Response to Quote Request:

Denver Board of Education: Engagement Firm Support

January 25, 2021

Contact:
Monica Santana Rosen, CEO
Alma Advisory Group
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Chicago, Illinois 60615
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Section A - Management Summary

Contact Person:
Monica Santana Rosen  
Chief Executive Officer  
Alma Advisory Group  
Address: 1525 E. 53rd Street, Suite 530  
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We are pleased to provide additional information about Alma Advisory Group’s (Alma’s) approach to community engagement in support of Denver Public School’s (DPS’s) Superintendent search.

The selection of a new Superintendent is undeniably the most important job a Board of Education must carry out. A new Superintendent brings the promise of leadership into the district’s next chapter of growth and development. We admire the Board’s concerted effort, not only to carry out a thoughtful and equitable search process, but to partner with the community to truly understand what is most important in the next leader’s skills, goals and ways of work.

Authentic community engagement requires its own thoughtful planning with time taken to listen to what community members, parents, students, staff and educators have to say. Equally important is the need to share back what the Board understood, what it considered, and how the community influenced key decisions. When done well, community engagement will provide insight that will lead to a better, more rigorous search process. And when community members hear their voice in the process, and feel they participated in a transparent and engaged process, the next Superintendent is set up for success from the start.

If selected to lead the search for DPS’s next Superintendent, the Alma team would be honored to also support the community engagement component of the search process. As we mentioned in our quote for the Superintendent search, we have worked in some of the most politically complex environments in education. We are experts in stakeholder engagement and will astutely advise the district on the best ways to garner input and communicate transparently with stakeholders throughout the process. Every aspect of the work we do on behalf of our clients takes stakeholder engagement into account. We credit the success, sustainability and impact of many of our projects to the stakeholder engagement that is woven throughout our work. We don’t just gather input. We co-construct with our clients and with their stakeholders in a way that is easily understood and garners trust in the work that is developed.

We welcome the opportunity to discuss our approach further with you, and we thank you for your time and consideration of our firm.

Best,

Monica Santana Rosen, Chief Executive Officer
Section B - Pricing

Budget and Invoicing Schedule

If we are selected to lead the Superintendent search, the majority of the cost of stakeholder engagement would be included in the budget already provided for the search itself. We would work with the Board to negotiate any additional fees for added effort. At this time the additional fees would not exceed $10,000 above what has already been quoted to lead the search, and we are willing to negotiate with the Board to reach an acceptable fee for both services.

The budget would be based on Alma’s total estimated time and effort, and details can be provided for the search and engagement services if we are selected.
Section C - Service Detail

About our Community Engagement Expertise
Alma’s core consulting work has been informed by over two decades of work in public education. When Alma was founded, we established a set of foundational values that guide how we approach every project we take on with and for our clients. We have codified our approach to stakeholder engagement and change management through the years that we hold true no matter how small or how large the scale of the change effort is. CEO Monica Rosen has codified Alma’s approach in the design of a session on Change Management which she has facilitated for the Broad Residency in Urban Education for the last seven years.

There are several guiding principles and core values that inform our approach:

- **Trusted relationships.** Achieving trusted relationships with our clients is at the heart of our work and central to the way we operate.
- **Contextual humility.** We abandon any preconceived notions to understand the specific needs of our clients. Once we have a clear sense of the organization’s context and what leaders are trying to solve, then, and only then, can we apply our expertise in innovative ways to make connections and find those unique solutions that help our clients reach their goals.
- **Smart strategies and change agency.** We understand the human side of change: it is inherently difficult. The best-designed and best-intentioned efforts may be rejected if the people who have to live with the change are not meaningfully engaged throughout the process.
  - We share a fundamental belief that the people on the ground have critical insight into how to implement change best. The voice and input of the people doing the work are key to successfully changing a culture or practice.
- **Transparent communication.** We engage this work with a commitment to transparent practice and open lines of communication and feedback to support informed decision-making.
- **Sustainable outcomes.** When we plan, we do so for the long-term as well as the short-term. We think through the internal capacity needed to continue to lead, sustain, and develop new practices beyond our engagement.

1. Project management structures
To support a successful community engagement process, we would seek a point of contact in the DPS Office of Family and Community Engagement (FACE) to work with us from the start of our process. Ideally one or two Board members would also remain in regular and close contact with the Alma team throughout the search, helping to direct and inform our work, and serving as a liaison with the rest of the Board.

Our team would aim to meet regularly throughout the search, as often as weekly or biweekly depending on the availability of the group and the timing of key events.

To ensure co-creation of the community engagement plan, goals, targets and strategies, the Alma team would seek to facilitate a planning session at the onset of the search with a core group of individuals, including members of the FACE team, members of the Board, and any other key leaders identified by the Board to assist in our early planning. Key decisions the group would work to generate include the following:

- The ideal frequency of communication with stakeholders on the status of the search
- Confirming key stakeholder groups and identifying the best channels for getting the word out to families, students and their caregivers, district employees, educators and school and district leaders, community members (including religious leaders and others deeply invested in DPS schools), and others.
- Identifying specific individuals to receive personal outreach or opportunities for interviews. These may include Board members, the Superintendent’s leadership team, key district partners and others.
- Confirming the timing for focus groups, surveys, and community townhalls during the search.
- Confirming key individuals within the district that can support multilingual and multimodal engagement opportunities
• Methods of garnering feedback on whether community engagement is sufficient or requires adjustment throughout the search
• Core ways to garner feedback on the Superintendent role itself, and opportunities for community members to meet finalist candidates before selection is made

The Alma team will create a community engagement plan which will then serve as the road map throughout the search. We will report on progress according to the project plan and will provide data to understand the success of community engagement efforts throughout the search.

2. **Suggested timeline of activities, major milestones and targets for the engagement process**

We offer here our guidance of what a solid engagement plan would entail, however please note that this plan is likely to be adjusted following the planning session with the district. Timing is contingent on the progress made in the search as well.

<table>
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<tr>
<th>Timing</th>
<th>Activity/Milestones</th>
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<tr>
<td>Late Jan/Early</td>
<td>Planning session with Alma and DPS leaders take place</td>
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<td>Early Feb</td>
<td>Launch communication to all stakeholder groups via DPS’s key communication channels,</td>
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<td>including social media and on a designated place on the district’s website.</td>
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<td>Communication would include an explanation of the search process, planned dates</td>
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<td>for key town hall and other community engagement events, all available opportunities</td>
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<td>to participate, how and where to receive updates, and the various ways people can</td>
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<td>offer their thoughts and feedback at any time throughout the search. Communication</td>
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<td>can go out as frequently as biweekly, providing information on the status of the</td>
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<td>search and what we have learned from our various community engagement opportunities.</td>
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<td>Establish an email address and phone number for community members to use to share</td>
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<td>questions or feedback.</td>
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<td>Create a space on DPS’s website that will be updated on at least a biweekly basis</td>
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<td>with the latest information on the search, and key opportunities to engage. Our</td>
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<td>focus will be to share key learnings coming out of community meetings, surveys and</td>
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<td>focus groups, and how they are influencing the search criteria and screening process</td>
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<td>We will also share key updates on progress of the search and next steps.</td>
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<td>Draft and translate the community survey. During this time the Alma team will work</td>
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<td>with FACE and the Board to draft the community survey and have the survey translated</td>
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<td>to maximize participation from as many community members as possible. Ideally, we</td>
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<td>would use the same survey questions for all stakeholder groups. The focus of the</td>
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<td>survey would be to gather feedback on each of the following:</td>
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<td>- What individuals perceive to be current strengths of DPS that the next Superintendent should protect and sustain</td>
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<td>- What individuals perceive to be the top areas of improvement that the next</td>
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<td>Superintendent will need to spearhead and strengthen</td>
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<td>- What is most important for the district to achieve in the next 3 to 5 years</td>
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<td>- What individuals see as the skills, knowledge and abilities most important for the</td>
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<td>next Superintendent</td>
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<td>- What individuals feel is most important for Superintendent candidates to understand about DPS; what makes the district and the community unique, what important aspects of DPS’s history or the experiences of current community members are essential to know as candidates consider pursuing the Superintendency</td>
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Mid-February

**Continue biweekly communications** as planned.

**Launch survey.** We recommend having the survey open for at least two weeks, and we may even decide to keep the survey open throughout the search and continue to monitor results.

**Town Halls Part 1 - Begin community and DPS employee town halls.** The most comprehensive approach would include opportunities for community engagement at the beginning, middle and end of the search.

We would recommend a series of community town halls at the beginning of the search to allow community members to share their feedback and ideas on the same topics described above for the survey. We would provide a report back to the community around the key ideas shared and any changes made as a result.

