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**OAKLAND UNIFIED  
SCHOOL DISTRICT**  
Community Schools, Thriving Students

## Board Cover Memorandum

**To** Board of Education

**From** Sondra Aguilera, Acting Superintendent  
Rebecca Lacocque, Director of Linked Learning  
Greg Cluster, Work-Based Learning Coordinator

**Meeting Date** September 14, 2022

**Subject** Services Agreement with MDRC – No Cost

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**Ask of the Board**  Approve Service Agreement  
 Ratify Service Agreement

**Services** MDRC will provide access to two online tools for career discovery and exploration and PD to support teachers' use of these tools. MDRC will also analyze longitudinal student data to evaluate impact of the tools on career interests.

**Term** Start Date: August 31, 2022 End Date: Aug 31, 2025

**Not-To-Exceed Amount** \$0

**Competitively Bid** No. This no-cost agreement is under the bidding threshold.

**In-Kind Contributions** Staff time for PD. Data Department time for furnishing data to MDRC

**Funding Source(s)** N/A. No-cost agreement.

**Background** The High School Linked Learning Office has identified this opportunity for schools to receive PD and a small stipend to try out the use of two online tools specifically designed to help students identify career paths of interest based on their aptitudes and interests.

**Attachment(s)**

- Service Agreement with MDRC
- Statement of Research Approval



Oakland Unified School District  
1000 Broadway, Floor 4  
Oakland, California 94607-4099

**Re: CTE Advise Project, Site Agreement No. 1350-OUSD-2500-01**

Welcome to the Career and Technical Education (CTE) Advising Tools (“CTE Advise” or the “Project”) study. MDRC, a nonprofit research organization, was awarded funding from U.S. Department of Education, Institute for Education Sciences (the “Funder”) under Grant No. R305A200307 (the “Prime Award”).

MDRC is enthusiastic about working with Oakland Unified School District (“District” or “Subrecipient”) on the Project. This document, which includes Exhibits A through C, constitutes the full agreement (the “Agreement”) setting forth the respective roles and responsibilities of District and MDRC for our work together to collaborate on the Project.

**1. Term.**

Unless otherwise terminated in accordance with this Agreement, the term of this Agreement will be from August 31, 2022 through August 31, 2025 (the “Term”).

**2. Scope of Work and Data Sharing Agreement.**

District has agreed to be MDRC’s research partner in the Project in accordance with the roles and responsibilities set forth in the Scope of Work, attached hereto as Exhibit A and incorporated herein. District also has agreed to provide de-identified data according to the terms outlined in the Data Sharing Agreement, attached hereto as Exhibit B. District is responsible for providing complete and satisfactory performance of this Agreement, in accordance with the roles and responsibilities set forth in the Scope of Work and Data Sharing Agreement. The determination of satisfactory performance shall be made by MDRC, in its reasonable judgment, in consultation with District.

**3. Payment.**

To offset costs related to participation in the Project, District will receive fixed payments up to \$9,004 (nine thousand four dollars) according to the payment terms (“Compensation/Payment Terms”) incorporated in Exhibit A, Section IV.

**4. Personnel.**

- a. Key Personnel. The following individuals shall serve as the primary points of contact connection with the completion of the Scope of Work for the Project:

**At MDRC:**

Rachel Rosen  
Project Director  
Phone: (212) 340-4491  
Email: [rachel.rosen@mdrc.org](mailto:rachel.rosen@mdrc.org)

**At District:**

Gregory Cluster  
Work Based Learning Coordinator  
Phone: (510) 646-0574  
E-mail: [gregory.cluster@ousd.org](mailto:gregory.cluster@ousd.org)

- b. Unavailability of Key Personnel. District agrees to give MDRC reasonable notice whenever its Key Personnel may become unavailable.

**5. Prime Award Requirements.**

- a. MDRC is operating the Project under its Prime Award as described above, and MDRC intends for this Agreement to be executed in conformity with the applicable provisions of the Prime Award. MDRC is bound by these terms and requires District to be in compliance with the clauses and provisions that apply to District as a subrecipient under Education Department General Administrative Regulations (EDGAR); 2 CFR; 2 CFR Part 180, Nonprocurement Debarment and Suspension as adopted as 2 CFR Part 3485; 2 CFR Part 200 as adopted at 2 CFR 3474; 2 CFR 175; and 34 CFR Parts 75, 77, 79, 81, 82, 84, 85, 86, 97, 98, 99.
- b. MDRC is also required per 2 CFR 200 to provide certain information about its Prime Award, attached hereto and incorporated herein as Exhibit C – Prime Award Details.
- c. In the event of a conflict between this Agreement and the Prime Award terms related to District’s role as a subrecipient under this Project, the terms of the Prime Award take precedence.

**6. Publicity.**

District shall provide MDRC, via written notice, with advance notice and copies of any Project-related materials prepared for marketing, publicity, or presentation purposes. MDRC will review these materials and provide District with any comments and written approval to use the materials in a timely fashion.

