Evaluation Services for the New Illinois Learning Standards

TECHNICAL PROPOSAL

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Submitted by:
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## OFFEROR/STAFF QUALIFICATIONS

### Prior and Demonstrated Experience (D4.1)

- Case Study 1: Evaluation of College Illinois’ Market Potential
- Case Study 2: Evaluation of State of Illinois Gaming for Illinois Lottery
- Case Study 3: Developing Case Studies and Video Clips for Brookfield Zoo

### Offeror’s Qualification (D4.2)

- Relevant Management Experience Managing Research & Evaluation (40 pts)
- Personnel Qualifications (40 pts)
- Experience working with State/Federal Program Staff (40 pts)
- Evidence of Capacity to Produce Case Studies, Vignettes, Video Clips (40 pts)
- Demonstrated Effective Communication to Technical and Non-Technical Stakeholders (40 pts)
EXECUTIVE SUMMARY

Introduction
Affect is a strategic research and consulting firm that helps organizations gather insights and conduct complex evaluations. Established in 1994, the company is based in Illinois and is a small, woman-owned business and a certified BEP vendor. The company is pleased to provide a proposal to the Illinois State Board of Education for Evaluation Services for the New Illinois Learning Standards (ILS).

Affect works closely with a broad range of organizations to design evaluations, collect and analyze data, and report findings. Affect is recognized as one of the leading firms in the United States for research and evaluation, and has shared large national IDIQ evaluation contracts with companies in other states, such as Westat, ABT Associates, Deloitte, NORC and ORC/Macro International. Affect provides a sophisticated level of consultation and implementation on complex studies that have high visibility and importance.

The company has experience working with organizations to perform research and evaluation in the education market on behalf of government agencies and Fortune 500 companies that serve the public and private schools. It has staged educational evaluations with diverse audiences, incorporating inner city schools, historically Black Colleges and Universities, affluent communities, and predominantly Hispanic schools where English is a second language. Affect has successfully conducted qualitative and quantitative research with school administrators (including superintendents and principals), curriculum developers, teachers, parents and students of different ages.

Affect provides research to many different types of organizations and works with clients that have varying degrees of experience with the research process. Its consultants work diligently to make complex research easy to understand and are accustomed to providing training support in evaluation to various organizations.

More specifically, Affect provides qualitative and quantitative research services to Federal and State governments, Fortune 500 companies, educational institutions and not-for-profit organizations. Within the State of Illinois, we provide research and evaluation services to the Art Institute of Chicago, Abbott Labs, Advocate Health Care, Brookfield Zoo, DePaul University, Illinois Lottery (State of Illinois), Rush University Medical Center, Sacred Heart Schools, Shedd Aquarium, Quaker Oats/PepsiCo and Walgreen’s. At the Federal level, we have executed national and state-based evaluations for CDC, CMS, NHTSA, US Army and USDA. Working with these organizations, we have earned a reputation for excellence in research and evaluation, and for delivering work on time and on budget.

Affect has conducted extensive qualitative and quantitative research within the State of Illinois, which has helped broaden our awareness of the unique challenges of conducting research in our state. Some of these challenges include ensuring the sample is diverse and representative of residents by age, ethnicity, language spoken in the home, and income.

Overview of the Process
In order to evaluate the implementation of ILS that incorporate the Common Core State Standards (CCSS) for Illinois school districts, Affect will work closely with state program managers at ISBE to establish, shape and refine a work plan for conducting a robust, state-wide evaluation. We have outlined a preliminary work plan in the next section.

The work plan proposed by Affect will not only identify which Illinois school districts have fully implemented the CCSS in mathematics and English language arts, but will also provide insight into the proportion of school districts that are at earlier stages of implementation as defined by a rubric we will develop and apply throughout subsequent qualitative and quantitative research. This research will provide insight into best practices for ILS implementation,
drivers and barriers to implementation, and optimal pathways to ensure future implementation. We will document these best practices through video case studies which can be disseminated via ISBE’s website or directly to schools.

Initially, Affect will tap the current “Considerations for Implementing the New Illinois Learning Standards” grids, the 2004 rubric, secondary research, and stakeholder input to build a new rubric that can serve as the foundation for the planned evaluation. To inform rubric development, we will initially conduct a secondary literature review to identify and review rubrics in use by other states. We will also conduct 20 in-depth interviews with stakeholders (internal and external to ISBE) focused on gathering input into rubric and questionnaire development. These stakeholders may include ISBE leadership, individuals guiding ILS implementation regionally, individuals providing statewide/regional support and other education experts.

Upon completing the rubric, Affect will design and implement a multi-mode quantitative survey sent to personnel in 2000 Illinois schools. One questionnaire will be developed to survey district superintendents, assistant superintendents, principals and curriculum directors; and another questionnaire will be prepared for teachers by grade band. Each of the grade band surveys will include a design that will allow teachers to specify whether they can answer for all grades in the band or only for one grade, and also whether they can respond for mathematics and/or English language arts, or only one specific subject.

The questionnaires would be administered via a programmed online survey and also made available upon request, in paper format. That is participants could choose to complete the survey on the web or request a hard copy, mail-based survey online or by phone. The web survey would be programmed for device flexibility, meaning that the survey screens will size to the device whether it is a PC screen, a tablet/iPad or a smart phone. By allowing for device flexibility, we ensure that response rates are higher and more representative of the target audience.

Affect would gather and tabulate the data from the survey, integrating standardized test scores for the district, school, and grade level into the dataset matched to respondents. Affect would also build a scoring system that would allow data gathered to be used in assigning schools to various tiers of implementation, most basically from “full implementation” to “beginning implementation.” Other tiering approaches may also be explored and applied based upon the distribution or clustering of school personnel responses to a battery of implementation proof points included on the survey. Upon building a comprehensive data set, Affect will begin statistical analysis to identify a relationship between implementation stage and student performance, and also to reveal potential drivers or barriers to implementation. Ultimately, we propose to use structural equation modeling as a vehicle to predict pathways both to implementation and enhanced student performance.

After conducting the quantitative research, Affect will use the dataset to classify school districts into stages of implementation. This information will be used as a basis for recruiting and assigning respondents into one of 30 focus groups. Affect will conduct 30 focus groups with school personnel, including school administrators, principals, and teachers at various grade levels.

Affect will use telephone focus groups as a mechanism for reaching out to a broad range of educators throughout the state, instead of just concentrating groups in select schools. This will also help to reduce costs and make the information gathered more representative of the state.

Affect will analyze the feedback and prepare a focus group report summarizing key discussion themes by implementation stage, role, and grade level. The report will make recommendations for how to move schools from one stage of implementation to another. It will also help identify best practices in implementation, as well as the drivers and barriers to implementation through the eyes of front-line teachers and administrators.

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Finally, Aeffect will select specific schools and school personnel from the survey and focus groups that will be ideal for four to six case study profiles. Case study profiles will be prepared and written. Site visits will be filmed at select schools, and then edited into a final video that can be used by ISBE to inform educators about best practices for implementing the new ILS.