Ideally, we would have specific community town halls for parents, caregivers and community members. These should expand to all of the networks of schools, including Instructional Superintendents. We would work with the FACE team to provide comprehensive support for multi-language communities, including providing translation support wherever possible. In addition, we would recommend separate town halls for district employees to allow employees their own forum for hearing about the search and providing their feedback as well.

**Begin interviews and focus groups.** In addition to town halls, the Alma team can lead focus groups and interviews with key stakeholders. We can decide where it is appropriate for Board members and/or FACE team members to join, and where it is better to maintain confidentiality and have Alma facilitate alone. We may also decide to enable more meetings by splitting up and having the FACE team facilitate a portion of the focus groups and interviews without the Alma team. Individual interviews should be targeted for key leaders or stakeholders with unique points of view on the Superintendent role. These may include Board members, key members of the Superintendent’s cabinet, heads of the district’s unions, specific donors or community members closely engaged with the district, state leaders, key leaders in the community and others.

Focus groups should include groupings of individuals by role or function. These might include school leaders by network, Instructional Superintendents, central office staff, teachers, and we would recommend focus groups of students as well caregivers. Again, here we would decide where it is helpful to have Board members and FACE team members join, and where it is better to have Alma lead confidential sessions. Interviews and focus groups are only needed at the beginning of the search and are not required at later phases of the search.

Mid-March

**Continue regular communications** as planned.

**Report out the key findings** from the town halls, focus groups, interviews and surveys. This would include what adjustments were made to the job description and what skills have been prioritized or emphasized because of community input. Equally important, if there is anything that emerged as a theme in feedback that the Board is not going to incorporate, it will be important to share this and provide the rationale. Sometimes the feedback is conflicting, and the Board chooses one direction over another. Other times the Board may feel certain recommendations are not possible or practical. It’s important for stakeholders to know they were heard even if their recommendation is not followed.
Town Halls Part 2. At the midpoint of the search, it would be helpful to return to community town halls to share what we learned in all our focus groups, town halls and surveys, and how the input from the community has informed the search. This would also give individuals an opportunity to provide any additional insight, and to share feedback on the engagement of community members during the first phase of the search. Please note – sometimes organizations forgo this additional set of town halls. We would want to decide this at the start of the search if possible. We would aim to follow a similar structure to the first phase of town halls in terms of number, audience and frequency of meetings.

April - May  Continue regular communications as planned.

Town Halls Part 3. At the finalist stage of the search, we recommend community town halls for finalist candidates to meet community members. Meetings should be structured and facilitated by Alma team members. Community members should have the opportunity to submit questions in advance, which are selected by Board members, the FACE team and Alma ahead of time. We like the format of having the person who submitted the question read the question out loud during the meeting if possible.

Participants would have a survey to complete to share their feedback on each candidate. We would ask participants to focus on candidate strengths, concerns, questions and considerations for the Board. Care would be taken to ensure that participants understand the Board is the final decision maker, however their input is valued and needed.

May - June  Communicate final selection and enable virtual meet-and-greets with the selected Superintendent. Once the Superintendent is selected, the Alma team can draft the necessary updates to the community announcing the selection of the candidate. In addition, we can facilitate a series of meet-and-greet meetings for community members, staff and district leaders to meet the new Superintendent.

Deliverables
- Facilitated planning session with Board and FACE team
- Documented community engagement strategy
- Drafted and finalized survey
- Survey analysis
- Design and facilitation of town halls, focus groups and interviews
- Report out of key findings from all stakeholder engagement activities
- Design of each town hall
- Drafted content for every community update to be posted to the website

We welcome the opportunity to discuss our thinking and approach to this important work and appreciate your time and input.

3. Process and format for regular reporting of progress on engagement goals and targets.
We would recommend providing a written biweekly report for the Board on the status of community engagement, and attending Board meetings as needed to report out on our progress, and how community input is being utilized in the process. We would also report out on status during our regular weekly or biweekly check-ins with the FACE team and Board liaisons. We would set targets of % of the community reached, % of the community engaging in surveys, focus groups and interviews and % of those engaged who report feeling well-informed on the process (we can use exit polls to gather this data).
4. Firm proposal information
Monica Santana Rosen, Alma’s founder and CEO will take primary responsibility for the engagement. Additional team member resumes are included below.

References and detailed examples of our engagement experience.
Alma Advisory Group considers stakeholder engagement and change management with everything we do. We know that the sustainability and strength of any change process requires thoughtful and authentic engagement with the individuals who are most affected by the change itself. Here are three examples of our larger scale engagement efforts that align with the kind of work DPS will need to do in carrying out the Superintendent search.

Hawaii Department of Education – Leadership Institute
The Hawaii Department of Education (HIDOE) is a statewide public school district with 257 public schools and 37 charter schools with 180,000 students across eight islands. HIDOE launched a Leadership Institute in 2013, with the goal of cultivating leadership in every school. In 2014 and 2015, Monica’s team led an assessment of leadership development needs across the state, and then partnered with HIDOE leaders to articulate a 3-year strategy for leadership development. In addition, the Alma team spearheaded support for the development of HIDOE’s principal supervision model. Monica’s team helped the state plan for monthly development gatherings between the Deputy Superintendent and the principal supervisors, and then served as a critical friend to the Department as they took stock of their principal pipeline strategy. As part of this work Monica’s team helped HIDOE strengthen its leader recruitment and development strategies and improve the design of its principal preparation curriculum.

This work required a comprehensive communication and stakeholder engagement strategy that began at the point of assessment. The Alma team worked with state leaders to identify the key roles that were engaged in some way with leadership development. Our team met with and created a safe space for current school leaders to share their stories about their lived experiences progressing into leadership roles and serving as leaders in the state. We also spent significant time with aspiring leaders, with principal supervisors, with the state’s Superintendent and top cabinet, and with teachers and teacher leaders. Through our facilitation we were able to provide key insight into the top barriers to leadership development, but also the culture and climate challenges that leaders were experiencing. The Alma team adapted its facilitation approach to the unique culture and ways of collaborative decision making among Hawaiian leaders.

Based on our recommendations, we created a design team that included 35 school leaders, complex area superintendents (principal supervisors), leadership development staff, and current aspiring leaders. Together, we facilitated a process where the design team created every element of their leadership development program. This included articulating the competencies developed at each phase of the pipeline, and the key experiences that would be offered to develop leaders. More recently, Alma Advisory Group had the privilege of supporting HIDOE’s efforts to strengthen the entry and exit of the Department’s principal preparation program, enabling aspiring school leaders to demonstrate their skills and abilities, and measuring progress in leadership abilities at the end of the preparation program. The Alma team also facilitated a professional learning community among principal supervisors on neighbor islands to assess and address their unique recruitment and leader pipeline challenges. Finally, the Alma team provided coaching and support for six principal supervisors, supporting the effective use of principal supervisor meetings, and associated principal network meetings to ensure proper engagement, reflection and shared practice among principals.

Contact: Alex Harris, aharris@castlefoundation.org, (808) 263-7072, Vice President of Programs. Though many of the leaders closely engaged in this work have since left the Department, our work was funded by the Castle Foundation, and Alex Harris can speak very well to the caliber of our work, and our approach to stakeholder engagement.
Ancona Head of School Search
Though smaller in scale, the Ancona Montessori school in Chicago carried out a Head of School search that was high stakes for the community following an untimely departure of the previous leader. The Alma team led every aspect of the search, which involved the creation of a community-based search committee, the design of every aspect of the interview and screening process, and a comprehensive community engagement and approach to ensure transparency and open communication with all community members. We laid out a communication strategy similar to the one described above, and held multiple community town halls for parents, faculty and staff to help shape the search. We also reported back on how the job description and criteria for the role were adjusted based on community feedback. Some of the more vocal community members shared feedback that their voices were heard and honored in our process. We incorporated students, faculty and Board members and parents into the interview process, and the process culminated with a day and a half long finalist process for three top candidates.

Contact: Nancy Nassr, nnassr@anconaschool.org was the interim Head of the School and ultimately outperformed all other candidates for the role. She personally witnessed and experienced the nature of the stakeholder engagement strategy and can speak to our strength at managing relationships and transparency throughout the search. Creating a safe and healing space for community members to both express frustrations with the past, but also begin to shape a vision for the future, a co-constructed screening process that was performance-based, mitigated bias, and well-represented the unique culture of the school.