**7. Program Information and Research Information/Rights in Data.**

a. Program Information.

i. Definition. MDRC considers all data and records within District’s custody that are collected and used in the ordinary course of business to be “Program Information.”

ii. Ownership. District shall retain ownership of all Program Information at all times and may use Program Information as it wishes.

b. Research Information. MDRC owns all Research Information, of which there are two types:

i. All data compiled or collected by MDRC and District specifically for the Project (i.e., information that is not collected and used in the ordinary course of business), including any documents, programming code, findings, and instruments, are Research Information, whether such data are in District’s custody or MDRC’s. MDRC owns all Research Information. Research Information also includes all IFS related research documents, programming code, findings, and instruments.

ii. MDRC considers that when District’s copies of Program Information are transferred to MDRC for research purposes, in accordance with this Agreement, those copies become Research Information and will be protected by MDRC as described below.

**8. Confidentiality.**

a. MDRC’s Confidentiality Pledge. MDRC shall keep all Research Information in the strictest confidence, only making it available to MDRC personnel and members of the research team (MDRC and EurekaFacts, or “Research Team”) with a need to access it. MDRC will comply with all applicable confidentiality and privacy laws and rules, and shall cause its employees, consultants, and subcontractors and subcontractors’ employees and consultants to so comply. No personally identifiable data will be referred to in any report without the permission of the person involved. MDRC must comply with the requirements, if any, of MDRC’s Institutional Review Board (“IRB”) and submit to the IRB all materials required for continuing IRB oversight.

b. Confidentiality Pledge. District may not divulge or disseminate to any third party any Research Information that becomes known to it during performance of this Agreement and/or which is in its custody. District will keep all Research Information that contains personal identification information (e.g., contact information, Social Security Numbers), if any, confidential and secure until it is sent to MDRC. Use of or disclosure to any third party of any Research Information is a breach of the terms of this Agreement. If District has any reason to believe that there has been a breach of confidentiality of Research Information, whether through deliberate or inadvertent disclosure, District will make its best efforts to

notify MDRC within 24 hours of the discovery of the breach or possible breach. Upon completion of this Agreement, District will request and then comply with reasonable written instructions from MDRC regarding the disposition of any Research Information. Program Information is subject to the confidentiality and privacy laws and rules applicable to District. Anything in this Agreement to the contrary notwithstanding, when and to the extent that Project materials are made public by MDRC, District shall have the same rights as the general public to utilize any such materials, including the right to make fair use of copyrighted materials.

c. Survival of Confidentiality Provisions. The provisions in this Agreement regarding confidentiality will continue to bind both parties when the Agreement is completed or otherwise terminated.

## **9. Proprietary Information.**

a. Performance of this Agreement may require District to access and use data and information proprietary to MDRC (including its subcontractors) that is of such a nature that its dissemination or use, other than in performance of this Agreement, will be adverse to the interest to the MDRC (“Proprietary Information”). For illustrative purposes only, the Project protocols used for data collection or information about the study design approach or any training materials would be Proprietary Information. District understands that the Proprietary Information disclosed pursuant to this Agreement derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by, other persons who can obtain economic value from its disclosure or use.

b. Except as permitted under this Agreement, District agrees not to divulge, reproduce, or release Proprietary Information in any form to any third party, either during or after the term of this Agreement, until made public by MDRC. District shall not use, disclose, or reproduce Proprietary Information, other than as required in the performance of this Agreement. Nothing herein shall preclude the use of any data and information and independently acquired by District without such limitations.

c. District agrees that it will protect MDRC’s Proprietary Information in the same manner as it protects its own Proprietary Information of a similar nature. Disclosure of MDRC’s Proprietary Information within District’s organization shall be restricted to those individuals who are directly participating in performance under this Agreement.

d. The foregoing terms and conditions regarding Proprietary Information shall survive the termination of this Agreement and shall remain in effect for three (3) years thereafter.

## **10. Notice.**

All notices required or permitted to be given hereunder shall be sufficient if in writing and personally delivered; if sent by certified mail, return receipt requested, and postage prepaid; or if sent by national recognized courier, signature delivery required, addressed as follows:

**If to MDRC:**

Jesús M. Amadeo  
Senior Vice President  
200 Vesey Street  
New York, NY 10281  
Email: [Jesus.Amadeo@mdrc.org](mailto:Jesus.Amadeo@mdrc.org)

**If to District:**

Rebecca Lacoque  
Linked Learning Director  
1000 Broadway, Floor 4  
Oakland, California 94607-4099  
E-mail: [rebecca.lacocque@ousd.org](mailto:rebecca.lacocque@ousd.org)

**11. Insurance.**

During the Term, MDRC and District shall maintain all appropriate insurance for its organization and its insurance policies shall be placed with suitably-licensed carriers with appropriate ratings.

**12. Equal Opportunity/Non-Discrimination.**

Each party shall comply with all applicable federal, state, and local civil rights and non-discrimination laws, rules, and executive orders.

**13. Liability.**

District shall have no financial obligations under this Agreement other than as provided in this Agreement. Notwithstanding any other provision of this Agreement, in no event shall District be liable, regardless of whether any claim is based on contract or tort, for any special, consequential, indirect or incidental damages, including, but not limited to, lost profits or revenue, arising out of, or in connection with, this Agreement for the Services performed in connection with this Agreement.

