

MEMORANDUM OF UNDERSTANDING (“MOU”) BETWEEN THE COUNTY OF SAN MATEO (“COUNTY”), SAN MATEO COUNTY OFFICE OF EDUCATION (“COE”) AND SILICON VALLEY COMMUNITY FOUNDATION (“SVCF”) IN SUPPORT AND IN FURTHERANCE OF “THE BIG LIFT™” INITIATIVE

WHEREAS, in 2012, the Peninsula Partnership Leadership Council (PPLC) – a coalition of government, education, nonprofit, foundation and business leaders in San Mateo County – launched The Big Lift™ to significantly improve children’s third grade reading proficiency through strategic, thoughtful, evidence-based investments in early learning and education, and

WHEREAS it is recognized that third grade reading proficiency is essential in promoting the life-long learning skills needed to create productive residents and a prosperous community, as third grade is the year when students make the leap from learning to read to reading to learn, and

WHEREAS, the goal of The Big Lift is to increase the percentage of students in San Mateo County who are reading at grade level by the end of third grade to 80% by 2020, and

WHEREAS, The Big Lift has been implemented in seven San Mateo County communities in which third grade reading proficiency scores were close to or below the County average based on 2012-2013 school year data; those seven communities are Cabrillo, Jefferson Elementary, La Honda-Pescadero, Ravenswood, Redwood City, San Bruno Park, and South San Francisco, and

WHEREAS, to achieve this goal, The Big Lift has committed to advancing the national Campaign for Grade-Level Reading framework, which specifies the following evidence-based interventions, or “four pillars”:

1. A comprehensive school readiness strategy focused on high-quality preschool for 3 and 4 year-olds, leading to an aligned and sequenced set of high-quality learning experiences in kindergarten through third grade;
2. A focus on reducing chronic absences in the early grades, based on research about the importance of attendance in the early years to improving academic outcomes;
3. Inspiring summer learning opportunities that enable children to maintain their academic and developmental gains from high-quality preschool throughout the early grades; and
4. Strengthening family and community engagement through investments in strategies that support children’s learning in school, out of school and at home, and

WHEREAS, The Big Lift is a collective impact collaborative led by three agencies – Silicon Valley Community Foundation (SVCF), the San Mateo County Office of Education (COE) and the County of San Mateo (the County) in which school districts partner with preschool programs and community-based agencies to work toward the long-term goal of third grade reading success through the four pillars of The Big Lift, and

WHEREAS, since 2016, the San Mateo County Libraries (SMCL) and Building Educated Leaders for Life (BELL) have subcontracted with The Big Lift to operate The Big Lift Inspiring Summers program across the seven school districts in collaboration with school staff and community partners to curb learning loss in the summers between entering Kindergarten and third grade, and

WHEREAS, the data collected by school districts and COE and analyzed by the RAND Corporation shows that children participating in The Big Lift preschools are entering more Kindergarten-ready than demographically similar peers with no preschool; and data collected by BELL shows that children participating in The Big Lift Inspiring Summers enter school with an average one-and-a-half-months reading gain, and

WHEREAS, the County, COE and SVCF agree that the County has previously appropriated \$20 million in FY 2013-19 in Measure A/K funds to support The Big Lift, and prospectively the County has allocated an additional \$7.9 million for FY 2019-20 and \$8 million FY 2020-21 for a total of \$15.9 million to continue to support The Big Lift, and

WHEREAS, the County, COE and SVCF have developed a detailed budget for The Big Lift for the FYs 2019-20 and 2020-21 as set forth in Exhibit A, and the County will reimburse COE and SVCF for certain agreed-upon "direct costs" and "indirect costs" as defined in Exhibit B, and

WHEREAS, costs associated with The Big Lift incurred by San Mateo County Libraries (SMCL) will be budgeted by the County. The County will directly pay SMCL from the County's funds appropriated to support The Big Lift as set forth in the detailed budget attached hereto as Exhibit A while SVCF will continue to oversee school district contracts and provide oversight of the school districts, and

WHEREAS, in the interest of increasing outcomes for children and families in The Big Lift, each agency shall compile data necessary to track outcomes, maximize funding and provide needed services,

NOW, THEREFORE, in consideration of the foregoing and the terms, covenants and conditions herein contained, County, COE and SVCF agree as follows:

1. COUNTY OF SAN MATEO'S PROMISES AND RESPONSIBILITIES:

- a. Communicate, notify and share information collaboratively with SVCF and the COE, and acknowledge the three agencies' support, on all events related to The Big Lift;
- b. The County, SVCF and COE appointed leaders agree to meet once a month to review Big Lift updates and provide strategic direction for The Big Lift;
- c. Dedicate funds appropriated from Measure K to continue to support The Big Lift in FY 2019-20 and FY 2020-21;
- d. Help identify new long-term public and private investment to sustain Big Lift programs and services and cooperate in and support fundraising efforts for The Big Lift;
- e. Work with SVCF and COE to develop the mid-year updates to the detailed budget attached as Exhibit A;
- f. Analyze invoices and reimburse SVCF and COE for agreed-upon "direct costs" and "indirect costs" as defined in Exhibit B;
- g. Provide funding to SMCL directly for costs incurred associated with The Big Lift Inspiring Summers program; funds to be deducted from the County's appropriated funds for The Big Lift based on the SMCL budget approved by the County;
- h. Analyze data to determine the success of the efforts undertaken in support of The Big Lift; and
- i. Work directly with COE to share data related to outcomes, funding streams and service needs.