Prospect Schools CEO Search
The Alma team is currently leading the CEO search for Prospect Schools. This is the first CEO search for the organization, as the current Founder and CEO is stepping down from the organization. Alma is working in close partnership with a Transition Committee of the organization’s two Boards, and is directing every aspect of the community and stakeholder engagement process. This has thus far included a community survey, a series of focus groups and interviews with students, parents, faculty and leaders, a community town hall with faculty, and biweekly updates on the progress of the search. In the weeks ahead we are planning additional town halls and we are partnering with parent associations to further engage parents and families in the process.

Contact: Jordan Huller, jhuller@prospectschools.org is Alma’s key point of contact and head of HR for Prospect Schools. He has been Alma’s key point of contact. If you are interested, either Jordan or I can connect you with the Chair of the Board’s Transition Committee, Ahmed Haque, who can also speak to our engagement with the Board, our responsiveness, and our approach to communication and stakeholder engagement.

Reference Detail (and additional references if needed):

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<tr>
<th>Company Name:</th>
<th>Prospect Schools</th>
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<tbody>
<tr>
<td>Address:</td>
<td>355 Bridge Street, Brooklyn, NY 11201</td>
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<tr>
<td>Telephone:</td>
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<tr>
<td>Email:</td>
<td></td>
</tr>
<tr>
<td>Contact Person:</td>
<td>Jordan Huller, Senior Director of HR &amp; Talent</td>
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<tr>
<td>Product(s) and/or Service(s) Used:</td>
<td>Leading the CEO search and designing and facilitating community and stakeholder engagement as well.</td>
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<tr>
<th>Company Name:</th>
<th>Hillsborough County Public Schools</th>
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<tr>
<td>Contact Person:</td>
<td>Tricia McManus, Interim Supt, Winston-Salem/Forsyth County Schools (Formerly Hillsborough)</td>
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<td>Product(s) and/or Service(s) Used:</td>
<td>Designed the district’s strategy for principal pipelines, and redesigned succession planning, screening, goal setting and development at 4 stages of leadership development. Designed &amp; facilitated all stakeholder engagement.</td>
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Statement on conflicts. The Alma team would staff this effort appropriately and does not anticipate any other projects that would cause us to alter the timing of our deliverables. There are no possible conflicts of interest with this project. We hereby affirm that we have not given, offered to give, nor intend to give at any time hereafter any economic opportunity, future employment, commission, gift, loan, gratuity, special discount, trip, favor or service to the district, or any district employee, director or agent in connection with the proposal submitted. If a contract is entered into because of this request for proposals, no director, employee or agent of the contractor will enter into any non-consumer business arrangement with any director, employee or agent of the district without prior written notice.
Our Team

Monica Santana Rosen, Chief Executive Officer, was born to immigrant parents who instilled in her a deep value for education which serves as the foundation that propelled her professionally. Monica spent the last two decades working to build strong diverse workplaces and enable leaders to do great work. Her career began in philanthropy with the Tiger Foundation, where Monica was part of a team that supported nonprofits working to break the cycle of poverty in New York City. Monica later served as the Executive Director for Management Leadership for Tomorrow (MLT), an organization working to diversify leadership in the upper ranks of the public and private sectors. Monica helped launch MLT’s MBA-Prep program before pursuing her own MBA at Harvard Business School.

Monica joined Chicago Public Schools in 2004. She helped lead an HR redesign effort, and then managed and led the 65-staff member HR operational team at CPS. During her tenure, average transaction turn-around time improved from 8 weeks down to 3 days, call answer rates from 45% to 93%, and first call resolution from 45% to 75%. Monica then served as Talent Management Officer, where she focused specifically on leadership pipelines for the district. She spearheaded the redesign of a principal screening process, launched a national principal recruitment effort, and supported the strategic promotion, support and succession planning for principals. She also established the Leadership Development and Support unit, where she oversaw the district’s Principal Induction program and support for the district’s 26 Chief Area Officers (i.e., principal supervisors). In 2012 Monica launched a human capital consulting practice for Cross & Joftus, and in the fall of 2016, Monica ventured out to develop Alma Advisory Group, LLC with a talented and diverse leadership team, supporting organizations nationally to hire, develop, support and retain a high-quality workforce.

Yanika S. Daniels, Talent Cultivation and Acquisition, joined Alma in Spring 2018 after several years of independent Human Capital consulting for mid-to-large urban K12 school districts and charter management organization. Prior to consulting, Yanika was the Managing Director of Recruitment at Teach For America (TFA), where she was responsible for the Southern Regional recruitment corps member national teaching pipeline. She also served as a Regional Coach with Teach For America in Atlanta, GA. Yanika has significant experience supporting and developing school leaders as a coach for 11 regional Heads of District/School Partners, advising and serving as thought partners on district/charter relationships, human capital strategies and best practices for each region. Prior to this role, Yanika served as Director of Talent Management for the Fulton County Schools System, where she implemented a rigorous principal and assistant principal selection process for Fulton County Schools.

Yanika’s work led to the hiring of over 50 new principals and 80 assistant principals, supporting 20% turnover in school leadership over 2 years. She also designed and implemented an assistant principal leadership development program specifically to create an official district principal pipeline process. Yanika also designed and led professional development for Fulton County that dove into key performance competencies the state of Georgia outlined for all school leaders. Yanika currently serves as a Founding Board Member of a charter school in Atlanta, Georgia, overseeing human capital processes and procedures for a 6-12 charter set to open in 2017. Before moving into education, Yanika spent 9 years working in the private sector with 4 of those in management consulting specializing in process and project management. Yanika holds a Bachelor of Engineering from Vanderbilt University and a Master’s of Supply Chain Management from MIT. She is a graduate of the Broad Residency in Urban Education.
Kathleen Hartman Shiverdecker, Managing Director, Organization Design and Performance, has spent the past 25 years in various educational and human resource leadership roles in both public and private contexts. Most recently, Kathleen served as the Executive Director of School Performance in the Aurora Public Schools system in Colorado, an urban district whose on-time graduation rate has risen over 20% in the past five years. Kathleen and her team designed the school leader recruitment, interview, selection, and placement processes that have led to the identification of over 200 highly qualified principal and assistant principal candidates in the past two years. The leaders identified and matched in these processes have consistently outperformed other school leaders as evidenced by student growth and achievement outcomes. As a principal supervisor, Kathleen’s network of pilot and innovation schools led the district in highest achievement the four years she served in the role.

After teaching and leading in schools comprised primarily of students highly impacted by poverty and other risk factors, Kathleen led the STUDIO Design Team project in Aurora that resulted in a program called APS Avenues, which serves nearly 400 at-risk students in grades 6-12. In its first year, students in the Avenues program attended school nearly 90% of the time and produced GPAs in many cases two to three times higher than they had in the past.

Prior to joining the Aurora team, Kathleen led the Human Resource School Partner team as the Executive Director of Strategic Support in Denver Public Schools and, in collaboration with her team, developed data utilization and conflict facilitation protocols for HR practice in service to schools and leaders that are utilized in districts across the country. Kathleen contributed significantly to the design and implementation of the Leading Effective Academic Practice (LEAP) framework for educator effectiveness during her time in DPS. As a middle school principal, Kathleen and her staff lifted a chronically low-performing school out of turnaround status and into the performance category on the state’s performance framework in two years’ time. Kathleen has served as a cohort facilitator for aspiring leaders at Denver University in the Morgridge College of Education’s Ritchie Executive Leaders for Successful Schools program for the past ten years. Kathleen is a trained Fierce Conversations facilitator, Grief Recovery Method facilitator, and a professional photographer. She looks forward to completing her doctoral degree in May at Northcentral University in the field of Organizational Design. Kathleen earned a Bachelor of Science degree in Secondary Education, English, and French at the University of Nebraska in Lincoln, and a Master of Arts in Educational Leadership at the University of Phoenix in Colorado Springs, Colorado.

Venus Velez, Talent Acquisition, brings over 20 years of experience in the field of education, with a focus on equity and excellence. Her work has included district level reform efforts, community engagement, talent recruitment, selection and development, organizational development, non-profit management, program design and evaluation, and project management. Venus spent the earlier part of her career working in non-profit educational organizations, developing and leading college preparation programming for high school students from underserved communities. She then went on to work with the NYC Department of Education (DOE), initially supporting high school reform efforts, working with a team of school leaders to phase out larger failing campus high schools and replace them with a more successful model of new small specialized high schools.