To the furthest extent permitted by California law, MDRC shall indemnify, defend and hold harmless District, its Governing Board, agents, representatives, officers, consultants, employees, trustees, and volunteers (“District Indemnified Parties”) from any and all claims or losses accruing or resulting from injury, damage, or death of any person or entity arising

out of MDRC's performance of this Agreement. MDRC also agrees to hold harmless, indemnify, and defend District Indemnified Parties from any and all claims or losses incurred by any supplier, vendor, or subcontractor furnishing work, services, or materials to MDRC arising out of the performance of this Agreement. MDRC shall, to the fullest extent permitted by California law, defend District Indemnified Parties at MDRC's own expense, including attorneys' fees and costs, and District shall have the right to accept or reject any legal representation that MDRC proposes to defend District Indemnified Parties.

To the furthest extent permitted by California law, District shall indemnify, defend, and hold harmless MDRC, its Board, agents, representatives, officers, consultants, employees, trustees, and volunteers ("MDRC Indemnified Parties") from any and all claims or losses accruing or resulting from injury, damage, or death of any person or entity arising out of District's performance of this Agreement. District shall, to the fullest extent permitted by California law, defend MDRC Indemnified Parties at District's own expense, including attorneys' fees and costs, and MDRC shall have the right to accept or reject representation that District proposes to defend MDRC Indemnified Parties.

**14. Changes.**

This Agreement may be altered, amended, or modified only by a writing executed by duly authorized representatives of both parties. However, MDRC may at any time, by written order, make changes in the services to be performed by District, within the general scope of this Agreement. Such changes include those that would reasonably follow from the COVID-19 pandemic, as determined by MDRC in its sole discretion.

**15. Termination.**

MDRC is expecting to enjoy a mutually beneficial relationship with District during the Project. Both parties are committing to involvement for the entire period. If, however, circumstances make either party's continued participation in the Project infeasible, that party will provide the other with immediate written notice and the opportunity to try to resolve the matter. After such an opportunity, either party can terminate the Agreement. Termination proceedings may include a period of phasing out work or the renegotiation or cancellation of pending payments.

**16. Reduction in Funding.**

MDRC has the right, in its sole discretion, to make a corresponding adjustment to the compensation amount described above upon any revisions MDRC makes to the Scope of Work under this Agreement. District and MDRC will proceed with performance under this Agreement, as revised. If MDRC's funding is delayed or interrupted for any reason, MDRC shall have the right, in its sole discretion, to impose a corresponding reasonable delay of payments to District.

**17. Stop Work.**

A Stop Work Order will be issued by MDRC to District if it is advisable in MDRC's sole discretion to suspend work. By written Stop Work Order to District, MDRC will require District to stop all, or any part, of the work called for by this Agreement. Upon receipt of the Stop Work Order, District will immediately comply with its terms and take all reasonable steps to minimize the incurrence of costs allowable to the work covered by the Stop Work Order.

**18. Final Agreement.**

The Agreement and all attachments constitute the complete and final agreement between MDRC and District, and supersedes all prior agreements, written or oral, relating to the subject matter hereof. The invalidity or unenforceability of any particular provision of this Agreement shall not affect any of the other provisions, and this Agreement shall be construed in all respects as if such invalid or unenforceable provisions were omitted. Titles of sections are for convenience only, and neither limit nor amplify the provisions of the Agreement itself.

We look forward to working with you. Thank you, and please sign below to signal your agreement.

Approved as to form by OUSD Staff Attorney  
Joanna Powell on 7/13/22. 

**Acknowledged and Agreed to:**



## Exhibit A – Scope of Work

### I. Background

The following document describes work to be undertaken by MDRC and Oakland Unified School District (the “District”) for the CTE Advise study. The purpose of this study is to build evidence about the impacts of technology-based career advising tools. The study includes an in-depth, multi-year examination of program implementation in high schools from multiple districts across the country, an investigation of related program costs, and an assessment of the effects of CTE advising tools on students’ self-awareness and understanding of suitable career pathways, their CTE course taking patterns, and their engagement with school and progress toward graduation.

The study will use a school-level random assignment research design to evaluate the impact of the program on students’ outcomes. The evaluation will assess three main components: impacts on academic outcomes and student self-awareness related to career aptitudes and interests and knowledge of career options and career pathways, implementation (e.g., fidelity, program exposure, contrast and context), and cost effectiveness. The study is designed to answer the following research questions:

- 1. Implementation:** To what extent are technology-based career advising tools—including training and support related to using and administering the tool-- implemented as designed? What is the context in which technology-based career advising tools are being implemented?
- 2. Impact:** Do the tools have an effect on student’s persistence in CTE course taking? Do the tools have effects on student self-awareness related to career aptitudes and interests, and knowledge of career options and career pathways? Do the tools have effects on student engagement with school and progression toward graduation? Do the effects of the programs vary by the following factors: student gender, initial career interest, type of advising tool a school is assigned to, number of different career pathways a school provides to its students.
- 3. Cost:** What is the cost of technology-based career advising tools model and their cost-effectiveness?