2. COUNTY OFFICE OF EDUCATION'S PROMISES AND RESPONSIBILITIES:

- a. Communicate, notify and share information collaboratively with the County and SVCF, and acknowledge the three agencies' support on all events related to The Big Lift;
- b. The County, SVCF and COE appointed leaders agree to meet once a month to review Big Lift updates and provide strategic direction for The Big Lift;
- c. Help identify new long-term public and private investment to sustain Big Lift programs and services, and cooperate in and support fundraising efforts for The Big Lift;
- d. Work with SVCF and the County to develop the mid-year updates to the detailed budget attached as Exhibit A;
- e. Administer preschool quality assessments, data collection and analysis, oversight of student data and sharing, coaching, and professional development and technical assistance services from this program to those selected school districts and preschools within San Mateo County;
- f. Prepare and submit invoices to SVCF to be transmitted to the County for reimbursement of agreed-upon "direct costs" and "indirect costs" as defined in Exhibit B; and
- g. Maintain records for program review, evaluation, audit and/or other purposes and make those records immediately available to the County upon request.

3. SILICON VALLEY COMMUNITY FOUNDATION'S PROMISES AND RESPONSIBILITIES:

- a. Communicate, notify and share information collaboratively with the County and the COE, and acknowledge the three agencies' support, on all events related to The Big Lift;
- b. The County, SVCF and COE appointed leaders agree to meet once a month to review Big Lift updates, provide strategic direction for The Big Lift;
- c. Work with the County and COE to develop the mid-year updates to the detailed budget attached as Exhibit A;
- d. Provide administrative and fiscal leadership on grants and expenditure of County funds to meet all funding and reporting requirements;
- e. Prepare and submit invoices to the County for reimbursement of agreed-upon "direct costs" and "indirect costs" as defined in Exhibit B ;
- f. Help identify new long-term public and private investment to sustain Big Lift programs and services, and cooperate in and support fundraising efforts for The Big Lift;
- g. By December 31st of each fiscal year (i.e., December 31, 2019, and December 31, 2020), provide a proposed detailed budget update and fiscal year to date expenditure information to the COE and the County regarding the implementation of Big Lift program activities, funds raised, and fiscal status of initiative;
- h. In addition, provide the following updates:
 - i. Quarterly reimbursement requests (due end of October, January, April, July)
 - ii. Semi-annual implementation reports on Year 5 (FY 19/20) and Year 6 (FY 20/21) of implementation
 1. Progress reports due June 2020 and 2021
 2. Final reports due December 2020 and 2021
- i. Provide program outcome data performed by external evaluation as described in Exhibit C.

4. TERM.

The initial term of the MOU shall be from July 1, 2019, through and including June 30, 2021.

5. RIGHT OF TERMINATION.

The County and/or the COE and/or SCVF may terminate this MOU with or without cause effective as of thirty (30) days upon written notice to the other parties. In the event of early termination of this MOU by the County, the Parties will take all reasonable and necessary steps to cease the programming, services, and assessments funded pursuant to this MOU. The County will reimburse acceptable costs and expenses consistent with the adopted budget incurred prior to the effective date of any early termination of the MOU.

6. HOLD HARMLESS.

The County shall defend, hold harmless and indemnify the COE, its officers, agents and/or employees and SCVF, its officers, agents and/or employees from any and all claims for injuries to persons and/or damage to property, which arise out of the terms and conditions of this MOU and which result from the negligent acts or omissions of County, its officers, agents, and/or employees.

The COE shall defend, hold harmless and indemnify County, its officers, agents and/or employees and SVCF, its officers, agents and/or employees from any and all claims for injuries to persons and/or damage to property, which arise out of the terms and conditions of this MOU and which result from the negligent acts or omissions of COE, its officers, agents, and/or employees.

SCVF shall defend, hold harmless and indemnify County, its officers, agents and/or employees and COE, its officers, agents and/or employees from any and all claims for injuries to persons and/or damage to property, which arise out of the terms and conditions of this MOU and which result from the negligent acts or omissions of SVCF, its officers, agents, and/or employees.