Aeffect will prepare four evaluation reports throughout different stages of the project. The first report will summarize results of secondary research and 20 stakeholder interviews. The second report will summarize findings from the quantitative research and analyses. The third report will document qualitative research and discussion themes. The final report will provide an overview of all stages of the evaluation and impart final takeaway from discoveries made during the comprehensive research process.
WORK PLAN (800 pts)

Detailed process for creating an implementation rubric, survey and tools to determine successful implementation of ILS (50 pts)

Initially, Aeffect will work with ISBE to design and conduct secondary research and 20 in-depth interviews with stakeholders (internal and external to SBE) to shape the evaluation. These stakeholders may include ISBE leadership, individuals guiding ILS implementation, individuals providing statewide/regions support, experts in other states, etc.

The focus of the secondary research will be to examine and profile ways other states are currently evaluating implementation of CCSS outside of Illinois. This will help us understand varied frameworks for the ILS evaluation, and give us content strategies to consider. A more detailed description of the secondary research process is outlined on page 10.

The focus of the stakeholder interviews will be to gather input that can be used to develop a successful rubric design and effective survey tool and to examine idea approaches for sampling and surveying school districts. Aeffect will work with ISBE to identify a list of potential participants, and will then recruit and schedule them to complete a 30-45 minute interview. Aeffect will develop an interview guide for ISBE’s review and approval. This guide will outline questions to be addressed and the amount of interview time to be spent on each topic. A professional moderator with 20+ years of experience conducting executive interviews will conduct the interviews.

During the interview with stakeholders, we may expose participants to rubric examples from other states or existing drafts for Illinois to spur commentary and discussion. We will also explore alternative survey sampling strategies and discuss their impression of the categories of questions which should be included on the survey. While the stakeholder interviews will be conducted via phone, we will send out the materials to be reviewed electronically or by priority mail a few days in advance. Any ISBE stakeholder interviews will be conducted in person.

While Aeffect has laid out a preliminary work plan below, we are open to shaping and honing that plan through feedback shared by internal and external stakeholders to this process. By building the evaluation around stakeholder and expert feedback, we will ensure that a broad range of voices are heard and considered in developing the approach to this research. Upon completing the interviews, Aeffect will develop a topline report summarizing discussion themes and will de-brief with SBE on the results. Following this de-briefing, we will summarized the interview and secondary research feedback into a refined work plan that includes a survey instrument, random sampling plan and rubric, which are included as part of Deliverable 1:

Deliverable 1 (Start date: Nov 1, 2014)
- Create survey
- Create random sampling plan
- Create a successful rubric

Design and implement strategies to sufficiently collect evidence of implementation from each sample site (75 pts)

Aeffect will develop a survey that features a battery of evidence markers or proof points for implementation. We will develop these proof points both from the ILS themselves, as well as through the secondary research and
stakeholder interviews. The evidence of implementation will generally exist at planner/implementer levels, i.e. through the eyes of curriculum developers and teachers. We will include batteries of these proof points in the surveys for these two audiences. The survey will be savable, so that teachers can pause and return to finish the survey if they need to obtain information in order to complete the proof point inventory.

Affect will also collect the most recent standardized test scores for each district and school by grade level and will enter those metrics into the survey database matched to participant records. We can obtain that information from websites and data enter it, or if ISBE can provide that information in a flat file, then we can more easily match it electronically to the respondents by district number and grade level.

Using the action proof points, we will be able to develop a scoring model to substantiate a district’s assignment into “full,” “partial,” or “beginning” implementation, or whatever levels we ultimately choose to utilize. We will then want to statistically examine whether there is a relationship (correlation) between the level of implementation and student performance or performance change. This can be achieved through a statistical procedure called correlation analysis. It basically shows us which variables are related, how strong of a relationship exists, and whether the resulting relationship is statistically significant.

We may also use cluster analysis to show how the information clusters into groups. We could then use discriminant analysis to identify how to predict the clusters. This will help us understand whether our initial scoring model of the three groups above—full, partial, or beginning—is accurate or whether there are actually more schools clustered around different stages. When we begin statistical modeling, we will involve a senior statistician/Stanford PhD who can help your team understand the processes and the interpretations.

**Methodology for qualitative and quantitative research (100 pts)**

**Qualitative Research (Focus Groups) with District Personnel.** Affect will work with ISBE to design and conduct 30 focus groups with district personnel. We will segment the group participants by position type, role/instructional focus, grade level and implementation stage. By splitting the groups in this manner, we will be able to isolate themes by each of these groups. Additionally, by structuring the groups by implementation stage, we will be able to more effectively identify drivers and barriers to implementation, as well as best practices among the full implementers. The groups will be structured as follows:

- Three focus groups with superintendents (one group with full implementers, one group with partial implementers, and one group with beginning implementers)

- Three focus groups with principals (one group with full implementers, one group with partial implementers, and one group with beginning implementers)

- Three focus groups with curriculum developers (one group with full implementers, one group with partial implementers, and one group with beginning implementers)

- Three focus groups with technology leaders (one group with full implementers, one group with partial implementers, and one group with beginning implementers)

- Three focus groups with high school math teachers (one group with full implementers, one group with partial implementers, and one group with beginning implementers)
• Three focus groups with *high school English/language arts teachers* (one group with full implementers, one group with partial implementers, and one group with beginning implementers)

• Three focus groups with *6th-8th grade math teachers* (one group with full implementers, one group with partial implementers, and one group with beginning implementers)

• Three focus groups with *6th-8th grade English/language arts teachers* (one group with full implementers, one group with partial implementers, and one group with beginning implementers)

• Three focus groups with *3rd-5th grade teachers* (one group with full implementers, one group with partial implementers, and one group with beginning implementers)

• Three focus groups with *K-2nd grade teachers* (one group with full implementers, one group with partial implementers, and one group with beginning implementers)

We will select and recruit group participants to be geographically diverse, linking respondents from different areas of the state together for participation in telephone focus groups. The benefits of telephone focus groups are that respondents can participate conveniently from their homes and that it reduces typical costs associated with focus group facility rental, travel, etc. which will allow us to tap into input from more educators. It also reduces the burden on ISBE observers to attend/observe focus groups in the evening, given that they can go home and tap in periodically as it is convenient for them to do so.

Achieving a geographically diverse sample will help build shared insight among educators for the challenges faced in different educational environments (e.g. inner city schools, rural market schools, affluent district schools, etc.) In qualitative research, when participants are different and have different backgrounds, they are often more compelled to tell their story, assuming it is not the same as everyone else’s story. This often yields a higher level of richness and depth of conversation. Comparing and contrasting strategies to implement may also help foster ideas and feedback from educators on how to address or overcome barriers to implementation, and/or strategies for embracing best practices that can be extended statewide.

Affect would utilize survey data to select and assign respondents to groups based upon their district/school’s stage of implementation, and would supplement the records with another database, as needed. We would recruit 10 participants for 6-8 to show for each focus group. We would work to achieve geographic diversity in each group, recruiting one respondent from ISBE pre-established support regions, Cook County (Chicago, West Wook, South Cook North Coo), I-Northeast, II-Northwest, III-West Central, IV-East Central, V-Southwest and VI-Southeast. Respondents would be assigned to groups by their stage of implementation.

Affect would prepare a screening questionnaire for ISBE’s approval that will be used to recruit and assign participants to focus groups. The recruiting process will be managed by phone and email, and respondents, once recruited will receive an email reminder and call-in instruction. They will receive instruction on what it will be like to participate in the group discussion in advance to increase their comfort level.