The study will begin in fall 2022 and continue through summer 2026.

### Definitions of Key Stakeholders

**The District:** The school district (and relevant contacts therein) where the study schools are located.

**The Study Team:** The researchers at MDRC working on the CTE Advise study. Your main contacts for any questions or concerns you may have are:

- Rachel Rosen, Principal Investigator. [Rachel.Rosen@mdrc.org](mailto:Rachel.Rosen@mdrc.org)
- Ivonne Garcia, Co-Principal Investigator. [Ivonne.Garcia@mdrc.org](mailto:Ivonne.Garcia@mdrc.org)

**Program Group/schools:** Schools randomly assigned to receive two years of free access to YouScience or Xello software packages, training, and support.

**Control Group/schools:** Schools randomly assigned to continue “business as usual” for two and a half years. Schools in this group cannot use YouScience, Xello, or a comparable tool during this time frame.

**District Coordinator:** The district coordinator will work with the relevant personnel at the district and the study schools to assist the study team in collecting school-level and district-level data.

**Data Collection School Liaison:** A designated person in each study school that facilitates completion of data collection for the CTE Advise study in their school. This includes assisting the study team in collecting parent consent, promoting completion of surveys, and selecting potential participants for interviews and focus groups.

## II. Roles and Responsibilities of the District and Participating Schools

By participating in the CTE Advise Study, the District and participating schools agree to the following:

1. **Securing district research approval.** The District will assist the Study Team in securing research approval for the study and informed consent for data collection, as applicable and as needed.
2. **Identifying participating school(s).** The District will identify 6 schools within the district that meet the study’s criteria for participating schools. Participating schools, at a minimum:
  - Have at least 2 CTE pathways available for students to choose from, and;
  - Are not currently using YouScience, Xello, or a comparable tool.
3. **Adhering to group assignments.** MDRC will randomly assign participating schools to one of three groups.
  - Program Group A: receives free access to YouScience tools, training, and support for SY22-23. Schools assigned to this group will implement YouScience with the student cohort that is in 9<sup>th</sup> grade during SY22-23, for purpose of the study.
  - Program Group B: receives free access to Xello tools, training, and support for SY22-23. Schools assigned to this group will implement Xello with the student cohort that is in the 9<sup>th</sup> grade during SY22-23, for the purposes of study.
  - The Control Group: Schools assigned to a Control Group are expected to refrain from using Xello, YouScience, or a comparable tool for one and a half school years, after which they will receive an additional stipend with which they can purchase a resource of their choosing.

*3A. Control schools group expectations:* Schools assigned to the Control Group agree to not implement a career advising tool similar to YouScience and Xello for one and a half

years after the project start (through January 2024).<sup>1</sup> In order to understand the impact of these tools, it is vital that the differences in services created by the random assignment of schools to the Program and Control Groups are maintained during the one and a half year waiting period. The District and MDRC both will communicate these expectations to the schools in the district. Additionally, the District agrees to discourage the use of comparable tools by Control schools during the two and a half year waiting period.

*3B. Program Group expectations:* Schools assigned to the two Program Groups will be expected to implement the career advising tool they are assigned (Xello or YouScience). Schools can implement the tools according to their school's environment and specific circumstances. At a minimum, schools are expected to assist students in navigating the tool, and in interpreting their results. School staff responsible for assisting students will receive the upfront training and ongoing support needed to perform this role for students. The District and MDRC both will communicate these expectations to the schools in the district.

4. **Assistance with data collection.** A few select school staff and faculty, as well as a cohort of students in all participating schools will be asked to participate in the following surveys and interviews. These will take place at various points in time between fall 2022 and spring 2025. The District and participating schools agree to aid the Study Team in implementing the following data collection plan, including:

*4A. District Administrative Records*

- The District will share with the Study Team: administrative, anonymized student-level data on student characteristics, transcript data, and indicators of progress toward graduation for study participants in participating schools (Program and Control) for school years 2022-23 through 2024-25. The following variables at the student-level will be requested:
  - Socio-demographic variables: Gender, race/ethnicity, grade, and reduced/free lunch status
  - Student records: Mobility, attendance, retention, ELL status, IEP status, and special education placement category
  - Transcript data: Course selection, credit accumulation, and indicators of progress towards graduation.
- Student-level course transcript data and administrative records will be requested the following school years: SY 2022-23; SY 2023-24; 2024-2025. Additionally, students' baseline state standardized test scores in reading and math will also be collected to measure baseline academic performance and assess baseline equivalence among Program conditions, and they will be used as covariate variables in the analysis, and to define subgroups. The Study Team will request standardized test scores from 8th

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<sup>1</sup> MDRC requests that purchases made in Spring 2024 be focused on incoming freshman for the 2024-25 school year, to avoid overlap with study participants.

(SY 21-22) grade for the 9th grade cohort. To protect student privacy and confidentiality, MDRC will ask districts to remove all personal identifiable information from the datasets and assign each student in the data file a unique random-generated research ID. Accordingly, MDRC will request that districts retain a crosswalk that links the research IDs to SIS number identifiers and other personal identifiable information (PII). Districts will use the crosswalk to assign students the same research ID in all data requests. With guidance from the Study Team, the District will link student-level course transcript data and administrative records to back-end usage data from the two software tools, which will be necessary to conduct the study. The research ID will additionally enable the Study Team to link data from multiple sources. Exact procedures will be worked out by the Study Team and district data staff.