Venus also supported the DOE’s community engagement strategy – working across the city to build support for the reform efforts and district restructuring and supporting the launch of a new parent and community engagement structure. Working closely with the Superintendent, Venus led the creation of a new parent engagement office in a region serving 139 schools. She then served as a Director in the Central Office working with the parent and community engagement teams across the city to implement engagement initiatives set out by the Chancellor. In her role, Venus led various citywide parent and community engagement programs, helped train school leaders in engagement strategies, led a citywide professional development initiative, and managed the screening, hiring process, and placement of community/parent engagement staff throughout the city. After leaving the NYC DOE, Venus continued her work in education primarily in a consulting capacity, supporting non-profit educational organizations, working on talent searches for educational leadership roles, and supporting other district level reform efforts, including supporting the redesign of the human resource department and talent management systems for Newark Public Schools and Syracuse City Schools.
Venus completed her undergraduate work at Wesleyan University, the Education Policy Fellowship Program at Columbia University, Teacher’s College, and holds an MBA from the Zicklin School of Business in New York City.

Sylvia Flowers, a native of St. Louis, is currently an Independent Education Consultant who holds a B.S. in Chemical Engineering and an M.B.A. from the Darden Graduate School of Business at the University of Virginia. Before dedicating her career to improving public education, she spent eight years in the private sector working as a chemical engineer for Monsanto and a finance profession for Duke Energy. She then joined the Broad Residency in Urban Education and began her education career in the Christina School District in Wilmington, Delaware. Sylvia also worked for Chicago Public Schools implementing the district’s first Teacher Incentive Fund grant pilot program in 40 high-needs schools. In 2009, she moved to Nashville, Tennessee and later served as the Director of Technical Assistance at the State Collaborative on Reforming Education (SCORE), a nonprofit and non-partisan advocacy and research organization founded by former U.S. Senate Majority Leader Bill Frist. Most recently, Sylvia spent seven years at the Tennessee Department of Education as the Executive Director of Educator Effectiveness and Talent, focused on implementing the state's educator education evaluation system and using human capital data to drive statewide policy, strategy, and technical support for districts in the recruitment, retention, compensation, professional growth, and recognition of effective educators.

Deborah Taylor (Debbie), Business Manager, is SHRM certified and has 20+ years in administrative office experience. She previously worked for Tangent Screen Print Inc. where she helped build the company up from its inception, developing human resources, payables/receivables, payroll, shipping, reception systems to twelve years of success before moving on to working in public education, first in the Title IX and ADA Office (now known as the Equal Opportunities Compliance Office) at Chicago Public Schools, then joining Monica in the department of Employee Services. She moved to Leadership Development in 2011, providing support for the creation of Chicago Leadership Collaborative, along with the new department Office of Network Support. Before leaving CPS in 2016, Debbie provided administrative support to three departments within Office of Network Support, along with performing Executive Assistant duties for the Independent School Principals Network.
Resumes, staff experience, training and relevant certifications for key personnel listed.

MONICA SANTANA ROSEN

Education
2002 - 2004
HARVARD BUSINESS SCHOOL
MASTER IN BUSINESS ADMINISTRATION, JUNE 2004. AWARDED THE PAUL AND DAISY SOROS FELLOWSHIP FOR NEW AMERICANS AND THE HORACE W. GOLDSMITH FELLOWSHIP FOR OUTSTANDING CONTRIBUTIONS IN THE NON-PROFIT SECTOR.

1993 - 1997
WESLEYAN UNIVERSITY
BACHELOR OF ARTS DEGREE IN PSYCHOLOGY. AWARDED THE JOSE GOMEZ IBANEZ SCHOLARSHIP FOR ACADEMIC ACHIEVEMENT, RECOGNIZED FOR EXCEPTIONAL COMMUNITY INVOLVEMENT. SEMESTER ABROAD IN PARIS, FRANCE.

Experience
2016 - Present
ALMA ADVISORY GROUP, LLC (ALMA)
CHICAGO, IL
Chief Executive Officer
Launched a human capital consulting firm with the mission of short- and long-term organizational success through the cultivation of people, practice, culture and research. Alma has 9 employees and senior associates supporting states, districts, and nonprofits in the design and implementation of large-scale human capital reforms, with an emphasis on strengthening teachers and principals who improve outcomes for their students.

2011 - 2016
CROSS & JOFTUS, LLC
CHICAGO, IL
Partner and Vice President
Launched and built a successful human capital and educator effectiveness practice serving urban school districts, states, and charter management organizations nationally. Work included HR assessment and redesign, principal pipeline strategy development and implementation, teacher recruitment, screening and retention strategy development. Client results have included 28% improvement in diversity of teacher hires, improved principal satisfaction with teacher and principal hiring, improved transparency in principal pipeline, and improved satisfaction with HR service.

2004 – 2011
CHICAGO PUBLIC SCHOOLS
CHICAGO, IL
Talent Management Officer
Led efforts to identify, recruit, develop and retain school and central office leadership. Responsible for $14 million budget and $4 million in federal and private funding partnerships. Raised an additional $1.2 million in grants.

• Spearheaded job analysis of the principal role and redesigned existing principal screening process.
• Developed and implemented new strategy for principal recruitment and placement, resulting in historic 400% growth in experienced external hires and the selection of 62 new high potential principal hires.
• Supported Chief Area Officers (i.e., principal supervisors) through principal talent management efforts, resulting in strategic support and/or exiting of persistently low-performing school leaders.
• Expanded strategy for new principal induction, revising induction curriculum, executive coaching and peer learning.
• Directed effort within Central Office to identify high performers and design new succession planning process.

2004 - 2008
OFFICER, HUMAN RESOURCES EMPLOYEE SERVICES
Selected for Broad Residency in Urban Education. Promoted within the first year to establish and run HR Employee Services, a shared service center with 65 staff and $4.4 million budget. Raised $5.5 million for HR redesign.

• Improved performance across all areas including salary change processing from 8 weeks to 3 days, call answer rates from 45% to 93%, first call/visit resolution from 45% to 75%, and medical leaves processing from 15-3 days.
• Designed department and set strategic priorities. Established team scorecard and critical success factors.
• Launched customer service initiative. As a result, HR was named most-improved department by 60% of principals.
• Supported HR organization redesign, coordinated change management efforts and PeopleSoft HR implementation.

Summer 2003
INQUILINOS BORIQUAS EN ACCION (IBA)
BOSTON, MA
Summer Associate, Catalyst Alliance (Partnered with Accenture)
Consultant to this Community Development Corporation offering broad services to 900 units of low-income housing.

• Facilitated planning sessions and completed organizational assessment. Developed five-year plan with budget and outcomes. Work resulted in $3 million capital campaign, expansion goals and 3-year expected milestones.

1998 – 2002
MANAGEMENT LEADERSHIP FOR TOMORROW
NEW YORK, NY
Executive Director
Directed all finances, operations and program development for this nonprofit program offering mentorship, career guidance and MBA application assistance to minority undergraduates and professionals. Raised over $2.7 million.

• Initiated a five-year strategic plan. Engaged the Boston Consulting Group to provide approximately $1 million in pro-bono strategic consulting. Strategic plan resulted in new program design and improved organization brand.
• Managed operational budget which grew from $250,000 to $1.2 million. Established national headquarters, developed compensation and benefits structure and team of seven to create strategic partnerships.
1998 - 1999  Program Manager
  • Spearheaded assessment and redesign of mentor program. Directed communications including website launch.

1997 - 1998  TIGER FOUNDATION  New York, NY
Grants Administrator
Administered $5 million in grants per year for this private foundation.
  • Evaluated and screened funding proposals, recommended initiatives for funding to senior management team.

KATHLEEN SHIVERDECKER

EXPERIENCE

Executive Director of School Performance, 2018-2019
Division of Equity in Learning, Aurora Public Schools
Leads the direction and supervision of the district’s schools, principals, principal supervisors, leadership development, special education, and behavior response teams to ensure the academic growth of each student and effective performance of each school. Collaborates with the Executive Director of Curriculum and Instruction, Executive Director of Student Success, and Chief Academic Officer to ensure that accountabilities and supports are effectively and equitably employed for students, teachers and leaders by engaging a vision of rigorous academic expectations and guaranteed access to high quality instruction for every student; collaborating with leaders across the district to close the opportunity and achievement gaps between student groups; ensuring that equity and the implementation of culturally relevant, research-based, metrics-driven educational practices drive instructional efforts; and ensuring and refining implementation of all instructional practices in alignment with the Colorado Academic Standards.

