningful improvements in student learning outcomes. **Third**, we will support district and building level leadership and project partners in using what is learned from overall project implementation to plan for sustaining and scaling HELPS-SG across and within local education agencies in the Wake County Public School System.

With this partnership, we believe the primary shared goal between Helps Education Fund and Wake County Schools is to significantly improve the reading development and educational opportunity of students in Wake County. We hope to contribute to this impact through training, coaching, and consultation around using HELPS-SG most effectively within the learning context and (as needed) assist district staff and teachers in future planning around ongoing needs to sustain their use of HELPS-SG.

Overview of Year 1 Activities

- Provide all aspects of evidence-based training and coaching in HELPS-SG to **up to 150 teachers in 30 WCPSS elementary schools**. As such, we would plan to provide comprehensive training for approximately 5 teachers in each of the 30 schools identified to participate in Year 1.
- Conduct a **mid-year and end-of-year project evaluation** of all work completed, as well as a summary of strengths, lessons learned, and opportunities to strengthen aspects of the project. This project evaluation will be shared with WCPSS leadership and will be discussed collaboratively to ensure strong communication about project successes, challenges, and continuous improvement opportunities.

Detailed Description of Year 1 Activities:

Helps Education Fund staff will:

1. Work with district and school building leadership to identify readiness activities to support the selection and recruitment of teachers to participate in the first (and then future) cohorts of training and coaching.
 - a. Identify selection criteria for buildings and teachers who would be ready and willing to engage in learning and use HELPS-SG with fidelity with students while taking part in HELPS-SG training and coaching.
 - b. Identify what is needed to support teachers as they participate in training and coaching (e.g., time to attend training, flexibility with time for coaching, access to students with whom to implement HELPS-SG, access to student virtual folders).
 - c. Provide (through our certified HELPS-SG Implementation Coaches) virtual and/or in-person observations and coaching of teachers using HELPS-SG with students, all completed with our evidence-based COACH procedures and materials. COACH procedures and materials have routinely been shown to be effective in research and project evaluation to improve teachers' intervention fidelity, including fidelity with HELPS-SG.
 - d. Provide ways to share and collect feedback from teachers about the feasibility, effectiveness, and other experiences implementing HELPS-SG with leadership, Helps Education Fund staff, and Wake County

Public Schools as relevant. These data will inform ongoing improvement efforts.

With regard to selecting schools, we want to highlight that Helps Education Fund has secured some funding outside of WCPSS to support HELPS-SG training and implementation in schools as long as they are located within each of the 8 identified zip codes that were summarized by the funding agency as highest-need schools. The following schools are potential partners based on location within those identified zip codes.:

Zip Code	Elementary Schools Within the Zip Code
27601	Hunter Elementary Washington Elementary
27605	Partnership Elementary Wiley Elementary
27610	Barwell Road Elementary Bugg Elementary Fuller Elementary Poe Elementary Powell Elementary Rogers Lane Elementary Southeast Raleigh Elementary Walnut Creek Elementary
27615	Baileywick Elementary Lead Mine Elementary North Ridge Elementary
27616	Fox Road Elementary Harris Creek Elementary River Bend Elementary Wildwood Forest Elementary
27603	Banks Road Elementary Brentwood Elementary Smith Elementary Vance Elementary
27604	Beaverdam Elementary Conn Elementary Wilburn Elementary
27529	Aversboro Elementary Bryan Road Elementary Creech Road Elementary East Garner Elementary Rand Road Elementary Timber Drive Elementary Vandora Springs Elementary

2. Develop up to 150 teachers' capacity to use HELPS-SG with "gold standard" fidelity (that is, to implement HELPS-SG core procedures with 100% fidelity and all quality implementation characteristics with 90-100% fidelity). This will be achieved by providing teachers with in-person or virtual training and evidence-based coaching to support their use of the HELPS-SG program as intended to reach optimal outcomes. "Teachers" in this context is broadly defined as an individual (e.g., classroom teacher, interventionist, teacher for Exceptional Children) who is responsible for implementing HELPS-SG. With support from Helps Education Fund staff, 150 teachers will:
 - a. Learn to implement HELPS-SG with fidelity (which will involve teachers attending training, participating in a simulated practice session with a certified HELPS-SG Implementation Coach, and receive up to five coaching sessions);
 - b. Work towards achieving excellent intervention fidelity with the core and quality aspects of HELPS-SG; and
 - c. Learn how to use "virtual student folders" that assist them as they navigate through the HELPS-SG

program and document student attendance and performance.