- With guidance from the Study Team, the District will link student-level course transcript data and administrative records to back-end usage data from the two software tools, which will be necessary to conduct the study. Specifically, these data will provide the Study Team and the District with insights related to how long students spend using the tools.
- For more information related to the administrative data the Study Team plans to collect, please see the Data sharing agreement in Exhibit B.

*4B. School Surveys - Administered twice between 2022-23 through 2023-24 school years.*

- School staff survey: The study team will administer a brief online survey to school staff involved with helping students make pathway and career decisions in Program and Control schools.
- Student survey: A brief online survey will be administered to all students in the study (the cohort of students who are 9<sup>th</sup> graders in SY 2022-23) at two points in time, regardless of whether they are students in a Program or a Control school. The surveys will ask questions to assess broad career knowledge, self-awareness, and interests.
- *Note*: All surveys are completely voluntary. Schools will receive an additional stipend as an acknowledgement of this effort.

*4C. School Site Visits – Conducted spring 2023.*

- The Study Team will conduct site visits to a small subset of Program and Control schools. The Study Team will select schools for site visits, and some districts may never be part of a site visit. During visits, the Study Team will conduct interviews with principals, key/relevant school staff, and a small group of students to learn about implementation of the advising tools and differences between Program and Control schools.
- *Note*: All interviews are completely voluntary and will be scheduled to not interfere with instructional time.

**Study Activity Schedule SY 22-23 ONLY**

	2021	2022			2023			2024			2025		
	Fall	Spring	Summer	Fall									
Collect student records & advising tool data									X			X	
Online surveys <i>(B=student baseline; F=student follow-up; S = staff)</i>				B	S			F					
<i>[Selected schools only] Study team visits school</i>					X								

5. **Administrative support for data collection.** The Study Team will work with the District Coordinator(s) and School Liaisons in each school. The District Coordinator(s) and Data Collection School Liaisons will assist the Study Team with data collection by gathering rosters of students, parents, and school informants for the completion of consent forms and surveys, supporting completion of surveys, and helping to schedule data collection activities, including setting up site visits by the Study Team. MDRC will provide participating schools with additional resources to support data collection efforts, which they may use toward supporting the liaison efforts. Details on the compensation for this support are provided below.

6. **Data Privacy and Security Guidelines.** Participating districts will adhere to the following:

- **Analysis and dissemination:** The District will consult with MDRC before analyzing any data from the study sample and/or disseminating or posting information about findings from the study, as outlined in the Agreement.
- **Data security, management, and transfer:** All paper documents containing individually identifiable student data should be stored in locked areas, to which only a limited number of staff have access. Computerized research data should be kept in password-protected files. The District will follow specific instructions from MDRC when transferring any student data. Data will be shared in accordance with the Data Agreement (see Exhibit B).

### III. Roles and Responsibilities of MDRC under its agreement with the U.S. Department of Education

1. **IRB.** MDRC will prepare required materials and receive any necessary approvals from MDRC’s Institutional Review Board (IRB). MDRC will provide the District with letters of approval as they are received. MDRC will also work with the District’s research team, as applicable, to obtain any necessary approvals.
2. **Oversee communications across participating districts and MDRC’s partners.** The District will maintain independent relationships with the advising tool companies they are partnered with to ensure smooth rollout and implementation of the software. As noted above, YouScience and Xello will provide schools assigned to receive them with ongoing customer support as needed. For questions related to the study or the advising tool

companies, districts can reach out to the principal investigator, Rachel Rosen, via email at [Rachel.rosen@mdrc.org](mailto:Rachel.rosen@mdrc.org).

### 3. Data collection and analysis:

- a. *Impact study*: For the impact study, MDRC will collect individual-level data for all students in the study, as detailed in the district's responsibilities listed above. MDRC will administer a student survey to all students in the sample. The survey data will be linked to student-level data collected from the district to assess outcomes as they relate to student demographics and their time spent using the tools.
- b. *Implementation study*: The student survey will also feature questions that will inform the study team about the implementation of the tools and the service contrast in schools receiving access to the tools versus those operating under business-as-usual conditions. The MDRC team will also be responsible for administering a survey to select school staff, and conducting site visits to interview principals, school staff, and students for the implementation study. Finally, MDRC will collect student usage data from the advising tool companies, YouScience and Xello, to understand the amount of time both students and associated staff spend using the tools.
- c. *Cost study*: The study team will analyze cost data based on budget and price documents collected the advising tool companies to assess the tools' cost-effectiveness. MDRC will also collect publicly available sources of school expenditure including several of the school finance datasets maintained by NCES. Data about prices that cannot be found through these data sources, as well as other relevant data needed to define ingredients, such as amount of staff and student time spent on activities related to the implementation and use of the technology tools, will be gathered through the implementation surveys of students and school informants, as well as through interviews.
- d. For all surveys administered to students, MRDC shall be responsible for compliance with 34 C.F.R. Part 98, California Education Code section 51513, and California Education Code section 51938, to the extent applicable.