Selected Accomplishments
• Implemented rigorous early warning system for secondary students at risk of dropping out or falling behind in successful course completion. Result: On-time graduation rates rose from 50% in 2014 to 70% in 2019, with a significant reduction in demand for credit recovery.
• Created Strategic Response Framework to provide targeted support for underperforming schools. Result: Based on 2019 state assessment outcomes, 17 of 18 Strategic Response schools moved from single digit proficiency to double-digit proficiency in math and language arts.
• Orchestrated comprehensive leadership pipeline and professional development system to attract, inspire, and inform aspiring leaders in the system. Result: 120 current and future leaders in the district experienced the 4-day, LEAD in APS transdisciplinary learning experience with district leaders in 2019.
• Designed and launched an alternative pathways program to serve our most at-risk secondary students. Result: APS Avenues exceeded every enrollment and performance target by providing comprehensive academic, social, and emotional support to 387 students; attendance rose by 36%, and GPAs rose by an average of 2.7 points.
• Coordinated the design, development, and deployment of an online portal for leaders to access all key information and data to drive work and planning at school sites. Result: The APS School Leaders’ Playbook exists as a multi-platform application with continual updates to ensure principals have critical information to guide and support their work in schools.

Learning Community Director/Principal Supervisor, 2014-2018
Division of Equity in Learning, Aurora Public Schools, Aurora CO
Led, monitored, and supported the daily activities of 3 high schools, 2 P-8 schools, 2 alternative blended learning programs, and 1 technical college to compel students and teams toward measurable academic and post-secondary readiness outcomes. Moved the team forward toward excellence in student performance. Devised strategy that guided school leaders and leadership teams to create sustainable structures for high level academic work. Navigated complex political systems to empower leaders to engage in innovative, contemporary, and constructivist school leadership through functional human capital systems.

Selected Accomplishments
• Accelerated schools to high levels of academic growth by collaborating with principals to design professional development for teachers and to meet elevated learning targets for students. Result: In 2016, 5 of the top 10 schools with the highest growth in English Language Arts and 3 of the top 10 in math in APS belonged to this community of schools. 2 schools moved from Colorado Department of Education (CDE) School Performance Framework (SPF) rankings of Priority...
Improvement to Performance. In 2017, 2018, and 2019, this community of schools was recognized in APS as having the highest overall academic achievement.

- Engaged the APS Human Resources team to design and facilitate all aspects of school leader talent acquisition. **Result:** Interview teams, through a comprehensive screening and interview process, have identified 200+ high quality candidates prepared to compete for principal and assistant principal positions.

- Encouraged school leaders and their leadership teams in transformative culture-building between 2014 and 2019. **Result:** 9 schools achieved growth on 2015 and 2016 TELL Surveys in multiple staff-based categories with increases in positive response rate from 25% to a record level 90%.

- Guided multiple high school principals and their respective teams to increase 4-year graduation rates to 86%-94%, up 27.9% at one school in our community over the course of two years of coaching and support.

- Led the staffing plan, instructional design, site construction, and on-time opening of the Edna and John W. Mosley P-8 school. Identified experienced principal to lead site-based development of all aspects of a new school to include staffing, budget, curriculum, operations, and site design. **Result:** The Mosley team is creating a culture of performance for all students based on an Academic Resilience model; Mosley P-8 earned a state SPF ranking of Performance for 2016, 2017, and 2018.

- Facilitated the total restructuring of a chronically underperforming elementary school to move from a traditional district-run program to a high-performing charter school utilizing a shared-campus model. **Result:** Fletcher Legacy Community School is on track to become a fully integrated campus for Rocky Mountain Prep Charter by 2019.

**Executive Director of School Support, 2011-2014**

**Human Resources, Denver Public Schools, Denver CO**

Headed a team of 17 highly experienced HR partners, project managers, performance advisors, HR generalists, and school leaders to drive data-focused accountability. Provide comprehensive guidance in all aspects of staffing, performance management, talent management, and human capital processes in more than 160 schools.

**Selected Accomplishments**

- Evaluated and matched 900+ qualified teacher candidates into teaching positions for the 2013-2014 school year. **Result:** Filled 99% of all teacher vacancies with highly recommended teacher candidates by the first day of school and met 6 of 7 aggressive staffing targets.

- Created and delivered professional training for school and district leaders in staffing best practices; probationary decision-making; teacher performance management; human capital leadership and district program utilization. **Result:** Our team designed and delivered over 100 professional development sessions at over a 90% total satisfaction rate.

- Redesigned probationary teacher renewal decision-making to align with performance data. **Result:** 90% of probationary renewal decisions aligned with corresponding student performance evidence.

- Enhanced consistency in support of schools by identifying problems of practice and designing structures to narrow focus and streamline operations with principals and principal supervisors. **Result:** Based on a defined theory of action, we developed a system called Compass Points to define the team’s work and actions clearly.

**Principal, 2009-2011**

**Smiley Middle School, Denver Public Schools, Denver CO**

Analyzed student achievement and teacher performance data to enhance classroom instruction; established expectations for a positive school culture and productive learning environment; created opportunities and built capacity for leadership for students and staff; communicated frequently with members of our learning community; utilized every opportunity to propel students toward post-secondary readiness and success.

**Selected Accomplishments**

- Developed intervention model for all students in language arts and math. **Result:** Students demonstrated up to 19% growth in all tested content areas at all grade levels on the 2010 state assessment (CSAP). The upward trend continued in 2011 as Smiley’s status on the School Performance Framework (SPF) rose to the highest level since the inception of the state ranking model.

- Stabilized learning environment through consistent expectations for student attendance, safety, and behavior. **Result:** Attendance percentage rose over 10%; behavior referrals and student suspensions declined by 70%; parents, students, and teachers reported an increased feeling of confidence and safety in the Smiley learning environment. Positive responses on Colorado TELL Survey rose from 30% to 85%.
• Implemented International Baccalaureate Middle Years Programme (IBMYP) philosophy; facilitated IBMYP training for all teachers in appropriate content areas. **Result:** Successfully submitted IBMYP Application, and welcomed an authorization review team from the International Baccalaureate Organization in 2011. Smiley was ultimately offered IBMYP status in 2012.

• Strengthened school support network through intentional outreach, branding, and marketing to community; established collaborative relationships with feeder elementary schools. **Result:** Recruited 125+ new families in 2010-2011.

**Assistant Principal, 2006-2009**
**Discovery Canyon Campus, Academy School District 20, Colorado Springs CO**
Collaborated directly with P-12 Executive Principal to supervise and evaluate 175 staff members with an emphasis on math and literacy; staff hiring and evaluation; development of Teacher Advancement Program and International Baccalaureate Programme in Grades 6-8; leadership of budget, schedule, and staffing design processes.

**Selected Accomplishments**

• Devised 21st Century Learning curriculum modules for students in Grades 6-8; students experienced daily intervention and extension lessons with grade-level standards-based skill frameworks. **Result:** Students in Tier Two intervention classes achieved double-digit gains over the course of a semester in math and literacy comprehension based on common assessment and progress monitoring data.

• Implemented hybrid math program featuring integrated and foundational math components. Organized staff training; supervised and evaluated math teachers at multiple grade levels; facilitated math summer program; planned multiple levels of math tutoring for middle grades students. **Result:** 6th, 7th, 8th, and 9th grade students increased their math scores on CSAP by 12% in 2009.

• Spearheaded expansion and specification of comprehensive scope and sequence for each core content area at the middle level to include math, language arts, science, and humanities. **Result:** Students, teachers, and parents had a clear map of each student’s trajectory on a content spectrum.

• Coordinated and managed the site planning process for DCC. Utilized the Cambridge Model for Site Planning. Facilitated team of 22 stakeholders in expanding school goals, objectives, tactics, and action steps. **Result:** A combination of 200 staff members, parents, and other community members committed to joining action step planning teams to drive toward goals.

**Dean of Students, 2005-2006, Mountain Ridge Middle School, Academy School District Twenty**
**Teacher, English Language Arts, 2003-2005, Mountain Ridge Middle School, Academy School District Twenty**

**EDUCATION**

**Doctorate in Education: Organizational Design**
Northcentral University
Coursework Completion: May 2019
Degree Expected: May 2020

**Masters, Administrative Leadership**
University of Phoenix
Degree Conferred: September 4th, 2006

**Bachelors of Science, Secondary Education, English, and French**
University of Nebraska, Lincoln
Degree Conferred: December 17th, 1994

**Colorado Principal License #00114415**
Colorado Administrator (Superintendent) License, September 2019

**DEVELOPMENT**

UVA Darden/Curry Partnership for Leaders in Education Bootcamp (2017); Relay Graduate School of Education with Paul Bambrick-Santoyo (2016-2017); Adaptive Schools Foundation and Advanced Training (2015); Fierce Conversations Facilitator Certification (2014-2015); Grief Recovery Method Facilitator Certification (2015); Keynote Speaker, Tointon Leadership Academy, University of Northern Colorado (2012, 2014, 2015); Cohort Facilitator, Denver University, Executive Leaders for Successful Schools (2012-present);
Center for Creative Leadership Program Graduate (2013); Urban Schools Human Capital Academy (2011-2014); Google Talent Academy (2012-2013); Harvard Graduate School of Education Superintendent Leadership Academy (2013); DaVita Way of Leadership (2011); PhD Teacher Effectiveness Workshops (2010); Teacher Advancement Program: TAP Summer Institute and TAP Train the Trainer (2006-2008); International Baccalaureate Programme: Primary Years Programme (Category 1), Middle Years Programme (Categories 1, 2, and 3), Head of School (Category 1)
Yanika S. Daniels

WORK EXPERIENCE

K-12 and Non-Profit Consultant (Dec 2015-present) Atlanta, GA
Consults with K-12 and nonprofit clients in assessing, developing and enhancing human capital strategy, leadership development, and recruitment and selection processes as well as extensive experience in project and change management.