3. Develop capacity of district-based leadership from WCPSS to train, coach, and support future WCPSS teachers' use of HELPS-SG with gold standard fidelity. This will be achieved by providing 3-5 identified WCPSS staff with in-person or virtual training and evidence-based coaching to support their advanced levels of knowledge, skills, and abilities that are needed to train and coach others in the HELPS-SG program. These WCPSS "District-based Implementation Coaches" are broadly defined as a WCPSS staff person (e.g., classroom teacher, interventionist, district level staff) who has been comprehensively trained by Helps Education Fund (see details in #2 above) and consistently documented gold-standard implementation of HELPS-SG. With support from Helps Education Fund, these District-based Implementation Coaches will:
 - a. Learn to identify selection criteria for teachers who are ready and willing to acquire the knowledge, skills, and abilities to use HELPS-SG with fidelity;
 - b. Learn how to use the evidence-based COACH model to provide coaching in HELPS-SG, including but not limited to collecting data that informs coaching and identifies the degree to which HELPS-SG is being used with fidelity;
 - c. Gain knowledge and skills to address advanced levels of problem solving and data-based decision making that is needed when addressing student needs that are outside those shared during training or within the training manual;
 - d. Learn how to review and use "virtual student folders" as a tool to monitor student performance and inform coaching;
 - e. Learn how to use data to monitor the impact that participation in HELPS-SG has on students' reading fluency and confidence; and
4. Be accountable for managing and monitoring implementation of HELPS-SG at the site or district level (as relevant). Provide a basic level of project evaluation that documents:
 - a. How well HELPS-SG practices were implemented as intended (i.e., teachers' implementation fidelity);
 - b. Descriptive information about teachers' use of HELPS-SG with students (e.g., total number of students served, number of HELPS-SG sessions implemented) by cohort and overall;
 - c. Teachers' satisfaction and perceptions of quality of Helps Education Fund's training and coaching and overall use of HELPS-SG with students;
 - d. Students' confidence with reading and perception of their experiences after receiving HELPS-SG by cohort and overall; and
 - e. Students' growth in oral reading fluency over the course of receiving at least 30 HELPS-SG sessions in the current school year, to the extent that the data sharing agreement allows.
5. Collaborate with district and district-based leadership as they:
 - a. Plan for implementation;
 - b. Use data to monitor and improve (as relevant) implementation;
 - c. Identify schools and teachers to receive training in HELPS-SG;
 - d. Identify teachers to train as future District-based Implementation Coaches;
 - e. Coordinate and communicate with relevant individuals (including Helps Education Fund staff) about current needs, impact, and plans to improve implementation;
 - f. Identify data sharing needs relevant to student data, teacher and student perception surveys, etc.,
 - g. Manage students' access to HELPS-SG sessions with teachers; and
 - h. Coordinate teachers' access to HELPS-SG virtual student folders and related data needs.

Note: a previous draft of this proposal also explained how Helps Education Fund can offer continued support to scale and sustain this support for WCPSS educators in the school years following Year 1, but this specific proposal focuses solely on the Year 1 plan.

Project Evaluation

Data will be collected **and used** across the life of this project to (1) improve efficiency and efficacy of implementation,(2) track completion of activities, deliverables, and processes developed, (3) monitor progress on short-term (changes in knowledge and skills) and intermediate (change in practices) outcomes, and (4) evaluate changes toward the long-term goal of advancing students' reading skills and confidence. Data collected will answer questions such as:

- Did teachers receive training and coaching as expected?
- Are trainings changing teachers' knowledge and skills leading to higher fidelity in their use of HELPS-SG

practices?

- Are the practices feasible for teachers to use with students in the current settings?
- Have HELPS-SG practices been implemented with fidelity?
- Are leadership practices supporting teachers' use of HELPS-SG?
- Is the capacity to sustain and scale HELPS-SG being developed across the district?
- Are barriers to effective and efficient implementation being communicated to leadership and then used to improve future implementation efforts?
- Did teachers describe their experiences in training, coaching, and using HELPS-SG practices as rewarding?
- On average, how many sessions of HELPS-SG did students receive?
- Did students' confidence in reading improve?
- Did students' reading fluency skills meet or exceed expected growth?

To answer these questions, Helps Education Fund staff will collaborate with district leadership to:

- Collect and summarize data that examines teacher and student perceptions of their experiences with HELPS-SG.
- Collect and summarize data that documents the fidelity with which teachers used HELPS-SG practices.
- Collect and summarize data that documents the fidelity with which teachers receiving advanced training demonstrate as they develop their skills as HELPS-SG Implementation Coaches and Trainers.
- Collect and summarize data that describes the average number of HELPS-SG sessions students received.
- Collect and examine data that monitors students' reading fluency skills (using diagnostic measures of oral reading fluency) and entry point into the HELPS-SG program (guided by the HELPS Placement Assessment) at the start of the program.
- Collect and examine follow-up reading fluency data for those students who receive at least 30 sessions of HELPS-SG so that student growth across their participation in HELPS-SG can be examined by cohort and overall. This will be provided at the extent that the data sharing agreement allows.
- Collect and summarize lessons learned across the life of this project.
- Summarize data collected in an End of Project report for Year 1 that describes activities accomplished, tutor and student feedback, and student growth for those students who participated in at least 30 sessions by July 30, 2023. (At the end of each year, we will continue the aforementioned project evaluation activities).
- Identify contextual factors in the End of Project report that facilitated or hindered use of HELPS-SG with fidelity as well as learnings to enhance future use of HELPS-SG within Wake County Public Schools as well as across other education agencies.