### Proposed Timeline of Activities

- In summer 2022, (pending completion of this agreement) MDRC will randomly assign schools in the district that are participating in the study to one of three groups. Schools randomly assigned to the two Program Groups will receive free access to a technology-based career advising tool, and schools randomly assigned to the Control Group will continue with existing practices.
- In spring/summer 2022, MDRC will provide instruction to school staff on how to describe the study to parents/guardians and how to respond to questions about participating. MDRC will also provide staff with written support materials about the study (e.g., frequently asked questions or FAQs).

- In spring/summer 2022, staff in schools assigned to a Program Group will receive training from career-advising technology companies.
- In fall 2022, MDRC will administer a brief, online baseline survey to ninth-grade students in participating schools. MDRC will administer follow-up surveys to winter 2023/spring 2024.
- In spring 2023, MDRC will conduct principal, school informant, and student interviews in a subset of study schools; MDRC will also administer a survey to school informants in all study schools.
- In summer 2024 and 2025, MDRC will collect student-level administrative records from districts.
- MDRC will publish a final study report in 2026.

#### IV. Compensation/Payment Terms

##### 1. Payment for District Milestones.

- To offset costs related to this Scope of Work, the District will receive a fixed payment of \$2,000 (two thousand dollars) for its completion of milestones (“District Milestones”) in accordance with the schedule outlined below.

Payment No.	Milestone	Amount
1	Fall 2024 Data Submission	\$1,000
2	Fall 2025 Data Submission	\$1,000

- The District Milestones will be paid within thirty (30) days of the submission of the milestones outlined in the table in section (a) above.
- ##### 2. Payments for Participating Schools.
- The District will receive a fixed amount for each school that participates, as follows:
- Program Group payment amount.* \$1,333.34 per participating school in the district assigned to the Program Group (the group that will receive to free access to the career advising tools for SY 2021-22).
  - Control Group payment amount.* \$2,183.34 per participating school in the district assigned to the Control Group.
  - Payment Schedule for Participating Schools.* The District agrees to pay each participating school according to the schedule below:

Milestone	Amount
School joins study	\$500

Year 1 surveys (fall 2022/spring 2023). Stipend will be intended for Data Collection Liaison at school after spring 2023 survey fielding.	\$416.67
Year 2 surveys (spring 2024). Stipend will be intender for Data Collection Liaison at school after spring 2024 survey fielding.	\$416.67
<b>Control schools only</b> - End of waiting period (expected Jan 2024)	\$850
<b>TOTAL</b>	P: \$1,333.34 C: \$2,183.34

d. *Request for Payment.* To request these funds, District shall submit an invoice to [APinvoices@mdrc.org](mailto:APinvoices@mdrc.org) and [Hannah.Power@mdrc.org](mailto:Hannah.Power@mdrc.org). The subject line of the email should include the District name, Project name, and Payment Request Date. The invoice must include the following:

- i. Name and address of Organization;
- ii. MDRC project name, agreement number and District’s Federal Employee ID number (FEIN);
- iii. Invoice date;
- iv. number of Program Group participants and requested payment amount;
- v. number of Control Group participants and requested payment amount;
- vi. Name, address, and telephone number of contact to whom payment by check should be sent;
- vi. signature of an authorized official;
- vii. Any other information or documentation requested by MDRC to make the payment.

END OF EXHIBIT A

## **Exhibit B: Data Sharing Agreement**

MDRC is conducting a research study (the “Study”) to evaluate the effects of technology-based career advising tools on students. To assist with the Study, **the District** (the “Data Provider”) agrees to provide MDRC with data as specified in this Exhibit to be used exclusively for the purposes described herein. This Exhibit describes the data that the Data Provider will provide to MDRC, when and how frequently the Data Provider will provide it, how the Data Provider will securely transfer the data to MDRC, and how MDRC will keep the data secure and confidential once it has been received.

### **Data Provided to MDRC**

The Data Provider will share the following types of data with MDRC for the students in the 2021-22 and 2022-2023 ninth grade cohorts in schools participating in the Study. All student data shall be deidentified such that student identity cannot be discerned therefrom:

1. **Student Transcript Data**. The Data Provider will share information on the courses taken by students, as well as their credits earned, and grades received for SY 2021-22, 2022-23, 2023-24, 2024-25. This dataset will contain one row of data for each course taken by each student in each academic term covered in the study—each row of the dataset will contain the following fields:
  - a. Research ID
  - b. School Year
  - c. Student Grade Level
  - d. Academic Term
  - e. Course Title
  - f. Course Type
  - g. Course Number /Code
  - h. Course Level
  - i. Credits earned
  - j. Grade Received
  