In the event of concurrent negligence of any parties to this MOU or their officers, agents and/or employees, then the liability for any and all claims for injuries or damages which arise out of the terms and conditions of this MOU shall be apportioned under California's theory of comparative negligence as presently established or may be hereafter modified.

7. INDEPENDENT CONTRACTOR.

All parties in the performance of this agreement are acting as employees or agents of the State of California, the County of San Mateo, the County Office of Education or Silicon Valley Community Foundation. All parties agree and understand that they do not acquire any of the rights, privileges, powers, or advantages of employees of any other party to this Agreement.

8. INSURANCE.

All parties shall maintain sufficient insurance, self-insurance or a combination thereof to comply with the following requirements, and, if requested, each party shall furnish the other party with certificates of insurance evidencing the required coverage. Thirty (30) days' notice must be given, in writing, to County of any pending change in the limits of liability or of any cancellation or modification of the policy.

Worker's Compensation and Employer's Liability Insurance. All parties shall have in effect during the entire life of this Agreement Worker's Compensation and Employer's Liability Insurance, or an acceptable program of self-insurance providing full statutory coverage. In signing this Agreement, parties certify, as required by Section 1861 of the California

Labor Code, that they are aware of the provisions of Section 3700 of the California Labor Code which requires every employer to be insured against liability for Worker's Compensation or to undertake self-insurance in accordance with the provisions of the Code, and parties will comply with such provisions before commencing the performance of the work of this Agreement.

Liability Insurance. All parties shall take out and maintain during the life of this MOU such Bodily Injury Liability and Property Damage Liability Insurance for services covered work covered by this MOU from any and all claims for damages for bodily injury, including accidental death, as well as any and all claims for property damage which may arise from each parties' operations under this MOU, whether such operations be by himself/herself or by any sub-contractor or by anyone directly or indirectly employed by either of them. Such insurance shall be combined single limit bodily injury and property damage for each occurrence and shall be not less than the amount specified below.

Such insurance shall include:

Comprehensive General Liability	\$5,000,000
Motor Vehicle Liability Insurance	\$5,000,000

9. NON-DISCRIMINATION AND OTHER REQUIREMENTS.

Section 504. All parties shall comply with § 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act of 1990, as amended, which provide that no otherwise qualified handicapped individual shall, solely by reason of a disability, be excluded from the participation in, be denied the benefits of, or be subjected to discrimination in the performance of this MOU, and that reasonable and legally-specified accommodations will be made to serve individuals with disabilities.

General Non-discrimination. No person shall, on the grounds of race, color, religion, ancestry, gender, age (over 40), national origin, medical condition (cancer), physical or mental disability, sexual orientation, pregnancy, childbirth or related medical condition, marital status, or political affiliation be denied any benefits or subject to discrimination under this MOU.

Equal Employment Opportunity. All parties shall ensure equal employment opportunity based on objective standards of recruitment, classification, selection, promotion, compensation, performance evaluation, and management relations for all employees under this MOU. All parties' equal employment policies shall be made available to either party upon request.

Violation of Non-discrimination Provisions. Violation of the non-discrimination provisions of this Agreement shall be considered a breach of this Agreement and may result in termination of this MOU, and /or legal action to recover any Court imposed damages incurred as a result of said violation(s). To effectuate the provisions of this section, the County Manager and Superintendent and SCVF may request authorization to examine employment records relating to this MOU, as the case may be with respect to compliance with this paragraph, and all parties shall not unduly withhold authorization.

Compliance with Equal Benefits Ordinance. With respect to the provision of employee benefits, Superintendent and SCVF shall comply with the County Ordinance which prohibits contractors

from discriminating in the provision of employee benefits between an employee with a domestic partner and an employee with a spouse.

Other Statutory Compliance. All parties shall comply fully with the nondiscrimination requirements required by 41 CFR 60-741.5 (a), which is incorporated herein as if fully, set forth. All services to be performed pursuant to this MOU shall be performed in accordance with all applicable Federal, State, County, and municipal laws, including, but not limited to, Health Insurance Portability and Accountability Act of 1996 (HIPAA) and all Federal regulations promulgated thereunder, as amended.

Compliance with Employee Jury Service Ordinance. All parties shall comply with the County Ordinance with respect to provision of jury duty pay to employees and have and adhere to a written policy that provides that its employees shall receive from their employer, on an annual basis, no less than five days of regular pay for actual jury service in San Mateo County. The policy may provide that employees deposit any fees received for such jury service with their respective employer or their employer may deduct from the employees regular pay the fees received for jury service.

10. CONFIDENTIALITY AND RETENTION OF RECORDS.

All parties agree to provide to each other, to any federal or state department having monitoring or reviewing authority, to each party's authorized representatives and/or their appropriate audit agencies upon reasonable notice, access to and the right to examine and audit records and documents necessary to determine compliance with relevant federal, state, and local statutes, rules and regulations, and this MOU, and to evaluate the quality, appropriateness and timeliness of services performed.