- **Tulsa Public Schools (OK):** Conducted talent department assessment to ensure structure, process and procedures equitably support the recruitment and retention of highly qualified staff for the district.
- **Baltimore City Public Schools (MD):** Developed executive leader selection process for the district to properly recruit and assess key executive district leaders including sourcing support for the Chief Human Capital Officer and Executive Director of Special Education.
- **Catapult Leadership (CO):** Developed 3-year strategic plan for program sustainability by leading a landscape analysis and review of program effectiveness for a non-profit leadership development program.
- **Fayette County Schools District (KY):** Conducted needs assessment of the human resources department for an urban school district to determine key target areas for HR that would strengthen the department, increase recruitment and retention of highly qualified staff to serve the needs of Fayette County students.
- **Gwinnet County Schools District (GA):** Refined and aligned professional standards for education leaders based on key leadership dispositions exhibited by successful district principals. Aligned recruitment and selection processes and mentorship programs to refined standards which lead to better identification of candidates for the district leadership development academy.
- **Denver Public Schools District (CO):** Developed 5-year strategic plan for teacher recruitment by leading a district review and assessment of teacher recruitment and selection to ensure diversity, equity and inclusion were engrained in all processes.
- **Alliance College-Ready Schools (CA):** Led development of school leader recruitment and selection process for SY2017-18 through candidate management of high potential school leaders to the district.
- **Highline Schools District (WA):** Supported district’s strategic redesign of the human resources function, establishing a Staffing Needs Assessment process and revamped the recruitment strategy to quickly attract and hire high qualified candidates.

Teach For America (July 2014 – June 2016) Atlanta, GA

- **Managing Director, Recruitment South (June 2015-present)**
  - Manager of a team of 11 direct reports responsible for recruitment at 28 major universities in the southern region.
  - Responsible for setting the vision and direction for the southern recruitment team by defining roles and responsibilities, key strategies and systems to execute on key outcomes (3500 applications started)
  - Responsible for creating a pipeline of teachers for partner districts and charter systems nationwide through undergrad recruitment. For FY16 season, met 91% of LY goal compared to RT wide 81% to FY goal.
  - Lead the RT in number of campus events, event attendees and met competitive applications goal for FY16.
  - Established and maintained a strong team culture focused on TFA’s core values ensuring 100% retention throughout the FY16 recruitment season
  - Facilitated an inclusive environment by overseeing the creation of year-long diversity, equity and inclusiveness curriculum for team members through discussion based readings and identity exploration experience to create open collaborative space

- **Managing Director, Regional Coach District & School Partnerships (July 2014-June 2015)**
  - Responsible for directly coaching 11 regional Heads of District/School Partners; advising and serving as thought partners on district/charter relationships, human capital strategies and best practices for each region.
  - Developed, led and supported three Professional Development (Immersion) learning experiences to support regional teams in cultivating champion principals and district leaders to sustain TFA’s optimal footprint and a shared vision for change; PD includes hiring operations, onboarding, principal relationships, etc.
  - Responsible for developing Hiring/Year 1 framework to onboard all Heads of District Partners within their first year with appropriate professional development and peer learning.

Fulton County Schools System: (July 2012 – June 2014) Atlanta, GA

- **Broad Resident, Director of Talent Management**
  - One of 50 participants in The Broad Residency in Urban Education, a national highly selective (5% admissions rate) two-year management development program that recruits and trains emerging leaders from private industries for senior management positions in public education.
  - Implemented a rigorous Principal and Assistant Principal Selection Process for FCS that led to the hiring of over 50 new principals/ 80 assistant principals for the SY2012-2014 year about 20% turnover in leadership.
  - Designed and implemented an assistant principal leadership development program specifically to create an official district principal pipeline process.
• Designed and led professional development for Central Office evaluation system and assistant principals on leadership development skills; trained over 500 managers on conducting performance evaluation process within the new system.

• Led the implementation, training and credentialing of performance management system, Leader Keys, for Fulton County’s principal and assistant principals evaluation. Served as district contact with the GA DOE to ensure proper implementation of the new evaluation system. Trained over 100 principals on the new system.

• Revamped the Fulton County onboarding process for all new hired employees to ensure quicker engagement of each employee into FCS culture and organization for over 1000 employees a year. Including automating all paperwork processing, detailing induction steps for hiring managers and developing a district plan for onboarding.

• Co-led and designed the New Teacher Orientation session for over 800 new Fulton County teachers a year, with professional development and induction activities to ensure all new teachers were set up for success at Fulton

PwC’s PRTM Management Consulting (June 2011-July 2012) Atlanta, GA
Managing Consultant – Health Industries Advisory
• Responsible for leading and supporting projects primarily in healthcare consulting support clients in change management, strategy design, and implementation of new processes and procedures to become more effective and efficient.

IBM Global Business Services (August 2008 – May 2011) Chicago, IL
Healthcare Managing Consultant – Supply Chain Strategy
• Responsible for leading and supporting global supply chain projects and organizational change processes for private sector commercial companies to enhance processes and procedures to become more effective.

Dell Incorporated (June 2002-July 2007) Nashville, TN
• Managed 45 technicians and 7 automated robots in Dell’s Nashville Fulfillment center producing a throughput of 17-20K computers daily while ensuring compliance and quality with all policies and procedures. Responsible for recruitment, hiring and talent management of all employees. Increased production capacity by 40%

Logistics Program Manager - August 2004–October 2005 Austin, TX
• Cross-functional liaison between Logistics, IT, Customer Care, Credit driving issue resolution and process improvement. Helping reduce process cycle time of cash flow from carrier payments for claims.

New Product Operations Engineer - July 2002–August 2004
• Managed and implemented of over 50 First-to-Market commodities into Dell’s worldwide factories by serving as interface between Dell’s worldwide factories and engineering development for product launch

EDUCATION

The Broad Center for Management of School Systems MEd in Educational Leadership May 2014
Massachusetts Institute of Technology MEng in Supply Chain Management June 2008
Vanderbilt University BS in Electrical Engineering May 2002
Emerging Human Capital Leader Initiative (Education Pioneers) Nov 2016
QUALIFICATIONS

- Over 20 years of experience in the education space.
- Management, operations, talent recruitment, program design and evaluation, student advisement, community engagement, and staff development experience.
- Strong project management skills; detail-oriented, objective-driven.
- Excellent oral and written communication skills.
- Ability to work independently or with a multi-disciplinary team.
- Graduate degree in Business.

EXPERIENCE AND SKILLS:

TALENT MANAGEMENT AND ADMINISTRATION

- Hired, trained, and directly supervised teams ranging from 2 to 8 full-time staff.
- Managed hiring and placement of regional and central staff in the parent engagement division of the NYC Department of Education.
- Provided ongoing professional development and technical assistance citywide to school-based Parent Coordinators and regional parent staff at the NYC Department of Education.
- Assisted in the development of performance assessment tools; coordinated and oversaw performance assessments for school-based, regional, and central parent staff.
- Managed a $1.2M budget.

PROGRAM MANAGEMENT AND PLANNING

- Launched several new program ideas from concept to successful implementation, including:
  - parent involvement programs,
  - two grant programs,
  - and a translation certificate program for school-based and regional parent staff at the NYC Department of Education.
- Served on Board/Management Committee driving 5-year strategic planning process.

EVENT PLANNING AND COMMUNITY ORGANIZING

- Organized and managed various citywide conferences, training programs, and events for the NYC Department of Education.
- Launched a citywide professional development event for Parent Coordinators attended by close to 1000 participants, as well as notable guest speakers, including Mayor Bloomberg and Chancellor Klein.

GROUP FACILITATION AND TRAINING

- Facilitated professional development sessions, retreats, and informational meetings for Parent Coordinators and regional parent staff at the NYC Department of Education.
- Facilitated student and parent engagement meetings throughout New York City as part of Chancellor Klein's Children First campaign for education reform in NYC public schools.
- Prepared and facilitated youth development and college preparation workshops.