2. **Baseline Data**: The Data Provider will share baseline standardized test data ELA and Math standardized test scores from either 6th (SY18-19), 7th (SY19-20), or 8th (SY 20-21) grade for the 9th grade cohort. The study team understands that COVID-19 school closures disrupted standardized testing in many districts. The study team will communicate with the Data Provider to understand what is the best data to request. The dataset will contain the following fields:
  - a. Research ID
  - b. School Year
  - c. Student Grade Level
  - d. Baseline year Reading Standardized Test Scale Score
  - e. Baseline year Math Standardized Test Scale Score
  - f. Baseline year Reading Standardized Test Proficiency Level
  - g. Baseline year Math Standardized Test Proficiency Level

- h. Baseline year Reading standardized test name
  - i. Baseline year Math Standardized Test Name
3. Enrollment and Demographic Data: The Data Provider will share enrollment and demographic data for SY 2021-22, 2022-23, 2023-24, 2024-25. This dataset will contain one row of data for each school attended by each student—each row of the dataset will contain the following fields:
- a. Research ID
  - b. School Year
  - c. School Name
  - d. Student Grade Level
  - e. School Name
  - f. School entry date
  - g. School exit date
  - h. Race/Ethnicity
  - i. Student gender
  - j. ELL Status
  - k. IEP Status
  - l. Free-/reduced-price lunch, (or comparable indicator of student economic status, where available, and in districts with community eligibility for free and subsidized meals)
  - m. Zip code
  - n. Number of days present or absent
4. Academic achievement and performance: The Data Provider will share academic achievement and performance data for SY 2021-22, 2022-23, 2023-24, 2024-25. This dataset will contain one row of data for each student and for each academic year covered in the study—each row of the dataset will contain the following fields:
- a. Research ID
  - b. School Year
  - c. Student Grade Level
  - d. Academic Term
  - e. Cumulative credits earned
  - f. Overall unweighted GPA
  - g. Overall weighted GPA
  - h. High school completion status

**Data Guidelines:**

- a. **Dissemination:** The District will consult with MDRC before publicly disseminating or posting information about findings from the project, as outlined in the Agreement.
- b. **IRB:** MDRC will prepare required materials and receive any necessary approvals from MDRC’s Institutional Review Board (IRB). MDRC will provide the District with letters of approval as they are received.

### **Protect confidentiality of participants**

- a. All audio files, transcripts, survey responses, and notes are stored on encrypted-at-rest and password-protected devices, and securely transferred and maintained on internal secure drives with access limited to designated members of the project team. Where possible and applicable, any data collected will be assigned research ID numbers that link to files containing PII.
- b. MDRC will, when necessary, transmit participants' personally identifiable information to and from our partners in a secure manner. MDRC uses Box to securely transfer PII with its partners.
- c. **Reporting:** All public reports, tables, and printed materials will be limited to presentation of aggregate numbers. No student-level personally identifiable information will be referred to in any report by MDRC.

### **Data File Structure and Format**

The Data Provider will send MDRC data files in an Excel format (either .xls or .xlsx).

**Data Documentation** The Data Provider will provide MDRC with all available and necessary documentation regarding the data files shared. Examples of documentation include course catalogs, data dictionaries, explanations of codes, and copies of survey instruments.

### **Data Transfer Procedures**

To ensure that data files are transferred securely, MDRC uses a secure file transfer site that is easy to use and does not require the Data Provider to make any purchase or install any software. MDRC will email instructions on setting up a secure account to data contacts at the Data Provider, enabling those contacts to log on to the site and upload data files as needed. To ensure that all data are transmitted in a confidential and secure manner, data contacts at the Data Provider will only transmit data to MDRC via MDRC's secure file transfer site. Data contacts at the Data Provider will not transmit any data to MDRC via email or any method other than MDRC's secure file transfer site nor provide any other unsolicited data of any kind.

### **MDRC Data Security**

MDRC follows internal data security and confidentiality protocols to secure and protect student data. MDRC keeps data files containing direct identifiers in a secure location on the internal MDRC network, where they will only be accessible to a small number of staff and accessed only for research purposes. Additionally, MDRC will strip direct identifiers from the data and assign a unique, randomly generated identification number to each participant. MDRC's analysis will proceed using these files, rather than the original files containing direct identifiers. This random ID assigned to each individual will also be used to link data for that individual across files that no longer include direct identifiers. For the Study, MDRC will ask the Data Provider to assign the randomly generated ID. MDRC will also assign one or more Data Managers to maintain custody of the records shared by the Data Provider and ensure that MDRC data security and confidentiality protocols are observed.

### **MDRC Data Destruction**

Within five years of the conclusion of the project, MDRC will destroy all data files received from the District that contain direct identifiers. MDRC will retain data files that do not contain direct identifiers to conduct additional analyses.