All parties shall maintain and preserve all financial records relating to this MOU for a period of seven (7) years from the termination date of this MOU, or until audit findings are resolved, whichever is greater.

All data collected on children participating in The Big Lift shall be kept confidential, as set forth in other agreements relating to The Big Lift. Key Stakeholders in The Big Lift shall comply with all applicable legal requirements with respect to the use and security of such confidential information, and shall protect such confidential information by using the same degree of care, but not less than a reasonable degree of care, to prevent the unauthorized access to or use, dissemination, or disclosure of confidential information as it uses to protect its own confidential information.

11. MERGER CLAUSE.

This MOU constitutes the sole MOU of the parties hereto and correctly states the rights, duties, and obligations of each party as of this document's dates. Any prior agreement, promises, negotiations, or representations between the parties not expressly stated in this document are not binding. All subsequent modifications to this MOU shall be in writing and signed by the parties.

12. CONTROLLING LAW.

The validity of this MOU and of its terms or provisions, as well as the rights and duties of the parties hereunder, the interpretation, and performance of this MOU shall be governed by the laws of the State of California, County of San Mateo.

13. DISPUTE RESOLUTION.

Should any dispute arise out of this MOU, the parties shall first meet and confer in an attempt to resolve the dispute. Should such efforts fail to resolve the dispute within twenty (20) days, the parties shall meet in mediation and attempt to reach a resolution with the assistance of a mutually acceptable mediator. Neither party shall file legal action without first meeting in mediation and making a good faith attempt to reach a mediated resolution. The costs of the mediator, if any, shall be paid equally by the parties.

14. NOTICES.

Any notice, request, demand, or other communication required or permitted hereunder shall be deemed to be properly given when deposited in the United States mail, postage prepaid, addressed to:

- a. **San Mateo County:**
Michael P. Callagy, County Manager
400 County Center
Redwood City, CA 94063
(650) 363-4123
www.smcgov.org
- b. **County Office of Education:**
Nancy MaGee, San Mateo County Superintendent
101 Twin Dolphin Drive
Redwood City, CA 94065-1064
(650) 802-5300
www.smcoe.org
- c. **Silicon Valley Community Foundation:**
Erica Wood, Executive Vice President Impact Officer
2440 West El Camino Real, Suite 300
Mountain View, CA 94040-1498
(650) 450-5536
www.siliconvalleycf.org

[continued onto next page]

IN WITNESS WHEREOF, the parties hereto, by their duly authorized representatives, have affixed their hands.

Dated: _____

San Mateo County

By: _____
Michael P. Callagy, County Manager

Dated: 6/6/19

County Office of Education

B3
DW
JK
6/6/19

By: Nancy Magee
Nancy Magee, County Superintendent

Dated: 6/5/19
uw

Silicon Valley Community Foundation

By: Erica Wood uw
Erica Wood, Chief Community Impact Officer
Executive Vice President,
Community Impact

EXHIBIT A

The Big Lift FY 2019-2021 Budget

Revenue Sources	FY 2019-20	FY 2020-2021	Total
San Mateo County Measure K	\$ 7,700,000	\$ 7,700,000	\$ 15,400,000
Individual Donors and Private Foundations	\$ 825,928	\$ 967,877	\$ 1,793,805
Total	\$8,525,928	\$8,667,877	\$17,193,805
Paid with Measure K and Donation Funds			
EXPENSE	Year 5 Implementation 7/1/2019-6/30/2020	Year 6 Implementation 7/1/2020-6/30/2021	Change Rationale/Explanation
Preschool			
Cohort 1	\$ 3,364,000	\$ 3,364,000	
Cohort 2	\$ 897,000	\$ 897,000	
Total	\$ 4,261,000	\$ 4,261,000	
Preschool Quality - SMCOE			Quality supports include coaching, professional development and other quality supports
Total	\$ 400,000	\$ 400,000	
Preschool Program Management - SMCOE			SMOCE staff expenses to coordinate preschool quality improvements
Total	\$ 390,573	\$ 401,469	
Summer			
San Mateo County Library	\$ 1,127,020	\$ 1,127,020	Approximately \$1,600 per child. Increased summer expenses to serve 230 rising 3rd graders (SBPSD, SSFUSD, CUSD). All other districts have summer programming for 3rd grade and up. SMCL will manage summer program implementation. SVCF will oversee district contracts and provide oversight of districts.
School Districts	\$ 936,645	\$ 936,645	
BELL	\$ 304,000		
Total	\$ 2,367,665	\$ 2,063,665	
Attendance			
Total	\$ 101,000	\$ 101,000	In Class Today contract to support attendance mailings
P-3 Initiatives			
Total	\$ 22,270	\$ 23,384	Staff time to support grantee's P-3 initiatives
Family Engagement			
Total	\$ 197,075	\$ 202,470	Cost to implement Raising A Reader
Evaluation			
Total	\$ 447,418	\$ 555,492	Anticipated increase of RAND evaluation expenses to include third grade reading evaluation. This expense also includes data analyst salaries/benefits at SMCOE, cost to implement the Kindergarten Readiness Assessment and the cost to maintain Big Lift database
TBL Program Management - SVCF			
Total	\$ 338,926	\$ 355,398	Slight increases with COLA
	Subtotal	Subtotal	These costs can be funded by both Measure K and Donation Funds
	\$ 8,525,927	\$ 8,363,878	