Affect will also prepare an interview schedule and group discussion guide tailored to each respondent type. The interview schedule will include dates and times the group will be held. The discussion guide will include areas of questioning agreed upon in advance with ISBE, and will include warm-up and introductions, implementation strategies or actions, drivers to implementation, barriers to implementation, future enablers (e.g. technology, resources, etc.) and how they might help to spur implementation.

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All focus groups will be digitally recorded and recordings will be posted to a password protected website where ISBE can access, download and listen to recordings. There will also be an opportunity to listen to the groups live and to feed questions or comments to the moderator electronically.

Upon completing the focus groups, Aeffect will transcribe the recordings, perform content analysis of the transcripts, and identify themes which exist by role, grade and implementation stage. Aeffect will then prepare a written support summarizing the themes observed, and including select verbatim quotes from participants to illustrate various ideas. The report will include an executive summary, objectives, methodology, summary of findings, detailed findings with verbatim comments, conclusions/recommendations, and appendix of materials used/created to conduct the research. Aeffect will initially submit a draft report for ISBE’s review, and will then refine the report to address any questions or comments.

Upon completion of this task, Aeffect will have completed all of the line items listed in Deliverable 2 below, as well as provided a screening questionnaire, group discussion guide to access digital focus group recordings, group transcriptions, and a focus group report of findings:

**Deliverable 2 (Oct 1, 2014 – Jan 1, 2015):**
- Gathering requisite information
- Identify strategies for selecting participants for interviews based upon survey results/rubric
- Create interview schedule for 2015 based upon scope of work
- Interview participating stakeholders personnel

**Quantitative Research with School Districts.** In order to conduct the required quantitative research, Aeffect would design and implement an online and mail survey with a stratified random sample of school districts. More specifically, we will seek to collect a readable sample with data from 800 elementary schools, 600 middle schools, and 600 high schools. A sample size of 600+ schools will allow for a margin of error no greater than +/-4 percentage points by school type, which we believe to be an appropriate margin of error for this evaluation. In total, the number of schools represented will be about 2,000.

Essentially, Aeffect will distribute the survey to personnel in all Illinois middle schools and high schools (about 750 schools each) and will attempt to achieve a response rate of about 80%. We will randomly select personnel in 1,000 elementary schools, again requiring a response rate of 80%. We will use reminder emails and post card drops to boost response rates to desirable levels.

Within the middle and high schools surveyed, we will attempt to survey the principal, math teacher, and English language arts teacher. This means that our middle school sample will be n=1,800 respondents, and our high school sample will be n=1,800 respondents.

For the elementary schools surveyed, we will attempt to survey the principal and a classroom teacher within K-2 and 3-5 grade bands. We will vary grades selected within the bands, but attempt to secure a total sample of 2,400 respondents, with 800 elementary school principals, 800 K-2nd grade teachers, and 800 3rd-5th grade teachers.
Affect would also survey superintendents/assistant superintendents in approximately 888-900 Illinois school districts. In total we would expect to survey n=6,000 teachers and principals, and as many superintendents as we can reach and persuade to respond.

**How the information will be gathered and analyzed (50 pts)**

Affect will gather quantitative feedback using a web-based survey. The survey will take approximately 15-20 minutes for educators to complete. It will be developed and programmed for online administration.

Affect will send e-mail invitations to educators so that they can click on a survey link to complete the survey. We will offer two raffle prizes as rewards for their time and cooperation, which is standard today with online surveys. This will provide an incentive to ensure response rates are strong and hence representative statewide.

The programmed survey will be flexible and scalable to the device used to complete the survey. For example, if the respondent completes the survey on a tablet/iPad or mobile phone the survey screen will be scaled fit on that device’s screen. We need to have a scalable survey to avoid people from terminating if they’re having difficulty controlling responses.

Affect will monitor incoming survey responses daily during the data collection period. We will make a data dashboard available to ISBE so that it can monitor survey completions and monitor data on key metrics as it is received. The data dashboard will be accessed through a password protected website. Affect will provide direction for using the dashboard and will debrief with ISBE weekly to discuss fieldwork progress.

Once the data is collected, it will be tabulated using a proprietary data collection program. The program will tabulate results for each question in percentage frequencies and means, and present the results for the total sample and any relevant subgroup breaks that are desired (e.g. principal, K-2 teacher, 3-5 teacher, etc.) We will create a total of three sets of data tabulations, each with a different mix of subgroup breaks for analysis. The tabulations will be sent to ISBE for its review as well.

With tabulations in hand, Affect will review the survey results and examine differences by subgroup. We will create a topline report summarizing key metrics in an easy-to-use and read format for ISBE’s quick reference.

We will also then incorporate and link student performance/test score data for grade and district to the dataset. We will also score and assign the school districts to analytically derived implementation status codes. This may range from full to partial to beginning implementation, or to a more detailed sliding scale that we create.

From there, Affect will begin statistical analysis to identify relationships between stage of implementation and student performance, and also to examine relationships between various enabling factor/drivers or barriers that lead to implementation. To do this, we would use correlation and regression analyses.

Ideally, we would like to identify the correlations and pathways that lead to enhanced student performance identifying that implementation of new ILS is a key step in the pathway. To do this, we would propose to use structural equation modeling, a statistical tool that helps researchers identify how steps in a process lay out and rank in relative importance to one another.
Protocols for interviews and focus groups (50 pts)

Prior to contacting participants to participate in qualitative or quantitative research, Aeffect will draft a letter for ISBE to send by mail or electronically to school administrators and teachers in the State of Illinois explaining the purpose of the research, identifying Aeffect as the independent research firm selected to gather the data, and reinforcing the importance of their participation if/when they are contacted to participate. This is a very important first step and protocol because it has been shown to increase response rates by as much as 50%. It cannot be overlooked.

Next, Aeffect will prepare protocols for screening participants to participate and for ensuring their inclusion in the study. One simple protocol will be that respondents need to meet and match select recruitment criteria for the survey or focus group they are to participate in. We will also have recruitment criteria that may vary or be capped, such as the number of schools, number of individuals matching specific roles, or from specific geographies.

Another set of protocols will relate to standards when conducting online research, such as the length of time each respondent must spend answering questions and the variability in answers expected. For example, we might choose to recommend “speeders” and “cheaters” who rush through the survey clicking the same answer to every question and complete the survey so quickly that we know they did not adequately read and consider each question text.

Last, we will also have some protocols put in place for human subjects protection and confidentiality, meaning that Aeffect will inform participants when they are being observed and recorded, and will obtain their release or permission for featuring them in future case studies or videos. We will not release the names of participants in order to guarantee greater honesty through anonymity and confidentiality.

These are but a few of the protocols, but there are many. They are generally implemented in order to ensure consistency in the research process, to improve accuracy, to eliminate bias, and to ward off future liability related to the release of unauthorized confidential information.

Detailed strategies used to research, review and report how other states are implementing common core standards and how communicated (25 pts)

Aeffect will perform secondary research to examine articles and communications released by other states on their approach to implementing CCSS and how they have evaluated implementation.

Aeffect will use a proven search definition strategy when conducting the literature search review. This versatile search definition strategy involves following three stages of search preparation: (1) identifying key concepts, (2) creating a custom search thesaurus – brainstorm alternative search terms/phrases (synonyms, descriptors, keyword associations, etc.) and (3) refining search criteria (implement date restrictions, target audience parameters, etc.)