In collaboration with Helps Education Fund, District and District-based leadership will:

- Provide leadership, communication, and any needed assistance with identifying and fully selecting all participating schools and teachers per year so that we serve up to 150 teachers from up to 30 schools per year as well as 3-5 of those teachers who will serve as District-based Implementation Coaches. Similarly, if schools or teachers have subsequent challenges with participation in ways that are fully outside of actions that Helps Education Fund could reasonably do to support teachers (e.g., high teacher turnover or turnover with school leadership), WCPSS district leadership will work with our team collaboratively to address or minimize such challenges.
- Support students' and teachers' access to and completion of HELPS-SG feedback (anonymous) surveys sharing their experiences with HELPS-SG that will be collected at the end of each training and coaching cycle.
- Share learnings and feedback related to implementation of HELPS-SG to feed into an improvement cycle to enhance implementation.
- Share relevant data as needed including beginning, middle, and end of year student reading fluency data and all relevant demographic data (as dictated by WCPSS data sharing agreements and policies).

Summary of Key Project Goals

Helps Education Fund will analyze all aggregate data of students' reading goals and confidence as well as teachers' implementation fidelity results to document achievement of the following goals per year:

- 1) Up to 150 teachers each will receive all three modules of workshop training in HELPS-SG and each of those teachers will receive the necessary 3-5 evidence-based coaching sessions and observations to support and verify they are using HELPS-SG accurately and most effectively (that is, with gold standard implementation fidelity).

- 2) At least 90% of teachers who received 3-5 coaching sessions will reach or make progress toward demonstrating 100% accuracy/fidelity in their use of HELPS-SG.
- 3) Up to five teachers implementing HELPS-SG with fidelity during Year 1 will be selected to receive advanced HELPS-SG training and coaching to prepare them to serve as HELPS-SG Implementation Coaches and Trainers within the Wake County Public School System.
- 4) At least 95% of teachers who received advanced HELPS-SG training and coaching will demonstrate fidelity in HELPS-SG coaching and training activities.
- 5) At least 80% of students receiving HELPS-SG from their teachers will report in surveys that they enjoyed their experience with HELPS-SG and will report greater confidence in their reading.
- 6) At least 90% of teachers receiving HELPS-SG training and coaching will report in surveys that they enjoyed their experience.

Potential Impact

The potential impact of this project includes consideration of not only its effect on students but also on the changes in knowledge, skills, and abilities of district staff to improve their students' reading fluency. A few of these impacts are shared below.

- As a result of goal 1 stated above (and assuming teachers work with the 2 groups of 3-4 students), approximately 1,050 students in grades 2-5 will receive HELPS-SG during Year 1 of the project. Of note, it is feasible to consider that this number will increase as teachers who are trained during the first years will most likely continue to use HELPS-SG with students after their training and coaching cycle is completed. Further, we would expect that experienced HELPS-SG teachers could begin using the program with fidelity by serving up to 5 students per group, and if they work with two groups per year, could easily serve 9-10 students.
- Our research predicts that when students receive at least 30 sessions of HELPS-SG delivered with fidelity, 50% or more of them will exceed expected growth in reading fluency (as measured with DIBELS Oral Reading Fluency measures, a NC-endorsed and valid reading assessment administered at the beginning, middle, and end of year). As a comparison, other literacy programs that have been evaluated have shown to provide significant improvement for only 3-14% of students who receive the program, for more details on the external comparison, go to: https://bit.ly/EDNC_RCreview
- Broadening the focus of this project to include training district staff to coach and train future generations holds robust implications with not only sustaining use of HELPS-SG with fidelity but also scaling it across other schools and student populations. In addition, developing capacity of district staff to train and coach allows new generations of educators or related staff (e.g., counselors, school psychologists) to be trained to use HELPS-SG to advance students' reading fluency.

Costs and Services:

The design of our services and costs are based on our current work with school districts and nonprofits across the United States. Helps Education Fund is interested in working with schools and community organizations to find fair and cost-effective ways to support educators and students. Although we strive to offer high-quality and research-supported programs and services that are well below typical costs, we seek funding to cover our expenses (mainly personnel and materials). The following reflects projected costs for Helps Education Fund to complete the aforementioned activities and services.

YEAR ONE: (September 7, 2022 – May 31, 2023)

Item	Description
Staffing for all HELPS-SG Training and Coaching	All required staffing for project (Project Director, Project Manager, Trainers, and Implementation Coaches to support up to 150 total teachers)
Non-personnel items	150 copies of HELPS-SG materials (each set contains 1 spiral bound manual, a binder of teacher materials, and 4 copies of student materials to facilitate groups of up to 4; access to virtual software); occasional travel for in-person training/coaching, printing of the COACH coaching materials and related supplies, small snacks for teachers at in-person trainings; virtual software (e.g., Zoom); etc.
TOTAL YEAR 1 COSTS	\$198,147

Sincerely,



John Begeny, PhD

Founder and Executive Director, Helps Education Fund john@helpseducationfund.org