Paid with Donation Funds Only (i.e., No Measure K funds)		
Summer		
BELL		\$304,000
Total		\$ 304,000
	Grand Total	Grand Total
	\$ 8,525,927	\$ 8,667,878

San Mateo County and SVCF agree that Measure K dollars will not fund the BELL services in FY 20-21. The BELL services can only be funded through donation monies.

	FY 2019-20	FY 2020-21
Increases	\$ 393,295	\$ 535,244

EXHIBIT B

DEFINITIONS OF DIRECT (PROGRAM) COSTS AND INDIRECT (ADMINISTRATIVE) COSTS

	<u>Direct (Program) Costs</u>	<u>Indirect (Administrative Costs)</u>
<u>Definition</u> ¹	Direct costs are those activities or services that benefit specific programs or projects, are easily traced to projects, and can be charged to projects on an item-by-item basis. These costs would typically not exist if it were not for the program or project.	Indirect costs are those activities or services that are necessary for organizational operations and could benefit more than one program or project. Their precise benefits to a specific program or project are often difficult to trace.
<u>Examples</u>	<ul style="list-style-type: none"> • Salaries and wages (i.e., direct labor costs). • Employee fringe benefits. • Travel of (direct labor) employees. • Materials, supplies and equipment purchased directly for use on a specific grant or contract. • Communications costs such as telephone use, mail and outreach related to the specific grant or project. • Reimbursement for program expenses incurred through Big Lift preschool contracts 	<ul style="list-style-type: none"> • Support services including accounting, information technology and legal services. • Criminal background checks. • Occupancy including rent, utilities, office equipment and office supplies not specifically used for the project. • Personnel related costs including Human Resources and payroll processing. • Insurance.
<u>Limitations</u>	<ul style="list-style-type: none"> • Direct costs are limited to those program costs listed on Attachments 1 and 2 to this Exhibit. 	<ul style="list-style-type: none"> • The aggregate amount of indirect costs reimbursed pursuant to this Agreement may not exceed 10% of the party's direct costs.

¹ See **Attachment A** and **Attachment B** for direct and indirect program costs for SVCF and the COE

ATTACHMENT C

SILICON VALLEY COMMUNITY FOUNDATION

Description of Direct and Indirect Expenses in Accordance with Proposed Definitions Provided to the County of San Mateo by SVCF on May 24, 2019.*

DIRECT (PROGRAM) EXPENSES

DIRECT GRANTS AND SUBCONTRACTED PROGRAM SERVICES

Includes grants to preschool providers, school districts, community-based agencies and summer learning providers to support implementation of The Big Lift's four programmatic pillars: high-quality preschool, inspiring summers, reducing absenteeism and family engagement.

- District and Preschool partners: Coastside Children's Program, City of Menlo Park, Cabrillo Unified School District, City of South San Francisco, Institute for Human and Social Development, Jefferson Elementary School District, La Honda Pescadero-Unified School District, Peninsula Family Service, Redwood City School District, Ravenswood City School District, San Bruno Park School District and South San Francisco School District
- Summer Partners: B.E.L.L. (Building Educated Leaders for Life); SMCL will be paid directly by the County
- Attendance Partners: In Class Today
- Family Engagement: Program supplies for Raising A Reader, including children's books, book bags, training materials;
- Evaluation: Supports external evaluation by the RAND Corporation or similar corporation to conduct rigorous process and impact evaluations on the collective impact of the four interventions and build the evidence base for The Big Lift's multifaceted approach; also includes costs for a universally implemented kindergarten readiness assessment in Big Lift communities.

PERSONNEL

*Staffing patterns/position titles subject to slight changes based on the need of the program and within the limits of the adopted Big Lift budget.

The Big Lift Director 1.0 FTE – Salary Range: \$115,000 - \$124,200

The Big Lift director oversees program implementation, evaluation, and compliance for the Big Lift, including oversight of the development of the preschool, summer, attendance and family engagement pillars, administration of competitive grantee processes, grantee monitoring, facilitation of the Core Team, ensuring integration and compliance with local grant requirements, providing technical assistance to Big Lift funded communities to support collective impact, providing training and TA to preschools, school districts and summer provider grantees and serving as the key point of contact for internal and external stakeholders including grantees, evaluation partners, consultants, and others to accomplish the initiative's goals and ensure integration across systems. The Big Lift Director also oversees meetings and communication between backbone organization's leadership team, oversees Big Lift marketing and communication strategy and coordinates fundraising efforts.