Often referred to as a “funnel methodology,” this strategy starts with very broad concepts and whittles the search effort down to extremely specific search strings. Once we develop our search definition strategy, we apply these search definitions to different sources. Currently, we utilize a variety of online meta-databases to complete our literature searches, including, but not limited to, Medline/PubMed, ERIC, CHID, and DJInteractive. As the nomenclature implies, Medline/PubMed focuses on medical and health sciences literature and might prove useful for identifying communications strategies. DJInteractive, ERIC, CHID, and Lexis Nexis provide access to...
sources of literature in the fields of psychology and sociology – genres of literature that provide in-depth information regarding decision making and relevant social theory models. We will also search educational journals and state department of education websites.

To assess the relevance of various articles identified in the search, we look at the key index terms that the article is listed under in the database to confirm that the main topic of the article is on-target with its related key concept. In addition, we will employ researcher scanning as a technique to identify relevant articles. These relevant articles will then be subjected to various procedures for assessing the credibility of the article such as examining (1) the author’s reputation in his/her field, (2) the periodical’s credibility, (3) the soundness of the study’s methodology, and (4) the quality of the references cited.

Upon completion of the search, Aeffect will complete an annotated summary report. The report will consist of a presentation of findings organized by key issues related to the search topics. The report will also contain an analysis of the sources, discussion of findings and conclusions, implications and recommendations regarding execution of subsequent steps in this evaluation.

**Communication plan with ISBE staff on the evaluation project and method of disseminating findings (50 pts)**

Having worked with government agencies for over 15 years, Aeffect has developed a monthly reporting format and process that ensures our clients are up-to-date on all project activities. Aeffect will prepare a monthly status report for ISBE on this project.

The monthly report will include: a breakdown of staff hours by category, cumulative totals of staff hours, any direct costs including those from consultants or other external vendors, remaining budget, a summary of all tasks accomplished for the past month, anticipated tasks to be completed the following month, and any problems or limitations encountered or anticipated on the project and how we propose addressing these. If there are any additional items of special interest or relevance, these will also be discussed in the report.

The Project Director will prepare and review the monthly report and it will also be further verified and confirmed by Aeffect’s finance and accounting department prior to submission. Corresponding monthly invoices will also be sent subsequent to monthly reports and can be used as a means to verify and confirm all charges. Aeffect typically sends all monthly reports to government clients by the 10th of each month, but this date can be adjusted to accommodate ISBE’s schedule and needs.

In addition, Aeffect will conduct monthly conference calls with ISBE after submitting the monthly report for review. This follow-up call would be arranged for a mutually agreeable date. Its purpose would be to review the monthly report, address any questions or concerns, and gather any feedback or input that ISBE has to offer. We believe that regular interaction at various stages of the project will be particularly relevant for ISBE and helpful to our staff.

Through our work with government organizations, Aeffect is sensitive to project cost agreements, and is accustomed not only to consistently delivering work on budget, but also to keeping contracting officers and contract technical officer representatives (COTRs) informed and advised of budget utilization to date, as well as budget projections. We are also experienced in working with limited resources and have developed expertise in ensuring all resources are used wisely and to their fullest. Lastly, through our work with government organizations, as well as for fast-paced corporations, we are also sensitive to the importance of completing...
engagements in the time allotted and adhering to pre-established performance timelines or schedules for provision of project deliverables.

Through effective communications and partnering, Affect will provide ISBE with the requirements for deliverable 6, shown below:

**Deliverable 6 (Ongoing)**
- Monthly progress reports to ISBE

**Preparation of the annual evaluation reports (75 pts)**
Affect will provide four reports at various stages of the evaluation. The reports will cover the topics specified below:

**Deliverable 2 (Oct 1, 2014 – Jan 1, 2015) – IDIs and Secondary Research**
**Deliverable 3 (Jan 1, 2015 – Jun 30, 2016) – Quantitative Research**
**Deliverable 4 (Jul 1, 2015 – Jun 30, 2016) – Focus Groups**
- Submit end-of-year reports
- Submit final report

Each report will include the following sections: introduction, objectives, methodology, limitations, summary of findings, detailed findings, conclusions/recommendations, and appendix (materials used).

Reports would be provided in MS Word and PDFs will be provided and made accessible online. If ISBE requires versions of the report in MS Powerpoint presentation format or in a 508 compliant format for use online, Affect can certainly provide those services at an additional cost. We have not included these items since they were not specified in the current statement of work.

**Gathering, creating, editing and disseminating the case studies, vignettes, video clips (100 pts)**
Affect regularly prepares case studies of its work when the project results in a particularly valuable outcome or highlights an especially interesting discovery. The Project Lead prepares the case study, as this person has most likely had the most client contact and been responsible for the majority of the study design, moderation, and analysis. The case study consists of the background and challenge, objectives, methodology, results, and what was accomplished with the insights.

For ISBE, case studies will include interviewing personnel at the districts identified with the highest degree of ILS implementation. These interviews will be video recorded and edited into highlight clips and vignettes that will be used to illustrate how the ILS can be successfully implemented.

Affect regularly video records the focus groups and in-depth interviews it conducts. Certain clients prefer to have their reports and presentation decks supplemented by video excerpts of the participants’ comments. Instead of merely inserting verbatim quotes into a report, the video clips bring the Voice of the Customer directly to the client.

It is important to consider the final output when beginning the process. Moderators need to work with the film crew so that the best possible video can be captured. This means framing questions so that participants respond...
without the moderator’s question needing to be included for context. The moderator also needs to take care not to talk over the end of participant’s comment. The film crew and moderator must work together, communicating subtly during the interview in order to make sure both parties are getting what they need without compromising the interview itself.

Once the footage is hot, it needs to be transcribed in a way that the comments are synched up to time code. Next, the analyst goes through the transcripts and identifies the ideal clips for the videos. The editor then splices the desired segments into the rough cut of the video. After the analyst confirms or adjusts the different clips, the final editing takes place.

The final videos and vignettes can be imbedded into reports, posted on an FTP site, or presented to interested parties in DVD. Aeffect can even develop a microsite dedicated to the particular subject, so that visitors can easily access the video material, however, we have not included this in our cost estimate. Deliverables 4 and 5 are described below:

**Deliverable 4 (Jul 1, 2015 – Jun 30, 2016):**
- Analyze interview and focus group data
- Write case studies/vignettes, as well as create and edit video clips

- Edit video clips
- Disseminate findings
### Timeline for the evaluation (25 pts)