## Exhibit C – Prime Award Details

	<b>US Department of Education</b> <b>Washington, D.C. 20202</b>	R305A200307																				
GRANT AWARD NOTIFICATION																						
1	<b>RECIPIENT NAME</b>  MDRC K-12 Education 200 Vesey Street 23rd Floor New York, NY 10281 - 2103	2	<b>AWARD INFORMATION</b>  <table style="width: 100%; border: none;"> <tr> <td style="padding-right: 20px;">PR/AWARD NUMBER</td> <td>R305A200307</td> </tr> <tr> <td>ACTION NUMBER</td> <td>1</td> </tr> <tr> <td>ACTION TYPE</td> <td>New</td> </tr> <tr> <td>AWARD TYPE</td> <td>Discretionary (Research and Development)</td> </tr> </table>	PR/AWARD NUMBER	R305A200307	ACTION NUMBER	1	ACTION TYPE	New	AWARD TYPE	Discretionary (Research and Development)											
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ACTION NUMBER	1																					
ACTION TYPE	New																					
AWARD TYPE	Discretionary (Research and Development)																					
3	<b>PROJECT STAFF</b>  <b>RECIPIENT PROJECT DIRECTOR</b> Rachel Rosen (212) 340-4491 <a href="mailto:Rachel.Rosen@mdrc.org">Rachel.Rosen@mdrc.org</a> <b>EDUCATION PROGRAM CONTACT</b> Corinne Alfeld (202) 245-8203 <a href="mailto:corinne.alfeld@ed.gov">corinne.alfeld@ed.gov</a> <b>EDUCATION PAYMENT HOTLINE</b> G5 PAYEE HELPDESK 888-336-8930 <a href="mailto:edcaps.user@ed.gov">edcaps.user@ed.gov</a>	4	<b>PROJECT TITLE</b>  84.305A Choice and Information: The Impact of Technology-based Career Advising Tools on High School Students' CTE Choices and Academic Performance																			
5	<b>KEY PERSONNEL</b> <table style="width: 100%; border: none; margin-top: 10px;"> <thead> <tr> <th style="text-align: left; border-bottom: 1px solid black;">NAME</th> <th style="text-align: left; border-bottom: 1px solid black;">TITLE</th> <th style="text-align: left; border-bottom: 1px solid black;">LEVEL OF EFFORT</th> </tr> </thead> <tbody> <tr> <td>Rachel Rosen</td> <td>Project Director</td> <td>20 %</td> </tr> <tr> <td>Ivonne Garcia</td> <td>CO-PI</td> <td>16 %</td> </tr> <tr> <td>Crystal Byndloss</td> <td>Implementation Lead</td> <td>8 %</td> </tr> </tbody> </table>			NAME	TITLE	LEVEL OF EFFORT	Rachel Rosen	Project Director	20 %	Ivonne Garcia	CO-PI	16 %	Crystal Byndloss	Implementation Lead	8 %							
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7	<b>AUTHORIZED FUNDING</b>  <table style="width: 100%; border: none; margin-top: 10px;"> <tr> <td style="padding-right: 20px;">THIS ACTION</td> <td>\$836,906.00</td> </tr> <tr> <td>BUDGET PERIOD</td> <td>\$836,906.00</td> </tr> <tr> <td>PERFORMANCE PERIOD</td> <td>\$836,906.00</td> </tr> </table>			THIS ACTION	\$836,906.00	BUDGET PERIOD	\$836,906.00	PERFORMANCE PERIOD	\$836,906.00													
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<b>8</b>	<b>ADMINISTRATIVE INFORMATION</b>	
	DUNS/SSN	075258780
	REGULATIONS	CFR PART 74 EDGAR AS APPLICABLE
	ATTACHMENTS	2 CFR AS APPLICABLE 1 , 2 , 3 , 6 , 8 , 9 , 11 , 12 , 13 , 14 , B IES , E-3 , E1 , E2 , E4 , E5 , HS-2
<b>9</b>	<b>LEGISLATIVE AND FISCAL DATA</b>	
	AUTHORITY:	PL 107-279 1 EDUCATION SCIENCE REFORM ACT OF 2002
	PROGRAM TITLE:	EDUCATION RESEARCH

CFDA/SUBPROGRAM NO:		84.305A							
FUND CODE	FUNDING YEAR	AWARD YEAR	ORG. CODE	CATEGORY	LIMITATION	ACTIVITY	CFDA	OBJECT CLASS	AMOUNT
1100M	2020	2020	ER000000	B	RTE	000	305	4101J	\$836,906.00



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## Statement of Research Approval

**Title of Research Project** CTE Advise: Advising Tools in Secondary Education  
**Researcher** Rachel Rosen  
**Institution/Organization** MDRC  
**Date** November 30, 2021  
**Research ID** 211025

To OUSD Principals and Leaders,

The proposed research has been approved by the OUSD Research Review Committee. The proposed research has been determined to be in compliance with existing legal and ethical research guidelines. The researcher has agreed that the study will not differ significantly from the activities described within the proposal that was submitted to the Research Review Committee. The researcher has stipulated that all participation will be voluntary, and it is understood that **approval of the proposal will not obligate any person, school, or department in OUSD to participate**. The researcher ensures that all student or staff data provided by the district will not be shared with other researchers or organizations. The researcher is obligated to submit any amendments to the original proposal to the Research Review Committee for approval before further research is permitted. The researcher agreed to provide the Office of Research & Assessment and each participating school with a copy of the research findings.

I am available to assist you with any questions regarding the research after you have discussed it with the researcher. Please call/email me if you have any questions about the research before or after it has been conducted.

Sincerely,

Kaia Vilberg  
Statistician  
Research, Assessment & Data  
Kaia.Vilberg@ousd.org