EMPLOYMENT HISTORY

8/2005 – Present
Entrepreneur, COO/Project Leader – Spalding Smart Shot
Partnered with inventor of an innovative sports product to develop the product and bring it to market. Drove the project from idea inception through launch (Dec. 2016). Conducted research, created business plan and marketing materials, vetted and built a project team including lawyers, engineers, and manufacturers, identified and sought opportunities for product exposure, and helped negotiate a licensing contract with a top sports company. Continue to support product marketing and sales.

1/12-5/15, 3/18-present
Independent Consultant
Worked to support district level education reform efforts throughout the country, primarily in the area of talent management and human resources, as well as executive level searches. District projects have included: supporting the redesign of the human resource department and talent management systems for Newark Public Schools and Syracuse City School District; screening applicants for leadership development academies at Gwinnett County Public Schools; and, supporting sourcing, recruitment, and screening process for executive level positions at Tulsa Public Schools, Foundation Academies charter school organization, Civic Builders, and Baltimore City Schools.

1/14-6/14
New York Edge (formerly Sports & Arts in Schools Foundation), New York, NY
Consultant, High School Programs
Assisted Deputy Director in program evaluation; advised on improvement plans and supported implementation. Provided coaching and support to high school program staff, and worked on special projects as assigned.

1/08-3/11
ASPIRA of New York inc., New York, NY
P/T Consultant, College Preparation Program
Designed and supported the implementation of a high school college preparation program. Helped train College Coaches on helping students build college readiness skills and advising students on the college admissions process. Oversaw ongoing program assessment, development, and reporting.
3/05 – 7/06  
NYC Department of Education (DOE), New York, NY  
Director of Regional Support  
Worked with regional parent support teams to implement parent initiatives set out by the Chancellor. Provided professional development and technical assistance to regional parent staff and school-based Parent Coordinators. Managed parent involvement data and assisted in producing citywide reports. Assisted with content development for parent pages on the DOE website. Organized and managed various citywide conferences, programs, and events. Managed hiring process and placement of regional and central parent staff. Served as point of contact for human resource and union contract issues for parent staff. Served as liaison to various departments and assisted with parent outreach efforts.

3/04 – 3/05  
Director of Parent Support  
Provided direct service to New York City public school parents citywide; assisted in addressing parent concerns and questions and provided information to help parents better navigate the Department of Education. Supervised parent engagement staff and provided professional development and support to volunteer parent leaders citywide.

7/03 – 3/04  
Supervisor of Parent Support, Region 8  
Helped create and open a new Parent Support Office in the new regional structure under the Chancellor’s Children First Education Reforms. Under former Superintendent Carmen Farina, oversaw direct service to parents in Region 8 (former community districts 13, 14, 15, and 16), which consists of 139 schools. Managed a staff of 8 Parent Support Officers. Provided professional development and support to school-based Parent Coordinators and parent leaders in the region.

9/02 – 6/03  
Consultant  
Facilitated workshops for students and parents on the college and financial aid process. Facilitated student and parent engagement meetings for the Chancellor’s office. Helped support the successful opening of 4 new small college preparatory high schools in Brooklyn; assisted with community outreach, student recruitment, staff development in the area of family engagement, and provided general support to school teams.

Additional Prior Roles  
6/97 – 7/02  
Harlem Educational Activities Fund, New York, NY  
Director of High School and College Programs

9/96 – 5/97  
Albert G. Oliver Program, New York, NY  
Director of Student Programs/Acting Deputy Director

EDUCATION  
Zicklin School of Business, Baruch College, New York, NY  
Master of Business Administration, January 2003  
Concentration: Marketing Management

Columbia University, Teacher’s College, New York, NY  
Educational Policy Fellowship Program, September 1999 - June 2000

Marymount Manhattan College, New York, NY  

Wesleyan University, Middletown, CT  
Bachelor of Arts, May 1991  
Major: Government
EDUCATION
University of Virginia, Darden Graduate School of Business Administration, Charlottesville, VA
Master of Business Administration
University of Missouri, Columbia, MO
Bachelor of Science in Chemical Engineering

EXPERIENCE
Tennessee Department of Education  May 2012 to June 2019
Executive Director, Educator Effectiveness and Talent, Nashville, TN
• Managed a team of 15 in implementing the state’s educator evaluation system for teachers and school leaders, ensuring data quality, accuracy and reporting, and developing policy recommendations to improve the system.
• Led the development of district human capital data reports using educator evaluation data and provided training to district leadership teams in order to drive improvement in students’ access to effective teachers.
• Created state policy for educator compensation and differentiated pay and ensured implementation in 146 districts statewide.
• Identified and shared best practices, developed tools and resources for improving teacher and leader recruitment, selection and staffing practices in districts and schools across the state, including the launch of a statewide marketplace to match teacher and leader candidates with job openings across the state.
• Developed and implemented district technical assistance and supports for recruiting high-caliber teachers to the profession.
• Oversaw and managed the statewide programs to recognize and reward excellent teachers and leaders throughout the state.
• Directed and coordinated the implementation of two federal grants focused on performance-based compensation – Teacher Incentive Fund (TIF) and Race to the Top (RTTT).

Tennessee SCORE, State Collaborative on Reforming Education  February 2010 – May 2012
Director, Technical Assistance, Nashville, TN
• Provided project management support and oversaw business operations and finances for SCORE’s internal operations.
• Provided technical assistance, research and analysis on teacher evaluation systems, including student achievement growth as a component of a teacher effectiveness rating system.
• Led and managed the research and creation of new proposals for new public-private partnerships for SCORE to undertake in conjunction with partner organizations.
• Coordinated and convened focus groups and partner meetings with key stakeholders to gain feedback on the progress of Tennessee’s education reform efforts and to refine strategies to support stakeholders’ concerns.

Chicago Public Schools  January 2007 – March 2009
Project Manager, Chicago TAP (formerly Recognizing Excellence in Academic Leadership), Chicago, IL
• Oversaw the implementation and administration of the $27.5MM TIF grant award, the largest competitive federal grant award received by Chicago Public Schools, a pilot for teacher and principal performance based compensation.
• Directed the strategic planning, school selection, staff selection and supervision, establishment of critical procedures, budget management, and communications for the program.
• Managed the critical relationship between the Chicago Teachers Union and Chicago Public Schools in supporting the pilot, which included negotiating the Memorandum of Understanding between the two parties and leading a joint committee responsible for governance and oversight of the project.
• Supervised the Training/Support team and implementation of the Teacher Advancement Program in 20 participating schools.
• Organized and coordinated the professional development for the Chicago TAP Schools’ Leadership Teams including three weeks during the summer and monthly principal and lead teacher trainings during the School Year.

Manager, Grants, Wilmington, DE
• Oversaw the development of the Consolidated Grant Application and the implementation of plans and requirements of the Grant ($11.7MM) as well as other multi-site and single site grants.
• Managed the Supplemental Educational Services program for Title I Schools Under Improvement.
• Coordinated the implementation of the Title I programs by working collaboratively with the Title I building principals, parents, and teachers and staff of the Title I Schools.
• Provided technical assistance to and ensured requirements of the NCLB Act were met for schools under improvement, parent involvement, non-public schools, and homeless students.

Director, Training and Development, Wilmington, DE
• Organized and coordinated the professional development activities for the District including 10 District-wide In-service days per year and other offerings held throughout the School Year.
Developed and organized leadership training for over 100 members of the District Leadership Team consisting of Leadership Styles training, 360° Feedback, Malcolm Baldrige Quality, and case studies.

Facilitated district project focused on developing, documenting, and instituting processes and procedures for all important activities in several departments, such as Human Resources, Payroll, Business Office, Procurement, Facilities, and Curriculum & Instruction.

Led cross-functional team in the identification, selection, purchase and implementation of a Professional Development registration and tracking system and managed the integration of data from legacy system.

Managed the site based coaching system consisting of 26 Instructional Coaches located in 24 schools focused on New Teacher Mentoring/Induction, coaching and training teachers, providing workshops, developing curriculum, and improving the quality of teaching in the core content areas.

Supported the Curriculum and Instruction department by conducting district-wide walkthroughs to assess the implementation of professional development initiatives and provided in-depth technical support to the School Improvement Planning process by serving as school liaison from the district office.

Selected from over 300 applicants for The Broad Residency in Urban Education, an intensive leadership development program focused on building leadership and management capacity in urban school systems and charter management organizations nationwide.

Duke Energy  
Commercial Associate, Houston, TX  
July 2002 – July 2004

Developed financial models using discounted cash flow and EBITDA multiples for acquisition targets in the gas pipeline industry of up to $35MM.