The Big Lift Grants Coordinator: .75 FTE – Salary Range: \$83,500 - \$90,000

The grants coordinator ensures SVCF and grantee compliance with local grant requirements including financial, administrative and programmatic requirements. The coordinator trains and supports preschools, school districts and summer providers in ensuring effective reporting and compliance and assists with grant-award preparation and monitoring. The coordinator is also responsible for managing contracts with

Big Lift providers and oversees the budgets and expenditures of The Big Lift's county and fundraised dollars.

Early Education Manager - .20 FTE – Salary Range: \$85,000 - \$92,000

This position is critical to furthering School District's efforts to ensure educational experiences in preschool through 3rd grade are connected, cohesive and build sequentially. The Early Education Manager will assist Big Lift districts to align expectations and practices between the public and private early learning community and the TK – 12 systems and to support both children and their families at key transition points.

Family Engagement Manager 1.0 FTE – Salary Range: \$82,500 - \$90,100

The Family Engagement Manager oversees implementation of the Raising A Reader (RAR) program in all Big Lift preschool classrooms; implements train-the-trainer model on other new family engagement strategies co-develops The Big Lift/RAR quality implementation plans with the Big Lift Associate; manages relationships with key Big Lift partners; submits financial, budgeting and evaluation reports.

Big Lift Associate (.25 - .50 FTE) – Salary Range: \$45,000 - \$50,000

The Big Lift Associate supports sites' implementation of Raising A Reader--the family engagement pillar of the Big Lift Initiative. The associate collaborates with the Family Engagement Manager to provide oversight for quality control, inventory management and delivery of teacher training and RAR materials to The Big Lift preschool classrooms; works with the RAR Initiative Officer on financial reporting, budgeting, evaluation reports, data collection and other administrative tasks. The Big Lift Associate also provides administrative support to The Big Lift Director.

Benefits:

Statutory benefits for the individuals listed above.

OPERATING EXPENSES

Operating expenses associated with activities directly related to The Big Lift, such as:

- Travel: including local mileage to grantee meetings, expenses associated with out of town travel to conferences, Campaign for Grade Level Reading community convening's and national conferences
- Training/Professional Development: Includes staff development and training expenses associated with conferences, seminars, workshop fees, training supplies and materials. Does not include travel.
- Consultants: Summer intern and other programmatic supports
- Supplies: Printing and materials for collaborative meetings to support Big Lift grantees and community convenings

INDIRECT (ADMINISTRATIVE) EXPENSES

SVCF indirect rate is 20% of SVCF actual personnel and benefits expenditure. Indirect costs will only be paid for salary and benefits associated with SVCF employees and RAR employees identified in the adopted budget.

ATTACHMENT D

SAN MATEO COUNTY OFFICE OF EDUCATION

Description of Direct and Indirect Expenses in Accordance with Proposed Definitions Provided by COE to the County of San Mateo on March 11, 2016 and updated on May 24, 2019

DIRECT (PROGRAM) EXPENSES

PERSONNEL

Early Learning Support Services (ELSS) Administrator, .125 FTE, Salary Range: \$168,047-173,088

The ELSS Director serves as a member of the Core Team, helping to advise and oversee Big Lift implementation. The Administrator oversees COE's multiple early learning initiatives in the San Mateo County community. The ELSS Director has a special focus on systems change and collaboration, playing a major role integrating The Big Lift with other countywide efforts.

Coordinator, Early Learning Quality Improvement Initiatives (ELQII), 1.0 FTE, Salary Range: \$153,543-\$158,149

The Coordinator (Diana Harlick) serves on The Big Lift Core Team and assists in countywide planning, budget development, strategy and evaluation of The Big Lift. She leads and oversees the quality preschool and evaluation strategies of The Big Lift, and also supports the family engagement and summer pillars. She works with COE staff and contracted partners to ensure that QRIS ratings are completed, Quality Improvement Plans (QIPs) are developed, related coaching is provided, and that family engagement services are integrated and embedded within preschool programs. Other responsibilities include overseeing data collection and evaluation for all pillars of The Big Lift, providing technical assistance to grantees, attending and being a resource at local Big Lift collaborative meetings, coordinating all aspects of the Online Ages & Stages Questionnaire (developmental screening data hub), overseeing the Ready4K text messaging program, overseeing the administration of the universal kindergarten readiness assessment (Brigance) with Big Lift districts, supporting and promoting preschool-to-third grade alignment strategies, communicating and reporting Big Lift evaluation and implementation data, and serving as the lead COE contact with RAND for the external evaluation. She oversees the Inspiring Summers online registration and priority ranking process. She manages the COE's Big Lift budget and all related quality improvement, subcontractor, consultant, and evaluation services. She supervises the 1.6 FTE Big Lift data analysts and a .5 FTE administrative assistant.