Aeffect recommends the following timeline for the evaluation, however, we are open to adjusting the timeline pending ISBE’s needs (to be discussed post award). Our tentative timeline is shown below:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project award and kick-off meeting in Springfield</td>
<td>November 1 2014</td>
</tr>
<tr>
<td>In-depth Interviews with 20 Stakeholders</td>
<td>November 2014</td>
</tr>
<tr>
<td>Secondary Research to Identify State Rubrics</td>
<td>November 2014</td>
</tr>
<tr>
<td><strong>Year-end Report #1 – Stakeholder In-depth Interviews, Secondary research, draft rubric, Draft Survey, Sampling Plan and Interview schedule for 2015</strong></td>
<td>December 2014</td>
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<tr>
<td>Review and refine questionnaire with ISBE</td>
<td>January 2015</td>
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<tr>
<td>Build and establish survey sample</td>
<td>January 2015</td>
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<tr>
<td>Program survey</td>
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<tr>
<td>Distribute survey and collect data</td>
<td>February-March 2015</td>
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<tr>
<td>Process/tabulate/score districts/enter data</td>
<td>April 2015</td>
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<tr>
<td>Statistical analysis of data</td>
<td>April 2015</td>
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<td><strong>Year-end Report #2 – Quantitative Research</strong></td>
<td>June 2015</td>
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<tr>
<td>Develop screening questionnaire and focus group guide</td>
<td>April 2015</td>
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<tr>
<td>Recruit focus group participants</td>
<td>April 2015</td>
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<tr>
<td>Conduct 30 focus groups with district personnel</td>
<td>May-June 2015</td>
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<tr>
<td>Transcribe and perform content analysis for focus groups</td>
<td>July 2015</td>
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<tr>
<td>Submit draft of focus group report</td>
<td>November 2015</td>
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<tr>
<td>Revise report based on ISBE feedback</td>
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<td><strong>Year-end Report #3 – Qualitative Research</strong></td>
<td>Jan - Feb 2016</td>
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<tr>
<td>Select respondents from focus groups for case studies</td>
<td>January 2016</td>
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<tr>
<td>Confirm participation of case study participants</td>
<td>February 2016</td>
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<tr>
<td>Write case studies for web and video</td>
<td>Feb – Mar 2016</td>
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<tr>
<td>Film video clips at their schools</td>
<td>April – June 2016</td>
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<td>Edit video clips</td>
<td>July – Aug 2016</td>
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<td>Disseminate findings</td>
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<tr>
<td><strong>Final Report – Comprehensive Evaluation Report</strong></td>
<td>Before July 2017</td>
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Prior and Demonstrated Experience (D4.1)

Case Study 1: Evaluation of College Illinois’ Market Potential

College Illinois is a 529 Prepaid Tuition Program offered through the State of Illinois. Aefect was contracted to perform an evaluation of College Illinois’ market potential within the state. Aefect conducted an online survey using a stratified random sample of Illinois households, specifically surveying parents who have children in specific elementary and middle school grades.

In order to determine College Illinois’ market potential, Aefect first designed and established a rubric that would be used to guide interpretation of findings, specifically leading to an assessment of whether College Illinois had high, moderate, or weak market potential. Specifically, we set guidelines related to the anticipated percentage of the target audience who already had a 529 prepaid plan versus another savings plan, consumers’ awareness and impressions of 529 plans/College Illinois, barriers to purchasing a plan among those aware of College Illinois, intentions to purchase a 529 plan, and perceptions of College Illinois and competitors.

Employing the initial rubric, Aefect then designed, programmed, and implemented an online survey of approximately 600 parents with children of specific ages, and in several different income and age brackets. The survey included custom questions built around rubric metrics and examined parental intent/investment plans for their children’s education, behaviors/actions they had already taken for college savings, and channels where they might engage to hear about savings programs, etc.

After collecting the data, Aefect tabulated the data, analyzed it, and reported the survey findings. Based upon the analysis, Aefect proposed several recommendations for College Illinois. Ultimately, the target audience was interested in investing in their children’s future college plans, but most did not own 529 prepaid tuition plans. This was not because consumers hadn’t heard of 529 plans, however, but rather because there was confusion about the benefits derived from these plans.

Aefect ultimately recommended communications strategies that more clearly addressed the definition of College Illinois and highlighted specific benefits parents would realize from purchasing a pre-paid tuition contract. Given that a current barrier was identified, we were able to indicate that market potential would escalate if specific messages were sent to parents helping them understand specific benefits. We were able to identify the proportion of interested parents who would likely be receptive if the barrier could be surpassed, hence targeting improved future market potential.
Case Study 2: Evaluation of State of Illinois Gaming for Illinois Lottery

As one of the most progressive lotteries in the country, Illinois Lottery is the first lottery in the nation to sell tickets online, allow ticket purchases via a mobile app, and employ a private manager for business management. In 2013, Aeffect was selected as the research firm to manage the Lottery’s $2 million annual research contract. For Illinois Lottery, and for many lotteries across the country, understanding how they can be more competitive is critical, given that dollars they generate are treated as state revenue and funneled into education and other state programs.

Given these challenges, Aeffect was asked by the Illinois Lottery to design and conduct its first-ever evaluation of the competitive gaming landscape. Critical to this study was the ability to balance respondent quotas using a stratified random sample of Illinois households and to also acquire a sample that could be projected to and representative of the entire State, given potential scrutiny from State legislators and industry observers. Because the study would have high visibility and its findings reported across gaming entities, the data collection process needed to be exacting and tightly controlled.

Aeffect conducted a multi-mode competitive landscape survey of 4,000 residents in the State of Illinois, using a blended survey executed through computer-aided telephone interviewing and Internet-based data collection. A blended sample (including cell phone sample) was balanced to match US Census regional data for such demographic dimensions as age, gender, ethnicity, and income. The survey was conducted both in English and in Spanish, given the growing number of individuals in Illinois who speak Spanish. By offering people the opportunity to take the survey in English and in Spanish, we were able to achieve a higher rate of response, ensuring our survey was again representative of the population.

Aeffect designed the survey, programmed the questionnaire, collected and processed the data, and analyzed and reported the information helping the Lottery understand and view its competition from a new perspective, showing, for example, that the lottery has a much broader appeal than horse track wagering, or that online gaming, though still illegal, is an emerging form of competition to be considered and monitored. By understanding the statewide gaming behaviors, the Lottery is better able to manage its offerings relative to the competition and to help legislators understand the growing competition it faces, demonstrating why certain investments are needed to maintain its competitive edge in the market.

In order to help Lottery disseminate and communicate study findings to varied audiences, Aeffect helped Lottery prepare a legislative brief that was shared with interested State Legislators and other stakeholders, and crafted presentations for Lottery leadership to share at conferences, industry trade groups meetings, and training events. Aeffect also prepared data code books and files so that the dataset could be offered to others who might find the data useful and meaningful, such as the chief economist for the State of Illinois, media, and select university professors. Aeffect also developed news releases that featured specific stories created from the data that were shared with media relations staff in Governor Pat Quinn’s office to enable coverage of the new learning.
Case Study 3: Evaluation of New Attractions with Video Case Studies for Brookfield Zoo

In order to draw more visitors from within the State of Illinois to Brookfield Zoo, the Chicago Zoological Society turned to long-term research partner, Affect, Inc., to conduct an evaluation of new, alternative attraction concepts that the zoo was considering. Affect worked with Brookfield Zoo to conduct qualitative research that would evaluate new attraction concepts. In order to help the organization embrace and extend learning from the research, Chicago Zoological Society requested that Affect develop supplemental video case studies featuring video clips that summarized focus group reactions.

Affect identified storylines/themes for the video, crafted copy and selected video clips. We then worked with a video editor to assemble time coded clips into highlight reels that were then imbedded into a MS powerpoint presentation document and released on an internal website. This approach brought the results of the research alive for the executives of the organization, who then used the insights to determine how proceed with new implementations.