Performed valuation analysis on Duke Energy International (“DEI”) assets to identify divestiture candidates and to establish retention values of those assets.

Drafted, reviewed, and edited Information Memorandums and Sale and Purchase Agreements for the sale of non-strategic assets in DEI.

Developed the 2003 budget of approximately $6.0M for Energy Services Finance and Strategic Planning

Coordinated activities relating to Duke Houston’s participation in the Disclosure Working Group of the Committee of Chief Risk Officers (“CCRO”), a coalition of energy companies formulating best practices in risk management and disclosure for the industry.

Solutia Incorporated  
August 1996 – August 2000

A $3 Billion chemical company spun off from Monsanto Company in 1997.

Senior Buyer, Essential Materials, Pensacola, FL

Managed inventories of more than 200 raw materials and scheduled deliveries for two Solutia nylon plants and seven outsourced manufacturing partners.

Led cross-functional team to reduce working capital by $1MM and consolidate precious metal catalyst purchases resulting in $50 K savings and material handling process improvements.

Developed and implemented procedures, trained 30 employees, coordinated and conducted audits in order to maintain ISO9002/QS9000 quality systems registration for Purchasing & Manufacturing Services.

Packaging Engineer and Buyer, Pensacola, FL

Managed packaging inventories of more than 100 materials and scheduled deliveries.

Leveraged and consolidated enterprise packaging purchases as a member of national sourcing teams resulting in enterprise savings of $2 MM and plant wide savings of $400 K.

Identified and evaluated new ways of packaging and handling all finished goods to reduce packaging costs and meet customer needs.

Monsanto Company  
August 1994 – August 1996

Business & Research Support Services/Engineering Purchasing, St. Louis, MO

Conducted study to identify potential suppliers for EDI/EFT resulting in a reduction of manual transactions and the addition of 50% of suppliers to Electronic Data Interchange.

Negotiated contracts for services to identify potential cost savings and consolidate supplier base.

Created performance evaluation tool to identify and maintain high performing suppliers and eliminate low performing suppliers.

OTHER

Founding Board Member, Valor Collegiate Academy, Nashville, Tennessee

Board Member, Education Pioneers, Nashville, Tennessee

Alumni Advisory Board Member, The Broad Center, Los Angeles, California, 2013-2017

Emerging Human Capital Leadership Initiative, Inaugural Cohort 2015
**Vendor Background - About Alma Advisory Group**

Alma Advisory Group, LLC (Alma) is a consulting firm with the mission of fostering the culture, people, and practices that enable staff to do their best, teams to do great work, and organizations to accomplish outstanding results. Led by founder and Chief Executive Officer Monica Santana Rosen, Alma launched in September 2016. We partner closely with our clients to understand their unique context, and the conditions that affect their ability to ensure the success of their staff. Then we work in collaboration with our clients to chart a path to solving their most pressing human capital needs, building the capacity in-house to lead and continue to strengthen their work beyond our time with them.

We believe that an organization’s success relies on PEOPLE

- A clear understanding of the kind of people the organization needs in order to thrive
- A sense of current gaps in talent, and knowledge of how future openings can help bridge those gaps
- A strategy for identifying an organization’s best people and finding ways to reward, leverage and inspire them
- A culture with the practices that support the people within the organization and help them succeed

We accomplish this aim through the following set of services:

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<tr>
<th>Talent Management Assessment</th>
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<td>• Based on client needs, we assess and develop the organization's approach to attracting, developing and keeping great staff in every role. Our approach includes gathering stakeholder perception, validated by actual organization data, together with benchmark research against local and national counterparts. Our assessment may include a review of the HR function itself, and/or analysis of core talent management strategies already in place.</td>
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<th>Talent Strategy Design, Implementation, and Team Capacity-Building</th>
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<td>• While our assessments spotlight opportunities for improvement, the work we love most is design and implementation. We serve as trusted thought partners to our clients through the improvement of talent strategies including recruitment, hiring, performance management, compensation and strategic retention. We emphasize stakeholder engagement, thoughtful change management, and internal capacity-building so that teams can lead their work beyond our time with them.</td>
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<th>Diversity, Equity and Inclusion</th>
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<td>• We help organizations build the awareness, tools and language needed to address the systems and practices that cause inequitable outcomes for students. We also help school systems ensure that their highest-need students have access to proven talent ready to meet their needs. Finally, we foster the best HR practice and organizational culture to attract, retain, and value the contributions of diverse talent throughout the organization.</td>
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<th>Leadership Pipeline, Support and Supervision</th>
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<td>• We help leadership teams better anticipate turnover among critical leadership roles, and identify and cultivate high-potential aspiring leaders to promote over time. The goal is to ensure a strong bench of potential leaders and transparent support for ambitious and high-performing staff. Our work in principal support and supervision helps school systems identify the barriers to principal success, and set up support, development and supervision so that principals can successfully lead schools.</td>
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<th>Executive Search</th>
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<td>• We support organizations through the recruitment, screening, and hiring of executive level roles. Our search efforts leverage our national network and connections with education leaders throughout the country, who offer us their unique perspective on often-unknown but effective leaders showing potential and readiness to meet the requirements of our clients’ openings. We are not a traditional search firm. The Alma team carries out each search with a focus on organizational capacity-building, so that our clients may replicate the search process without us if desired beyond our engagement.</td>
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HEREBY GRANTS

Woman Owned Small Business (WOSB) Certification to

Alma Advisory Group, LLC

The identified small business is an eligible WOSB for the WOSB Program, as set forth in 13 C.F.R. part 127 and has been certified as such by an SBA approved Third Party Certifier pursuant to the Third Party Agreement, dated June 30, 2011, and available at www.sba.gov/wosb.

The WOSB Certification expires on the date herein unless there is a change in the SBA’s regulation that makes the WOSB ineligible or there is a change in the WOSB that makes the WOSB ineligible. If either occurs, this WOSB Certification is immediately invalid. The WOSB must misrepresent its certification status to any other party, including any local or State government or contracting official or the Federal government or any of its contracting officials.

Emilia Dihlenco, Women’s Business Development Center President & CEO

Pamela Prince-Eason, WBENC President & CEO

Laura Taylor, WBENC Vice President

NAICS: 541990, 541612, 561312, 611430, 611710
UNSPSC: 60101511, 80111500, 80111501, 80111511
Certification Number: WOSB171455
Expiration Date: August 31, 2021
hereby grants

National Women's Business Enterprise Certification

to

Alma Advisory Group, LLC

who has successfully met WBENC's standards as a Women's Business Enterprise (WBE).
This certification affirms the business is woman-owned, operated and controlled and is valid through the date herein.

Certification Granted: August 24, 2017
Expiration Date: August 31, 2021
WBENC National Certification Number: WBE1701626

WBENC National WBE Certification was processed and validated by Women’s Business Development Center - Midwest, a WBENC Regional Partner Organization.

Authorized by Emilia DiMenco, President & CEO
Women’s Business Development Center - Midwest

NAICS: 541990, 541612, 561312, 611430, 611710
UNSPSC: 80101511, 80111500, 80111501, 80111511
August 24, 2020

Monica Santana Rosen  
Alma Advisory Group, LLC  
1525 E 53rd Street  
Suite 530  
Chicago, IL 60615-4575

Dear Business Owner:

Re: NCA Certification Approval Women/Minority Business Enterprise (WMBE)  
Certification Term Expires: June 21, 2021

Congratulations! After reviewing the No-Change Affidavit (NCA) information you supplied, we are pleased to inform you that your firm has been granted continued certification under the Business Enterprise Program (BEP) for Minorities, Females and Persons with Disabilities.

This certification is in effect with the State of Illinois until the date specified above as long as you continue to submit annual No-Change Affidavits and are found to still meet the requirements of the Program.

Your firm's name will appear in the State's Directory as a certified vendor with the BEP in the specialty area(s) of:

- NIGP 91838: EDUCATION AND TRAINING CONSULTING
- NIGP 91865: HUMAN RESOURCES, RELATIONS CONSULTING
- NIGP 91875: MANAGEMENT CONSULTING
- NIGP 91883: ORGANIZATIONAL DEVELOPMENT CONSULTING

Also, please be advised that this certification does not guarantee that you will receive a State contract. Please visit the Vendor Registration page on www.opportunities.illinois.gov and be sure to register with each of the Procurement Bulletins listed so that you are notified of upcoming solicitations in your NIGP codes. Certification with the Business Enterprise Program does not ensure you receive notifications; you must also register with the Procurement Bulletins.

Thank you for your participation in the BEP. We welcome your participation and wish you continued success.

Sincerely,

Carlos Gutiérrez  
Certification Manager  
Business Enterprise Program