Data Analysts, 1.6 FTE, Salary Range: \$88,374-\$97,434

The Big Lift data analysts play a critical role in supporting data collection and evaluation for The Big Lift. The data analysts provide training and technical assistance to preschool programs and school districts in The Big Lift data collection requirements and in the Vertical Change data system, the required data system for The Big Lift. They monitor data collection and entry, follow-up weekly on missing data with grantees, troubleshoot data quality issues, and clean and analyze data on a regular basis to meet program needs and Big Lift internal and external data requests. The 1.0 FTE position manages the day-to-day administration of the Brigance, including training all kindergarten teachers, setting up assessment systems, receiving data, overseeing data entry, cleaning data, analyzing data and sending data to RAND. This position also oversees all district data transfers and data cleaning for the external evaluation (e.g. Fountas & Pinnell and demographic data). The .6 FTE position has a special emphasis on the Big Lift Inspiring Summers (BLIS) program, serving as the key data staff person managing BLIS enrollment, ranking, and data tracking; training BLIS staff in Vertical Change; and monitoring data collection and entry for BLIS. The .6 position likewise manages the InClass Today intervention for preschool, providing the required data extracts. The data analysts also obtain PreK SSIDs for preschool children in order to track them over time, populate an annual data dashboard with metrics

for each pillar for all 7 districts, and perform other critical data tasks as needed/requested.

Division Accountant, .15 FTE, leveraged starting in FY 19-20 (will not be charged to The Big Lift)

This amount reflects time spent by accountant staff to support The Big Lift COE budget and provide technical assistance to Big Lift preschool programs that also have other funding streams. This position works closely with the SVCF to ensure fiscal accountability and compliance with state and federal fiscal regulations for ECE programs.

Bilingual Administrative Assistant, .5 FTE, Salary Range: \$55,583-\$63,132

The bilingual administrative assistant (Monica Xuereb) directly supports The Big Lift. This position provides program support to The Big Lift preschool initiative, including processing of purchase orders and related invoices for services; monitoring and reviewing invoices submitted by consultant coaches; extensive data entry of client information and services into the Vertical Change database; supporting Brigance administration; translating for Spanish speaking clients and materials, including outreach strategies; and providing administrative support to the Coordinator on all aspects of Big Lift implementation (including scheduling meetings, providing logistical support for meetings and training, helping to execute agreements, etc.).

Benefits

Statutory benefits and associated costs of employment will be charged at approx. 46%

SUBCONTRACTED PROGRAM SERVICES

Big Lift Centralized Database

This represents The Big Lift contribution towards the development, hosting and maintenance of the Vertical Change web-based program administration database. Vertical Change is the new centralized database for the Big Lift as of FY 18-19, and is utilized by all preschool programs, coaches, BLIS programs, Raising A Reader and Parent Cafes to store individual level child, family, classroom, teacher, and agency descriptive and service data. Vertical Change is funded through a shared cost approach with contributions also secured from First 5 San Mateo, First 5 CA IMPACT, and the QRIS Block Grants.

ECERS & CLASS Assessments

These funds support external assessments conducted by valid and reliable observers as part of the Quality Rating and Improvement System (QRIS). Programs are rated every two years. The Early Childhood Environmental Rating Scale (ECERS) and Classroom Assessment Scoring System (CLASS) are two, research-based measures of program quality that are part of a site's QRIS rating process. The ECERS focuses on structural aspects of the classroom environment including learning materials, classroom set-up and health and safety. The CLASS focuses on high quality teacher-child interactions; scores on the CLASS are predictive of children's later performance in elementary school. (Additional rating costs are leveraged through QRIS and First 5 funds.)

Professional Development & Targeted TA – Various

This line item will support the training and professional development (PD) needs of programs, with a special focus on preschool curriculum and preschool-to-third grade alignment. In the area of curriculum, The Big Lift will offer PD workshops and Professional Learning Communities (PLCs) on *Creative Curriculum* and separate but integrated workshops/PLCs on developmentally appropriate early math and literacy content. The early math and literacy focus will simultaneously advance preschool-to-third grade alignment by engaging both preschool and kindergarten teachers and administrators in the PD activities. Funds will also

be used to develop concrete curriculum and lesson planning tools for programs that will facilitate the use of evidence-based early literacy and math practices.

Stipends for Professional Development

Stipends to incentivize participation in professional development, with a focus on the SMCOE preschool leadership development cohort (Big Lift directors) and curriculum trainings (Big Lift teachers).