Affect regularly video records focus groups and in-depth interviews that it conducts. Certain clients prefer to have their reports and presentation decks supplemented by video excerpts of the participants’ comments. Instead of merely inserting verbatim quotes into a report, the video clips bring the Voice of the Customer directly to the client. We are experienced in creating video case studies, video reports, and work with specific clients (e.g. NorthShore Health System) to create advertising that features vignettes of people telling stories which come directly from research insights.
OFFERER/STAFF QUALIFICATIONS (200 pts)

Prior and Demonstrated Experience (D4.1)

Flexibility, Efficiency and Scalability Due to Aeefect’s Size and Nature of Business

For organizations involved in marketing research and evaluation services, life is often busy, fast-paced, and subject to change. Programs and their implementation rarely proceeds without some sort of hitch, which often requires that schedules be re-adjusted to accommodate a broad range of uncontrollable factors. Many large research firms and other vendors do not understand this environment, nor do they see a particular need to cater to it. In fact, many adhere to standard procedures and timelines that allow for work to proceed at a steady and routine pace. In essence, program development is delayed or held back by such a research process, and/or in some cases, decisions to move forward are made without the benefit of research information. This “fly-by-the-seat of your pants” approach to program development carries potential risks and does not ensure a truly integrated approach is followed-- that is, leveraging insights from target audiences into effective programs.

At Aeffect, however, we have created an alternative environment where flexibility, efficiency, and scalability are inherent in our culture. We have developed capabilities and standard protocols that allow us to flex our staff to accommodate client research needs more quickly, and to deliver interim reports that complement and support ongoing program development and refinement efforts. In essence, we allow research to complement the program development process rather than to slow it down. Many clients are initially amazed by our ability to scale to match their needs, whether that be conducting a few focus groups next Monday, or launching a quantitative survey in ten countries to get raw data frequencies back by end of next week. While we recognize that there are often some sacrifices made in expedited initiatives, we are careful to advise our clients of both the risks and rewards associated with expedited efforts. Oftentimes, they decide that the benefits of expediting the research process outweigh the risks associated with waiting another month for a detailed report or simply proceeding without it. Aeffect will match your pace and complement your program development process with its customized approach to research and evaluation.

Tapping Aeffect Resources for ISBE

In helping ISBE address evaluation and implementation-related issues, Aeffect will draw upon the experience its consultants have gained from past assignments to help them address questions and issues just like these. We will work closely with the appropriate members of the ISBE team to determine how to best address the questions at hand, often recommending approaches we’ve used before or identifying creative, original research approaches to address new questions.

In some cases, we may be able to address the question at hand by tapping existing resources, such as literature review, or searching our own research library. Our vast experience with literature reviews will be invaluable when exploring how other states have evaluated their implementation of educational standards.

Enabling Learning Through Custom Research

In designing custom research, it is first important to identify what information is needed and how it will be used or applied. In some phases of this project, the research will need to be exploratory, discovering new insights about one of the various key audiences and/or helping us learn in an unstructured way. In these scenarios, Aeffect will be most likely to recommend qualitative research in order to address research objectives.
• For qualitative research, our consultants may recommend focus groups, telephone focus groups, online chats, bulletin boards, in-depth interviews, triads, dyads, or one-on-one interviews.

• If greater depth is required, they may recommend immersions; in-school interviews; online communities or diaries; photo journals; or ethnography to achieve greater depth through observation.

On the other hand, if it is important to quantify, confirm, or extend new information to a larger population (which is the case for the survey phase of this engagement), then Aeffect consultants will typically recommend quantitative research.

• For quantitative research, our consultants may recommend surveys executed by Internet (online), CATI (computer aided telephone interviews), CAPI (computer aided personal interviews), mail, hand-held unit, paper-based, or in-person surveys. We have developed proficiencies for gathering data using varied methodologies.

D4.2 Offerer’s Qualifications

Relevant Management Experience Managing Research and Evaluation (40 pts)
For over 15 years, Aeffect, Inc. has refined and adjusted quantitative research methods and educated industry about these methods. Aeffect consultants are frequently asked to serve on industry committees that set standards for field data collection and analytic methods, and to demonstrate “best practices” in quantitative research at industry conferences. Aeffect’s ability to guide industry and assume a leadership role in quantitative communications research has evolved through extensive hands-on experience helping leading organizations conduct research to inform decisions, confirm directions, isolate opportunities, and understand the magnitude of potential problems.

Aeffect researchers have conducted quantitative research to help organizations facing diverse communications challenges, such as those seeking to achieve a specific objective, evaluate the progress of internal and external programs, change behaviors, elicit specific attitudes or perceptions, or simply sell a specific product or service. Aeffect’s quantitative research has helped to clarify situations, quantify opportunities, reveal the magnitude of problems, and help to measure and track attitudinal or behavioral changes over time.

Aeffect Approaches to Quantitative Research
Quantitative research is used to confirm understanding, to inform decision-making, and to increase confidence in decisions an organization must make. When assisting organizations with survey development, implementation, and quantitative analysis, Aeffect has helped our clients evaluate the effectiveness of specific programs or initiatives and identify best industry practices for adoption. Our quantitative projects have also helped out clients compare perspectives of various target audience subgroups, prioritize target audiences for communications initiatives, define individuals’ propensity or readiness to change, identify drivers and barriers to adoption, measure receptiveness or reactions to proposed changes or concepts, rank messages on their ability to influence or deliver desired outcomes, and establish a hierarchy for various factors that influence how consumers (or educators) will behave or respond in the future.
As a result of the type of research objectives Aeffect typically addresses, nearly all of the quantitative research conducted by our company is “custom” in nature, meaning that each survey is done for one organization with a specific purpose or objective in mind. In “custom” research, every survey evolves from a unique set of research objectives defined through close and frequent conversation with survey sponsors. In contrast, our company does not conduct or provide “syndicated” research, in which surveys are performed and data offered to multiple organizations for use or purchase at a set fee. As a result, Aeffect researchers are continually challenged to listen to their clients and they survey, design measures to address research objectives, and ensure measures are crafted in a way that is meaningful to the audiences they survey.

Because Aeffect focuses exclusively on “custom” research, our researchers, build extensive experience over time developing and designing surveys to achieve a broad array of client interests. Even though our research firm may be smaller, we have broader exposure to and experience in different measurement approaches used in survey development. This difference becomes most apparent when a client asks: “How have other organizations with this same interest designed research for this purpose?” or “How do other organizations ask questions about ….?”. New clients who come to Aeffect after having worked with the type of research firms described above often say Aeffect researchers have stronger survey development skills and are better able to help them understand how to leverage “best practices” in survey development.

The type of survey used often dictates the type of measures which can be used and the way in which questions must be structured. For example, in omnibus surveys, questions need to be short, simplistic and general in nature, given they will be administered in a long battery of other unrelated questions submitted by other organizations. In benchmark and post-exposure surveys, there is generally a need to ensure that questions are asked consistently and in a manner that will transcend time and allow for comparisons to be made from wave-to-wave.

Aeffect Approaches to Implementation/Data Collection

Aeffect listens intently to client information needs before making recommendations on the best ways to collect data. For example, if a longer survey is required, online data collection may not be wise given early termination of the survey when respondents experience survey fatigue. Alternatively, a telephone survey might be encouraged, given the fact that a live interviewer can encourage respondents to complete the entire survey and questions can be rotated to ensure fresh responses. If a short survey can be used, however, methods such as online or IVR may be suggested, given that they are more expedient and cost efficient. In some situations, multiple methods may be used to make survey participation more convenient for participants, and hence elevate response rates. In other situations, only one method may be suitable given its ability to reach and engage a specific type of target audience. These types of considerations are generally discussed by Aeffect researchers and presented to our clients upon submission of our implementation plan.