Communications Consultant

TBL communications consultant develops content for and distributes the online *The Big Lift Educator Exchange*, a monthly newsletter targeted to Big Lift preschool teachers. The purpose of the newsletter is to build community among Big Lift teachers, increase their awareness about and connection to The Big Lift, ensure they are aware of upcoming professional development opportunities, and increase their knowledge of helpful research, resources, services, and practices that are pertinent to their work.

Consultant Coaches

Consultant Coaches provide intensive, on-site coaching and technical assistance (TA) to Big Lift preschool programs to improve their quality. Coaches work with programs to develop Quality Improvement Plans (QIPs) and then provide targeted coaching and TA to preschool staff to achieve the goals established in their QIPs. Coaching involves observing teachers in the classroom and modeling new instructional skills for teachers to acquire. Programs work mostly with an assigned, lead coach and sometimes also have access to specialist coaches, as needed. Coaching skills and practice is supported through the COE Coaching Collaborative, a cross-agency collaborative implementing a common approach to coaching in San Mateo County. Available funds support 3-11 hours per classroom per month, depending on need. 96 preschool classroom sessions at 37 physical sites receive Big Lift coaching supports.

ASQ/ASQ:SE (Development Screening)

Technical assistance and coaching to preschool programs to strengthen their practices in developmental screening and follow-up for children with developmental concerns.

Parenting Support

This supports the *Play to Grow* positive parenting series and PLCs for Big Lift family support staff. The *Play to Grow* positive parenting series is part of TBL family engagement pillar, and addresses an identified need for additional parenting support from TBL needs assessment. It is adapted from the evidence-based program *The Incredible Years*. The series is five sessions long and educates parents on early brain development, parent-child interactions that promote child development, and positive discipline approaches for children's challenging behaviors. Several series are offered to parents at Big Lift preschool sites. The second activity planned is PLCs for family support staff embedded in Big Lift programs. The PLCs will bring staff together to align and deepen practices for addressing the trauma and service needs of high stress, very low-income Big Lift families.

Conference/Summits

Plan and implement a late winter/early spring 2019 inspirational teacher event to continue to build community, recognize preschool staff's critical role in The Big Lift, and inspire and educate preschool staff. It will be hosted at the COE offices or another no- or low-cost venue. Funds will support food, participant recognition items, honoraria for speakers and a program and materials.

Kindergarten Readiness Assessment

COE manages the administration of The Big Lift Kindergarten Readiness Assessment (KRA), administered annually to all incoming kindergartners in all Big Lift school districts. Funding covers: 1) Data entry costs; 2)

Brigance materials and teacher training; and 3) Reimbursement from SVCF for COE support to two Close the Gap districts administering the KRA (Brisbane & Bayshore) (\$4,500). District incurred costs for the KRA (kindergarten teacher training stipends, substitute teacher costs, and language support) are included in districts' direct contracts with SVCF.

Translation/Interpretation

Funds needed to translate the annual updates to The Big Lift data collection and evaluation forms into the five different languages required by Big Lift school districts. AVID Translation will be contracted with to provide necessary translation.

Update Family Fee Schedule (Mission Analytics)

Annual update needed to revise The Big Lift family fee schedule to align with the latest family fee schedule from the California Department of Education.

Refreshments

Refreshments for quarterly Big Lift preschool directors' meetings, and other leadership meetings as needed.

OPERATING EXPENSES

Materials & Supplies

These are materials and supplies for direct use in Big Lift implementation; consumable items needed for project operations and correspondence.

Photocopy Expenses

Internal photocopy (black & white and color) costs for daily copying; small volume; high frequency to support implementation of various Big Lift strategies.

Noncapitalized Equipment

Workstation costs for new data analyst

Mileage Reimbursement

This is mileage directly related to attending Big Lift meetings, including attending local Big Lift collaborative meetings, meeting with grantees, meeting with SVCF, and Core Team meetings.

Staff Development / Conference

These funds support the Coordinator and Data Analysts to annually attend trainings and conferences as necessary for professional development and to implement Big Lift scope of work activities.

Printing Expense

These are printing charges for high volume, low frequency Big Lift materials that require print vendor capabilities beyond department photocopier. The annual BLIS outreach mailing is supported with these funds.

Postage / Shipping Charges

Mailing of materials to Big Lift subcontractors; Big Lift outreach to community to recruit for trainings, etc.

INDIRECT (ADMINISTRATIVE) EXPENSES

Indirect Costs

The County will pay indirect costs on the expenses associated with salaries and benefits of the COE employees identified in the adopted budget. The rate for COE indirect costs will be the rate adopted by the CA Department of Education (CDE) for COE for FY 18-19. In FY 19-20, this rate will be 12.64%. In FY 20-21, the rate is unknown (rates are updated annually by CDE).