**TYPES OF SURVEYS USED BY AEFECT**

- Point-in-time and follow-up surveys
- Omnibus surveys
- Continuous tracking surveys
- Pre- (benchmark) and post-exposure surveys
- Test and control market surveys
- Longitudinal surveys
- National and global surveys
- Cross-sectional and geo-demographic surveys
Survey/Data Collection Methods Used by Aeffect

- Computer-aided Telephone Interviewing (CATI) Random Digit Dialing or Targeted List Sample
- Toll-free Interactive Voice Response (IVR) Automated Phone surveys using hotlines
- Computer-aided (Palm or PC-based) surveys
- Personal Interview (CAPI) surveys
- Web or Online surveys
- Mail surveys
- Teleform surveys
- Fax-back surveys
- Onsite or mall surveys
- Point-of-service service surveys
- Panel surveys
- Kiosk self-administered surveys

Conducting large scale evaluations, particularly previous evaluations that addressed educational initiatives or entities

Aeffect has extensive experience with development and administration of large databases containing millions of records for both corporate and government clients. In the government arena, Aeffect has also worked with CMS and CDC in handling sensitive health or medically-related databases that require the strictest guidelines and protocols to ensure respondent confidentiality and privacy. Most recently, Aeffect was selected as the first-ever marketing research partner to be granted access to CMS’ administrative database of over 40 million Medicare beneficiaries. Aeffect utilized the database to pull nationally representative sample for a telephone study of target populations. This required clearly defining the parameters including respondent specifications, randomized selection of records, and file transfer protocols. Aeffect also routinely establishes secure password-protected file transfer protocol (FTP) sites for transferring sensitive data to and from clients.

On another corporate project, a national restaurant chain asked Aeffect to create and manage a customer database of several million records. To obtain the data, Aeffect worked with the client to define the necessary fields and then captured and stored all sales receipts across 40 store locations for a one week period. Aeffect then imported the resulting data into a database that was ultimately appended with PRIZM data and used to develop a custom segmentation.

In terms of software, Aeffect utilizes SPSS, Sawtooth, and SAS statistical software packages to build databases of quantitative data, and MS Access to store and access respondent level data. For online surveys, data is hosted on our internal web servers and then immediately transferred into administrative databases.

Development of Focus Group protocol and interview questions

Review of Aeffect’s Expertise in Qualitative Research

Over the past decade, Aeffect, Inc. has developed innovative qualitative methods for communications research and educated our industry on these methods to strengthen research capacity globally. Recognized as a worldwide leader in qualitative methods for communications research, Aeffect consultants are frequently asked to serve on industry committees that set standards for qualitative research, and to demonstrate “best practices” in qualitative research at industry conferences. For example, Aeffect qualitative research specialists have collaborated on the development of Ethics and Standards for Qualitative Research, a guidebook issued by the
Qualitative Research Consultants Association (QRCA) and used by thousands of qualitative researchers worldwide.

Affect’s ability to guide industry and assume a leadership role in qualitative research methods has evolved through extensive hands-on experience helping leading organizations conduct research to inform message development, refine message execution, and improve communications efficacy over time. In particular, our researchers have served on the Advertising Research Foundation (ARF) Councils for Qualitative Research, establishing protocols for research; trained hundreds of corporate and government researchers in the use of qualitative methods; and developed unique qualitative research methods (e.g., mind mapping, hot buttons analysis, etc.) that are now widely used in the research industry. Through work with our clients, we have also adapted qualitative research methods for use with diverse target audiences, ranging from youth to seniors, from consumers with lower to higher socio-economic status (SES), and from consumers to professionals. Finally, Affect has also executed qualitative research in many different countries, languages, and cultures.

<table>
<thead>
<tr>
<th>Target Audiences Interviewed by Affect</th>
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<tbody>
<tr>
<td>Adults/Parents (By Gender, Age, Income, etc.)</td>
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<tr>
<td>Adults Representing Ethnic Markets (African American, Hispanic (acculturated and non-acculturated), Asian/Pacific, Native Americans)</td>
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<tr>
<td>Teens, Tweens, and Teen Influencers</td>
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<tr>
<td>Young Adults (18-24, 25-34)</td>
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<tr>
<td>Influencers (Teachers, Clergy, Coaches, Grandparents)</td>
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<tr>
<td>Teachers, Principals, and School Administrators</td>
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<tr>
<td>Market Segments (By Geo-demographic, Behavioral, Attitudinal, etc.)</td>
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<tr>
<td>Employees, Staff, Managers and Directors</td>
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<tr>
<td>Congressional Leaders and Stakeholders</td>
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<tr>
<td>State and Local Partners (Program Directors, Community Leaders)</td>
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<tr>
<td>Other Partners (Associations, Organizations, Community-based Organizations, etc.)</td>
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</table>

Affect researchers conduct qualitative research to help organizations facing diverse communications challenges, such as those seeking to achieve a social objective, change behaviors, elicit specific attitudes or perceptions, or simply sell a specific product or service.

Affect employs a broad range of qualitative research approaches with target audiences, shown below.

QUALITATIVE DATA COLLECTION METHODS USED BY AFFECT

- Individual In-depth Interviews (one-on-ones)
- Dyad or Triad In-depth Interviews
- Mini-Focus Groups (5-6 participants)
- Traditional Focus Groups (8-9 participants)
- Telephone Focus Groups
- Tele-Web Focus Groups with online exposure to concepts or communications materials
- Qualitative/Quantitative Data Collection Sessions with Moment-to-Moment Technology
- Usability or Site Navigational Interviews with Picture-in-Picture Technology
- Consumer Immersion (Observational interviews)
**Affect Approaches to Formative Research**

Formative research is used to gather information that will establish a foundation for strategic planning and communications development. This often means gaining a deeper understanding of the target audience, crafting logic models, and gathering insight into the topic at hand.

Affect qualitative researchers utilize a variety of standard techniques to manage group dynamics and minimize the effects of group bias in sessions, such as use of interventions to change course of discussion, paper and pencil exercises, shifts in eye contact, etc. They have also created advanced or innovative methods to explore the effectiveness of communications products. The application of advanced qualitative research techniques allows Affect researchers to gather in-depth insight into what works, what doesn’t and why.

In particular, we frequently use such qualitative approaches as projective techniques, sentence completion, storytelling, and mind mapping to ascertain and understand the target’s reactions to proposed copy. Ultimately, we seek to help our clients learn how information motivates consumers to engage in desired behaviors, and how well and consistently intended messages are being conveyed.

The Project Director and AD/Task Order Leader will collectively prepare a screening questionnaire, quota reporting sheets, field instructions, and project information sheets for ISBE (with dates, group times, etc.). After these materials are refined and approved by IBES, Affect’s Data Collection Manager/Field Supervisor will distribute materials to suppliers of telecommunications or recruiting services.

Affect will subcontract local recruiting firms that it has successfully utilized in the past to recruit participants. Affect has extensive experience managing the work of subcontractors and supervising hundreds of recruiting firms throughout the country. Our staff keeps an ongoing database with ratings of facility performance to aid in future selection. As a result of these experiences, we will be able to ensure that facilities adhere to high standards for respondent recruitment. Each company selected to recruit respondents will be required to have interviewers who are closely supervised by a field manager. They will be asked to recruit 10 respondents per group for 6-8 using the lists provided by ISBE.

Once a schedule of focus groups has been selected, Affect’s AD/Task Order Leader will send ISBE a confirmation of this information in a summary memorandum. Once respondent recruitment has begun, results of local recruitment efforts will be summarized by the facility on recruitment grids provided by Affect. The grids will be completed and sent to Affect on a daily basis to allow for detailed and up-to-date monitoring of field progress. Not only does this allow us to ensure that selected respondents are qualified to participate in the research, but it also allows us to provide our clients with up-to-date electronic quota reports on a bi-weekly basis.

Prior to the groups, Affect’s AD/Task Order Leader will develop a draft discussion guide for review with ISBE. The guide will be in outline form, numerically identifying key discussion topics, specific questions to be asked, key areas to be probed during the group by the moderator, and as appropriate, special instructions to be shared with participants. The discussion guide(s) will typically cover a 1½ hour focus group period. Additionally, each discussion topic will be assigned discussion time in minutes, to help achieve consensus on how group discussion topics will be prioritized. As multiple target audiences are to be included (administrators vs. teachers), then multiple discussion guides will be prepared by Affect.
The Aeffect AD/Task Order Leader assigned to the project will also typically fulfill the role of focus group moderator, except for groups that require an ethnic research specialist. Aeffect staff members have been professionally trained in focus group moderation at either the RIVA or Greeley Institutes, and have conducted hundreds and even thousands of focus groups. They would design and apply a variety of qualitative research techniques and exercises for each project to ensure insights are gathered. Upon completion of the focus groups, Aeffect would transcribe audiotapes and perform content analysis of the resulting data. A research analyst would look for common discussion themes and patterns that exist in reactions to and impressions of the creative materials. If many groups are conducted on a project or topics are highly detailed, we use computer-aided processes for verbatim analysis, such as EZ Text or proprietary content analyses software developed by our company. This allows for common themes to be identified, counted, and profiled in the analysis.

Analysis, interpretation, and aggregation of quantitative and qualitative data

Data analysis and interpretation

After data collection is complete, Aeffect utilizes a variety of basic and advanced methods for data analysis and interpretation. This analysis and interpretation will take many different forms. For example, in qualitative research, we may be charged with analyzing focus group or interview transcripts, coding verbatim comments, and performing a content analysis that leads to identification of discussion themes. This will allow for identification of similarities or differences between various respondent subgroups. Aeffect has developed a custom software application to facilitate this process. This application significantly reduces the labor effort and cost typically associated with content analysis for qualitative research.

When interpreting survey or quantitative data, Aeffect typically performs data analysis using univariate and multivariate statistics.

- Aeffect utilizes univariate statistical approaches to summarize and describe data output, such as presenting frequencies, descriptive statistics, and z- and t-testing of mean or proportions for statistically significant differences. This helps us profile the data on a basic level for users, while examining concentrations within the data and similarities or differences between subgroups. Typically, univariate statistics are automatically processed and displayed on Aeffect data tables, so all research analysts need to do is review and summarize them for our clients.

- Aeffect utilizes multivariate statistical approaches, such as factor analysis, multiple regression, multiple discriminant analysis, cluster analysis, CHAID, conjoint analysis, maximum difference analysis, multivariate analysis of variance and covariance, structural equation modeling, etc. to examine underlying relationships in the data which helps us understand data on a deeper level. Typically, in communications research we are looking to identify how communications exposure or message reception (as evidenced through knowledge, attitudes, or perceptions) influence specific outcomes or behaviors.

For example, below is a pathways model Aeffect created to help CDC understand how a new advertising campaign to promote HIV testing could be used to influence behavior. In this diagram, we see that attitudes toward testing, being within an at-risk group, and/or having knowledge about testing are most directly predictive of the outcome. Additionally, we can also observe that specific demographic and behavior measures also form pathways that move individuals closer to knowing their HIV test status. Since many basic demographic variables are also likely to be measured at an ordinal level, our analysis typically uses the WLS method on the polychoric polyserial correlations, along with an asymptomatic covariance matrix.
Aeffect could conduct SEM analysis for ISBE in order to identify pathways that predict positive attitudes toward implementation.

If there is a pathway, we would then identify what measures fall in between the earlier stages and the outcome, helping us understand what specific ideas or messages need to be emphasized in order to facilitate the desired outcome. SEM analysis may also allow us to reduce the length of ISBE surveys by identifying the measures that lead to implementation.

Aeffect runs all multivariate analyses using a statistical software programs such as SPSS, SAS, and Sawtooth. PhD-level staff are available to confirm or supervise use and application of advanced analytics. Results of the analysis are provided in graphs/charts and placed in an easy-to-read report format in MS Word or MS PowerPoint. A detailed analysis of the results will also be provided in the report, and all data will be provided to ISBE in the preferred format.

Modeling
Given that statistical modeling has already been described above, Aeffect will discuss other relevant forms of modeling we perform in the field of communications research, including logic modeling and return-on-investment modeling. The development of custom models for evaluation is a strength for our company.

**Development of Logic Models to Guide Campaign Evaluation**

In some cases, Aeffect evaluations are simplistic, evaluating the effect of one component on one target audience. In other cases, our evaluations are more complex, evaluating the effects of multidisciplinary programs that serve multiple targets, in multiple languages, and deliver messaging across multiple mediums. Regardless of
complexity of these challenges, Aeffect examines the extent to which campaigns achieve, exceed, or fall short of meeting their intended objectives.

As a result, Aeffect’s first step in evaluating communication campaigns is to design a logic model. A logic model establishes how a communication initiative will be implemented and what impact or effect it will influence. In essence, a logic model serves as the foundation for all communication evaluation, data analysis, and interpretation activities.

Aeffect logic models typically include four primary elements (inputs, activities, outputs, and outcomes).

**COMPONENTS IN AEFFECT LOGIC MODELS FOR PROGRAM EVALUATION**

- **Inputs** are resources that the ISBE will dedicate to implementation of the ILS. Inputs will vary depending on how the ILS are intended to be implemented. Inputs could include direction, expertise, and funding.

- **Activities** include those things ISBE will do as part of its implementation effort, such as education, support materials, meetings, and anything else that is undertaken to communicate the message about ILS implementation.

- **Outputs** are direct products of the activities that are generally quantifiable and provide evidence of the scope of service(s) invested. Outputs may include the rubric developed for assessing progress, measurement of implementation, determination of progress, etc.

- **Outcomes** can be described as benefits or changes experienced by target audiences a campaign is intended to influence. Outcomes are usually expressed in terms of changes to people’s knowledge, attitudes, perceptions, consideration, or behaviors. Outcomes are also generally further divided according to when we might be able to observe changes, in the short-term, intermediate, and longer-term. For example, a short-term outcome might simply be increasing awareness, while a longer-term outcome might be actual advanced implementation of the ILS.
STATISTICAL APPROACHES USED BY AEFFECT

♦ **Uni-variate statistics** allow researchers to profile information and draw reasonable conclusions about similarities and differences in a dataset. Aeffect uses uni-variate statistics, such as frequencies, means, standard deviations, etc., to help our clients understand the basics about their target audiences, including their wants, needs, perceptions, and attitudes. We utilize such comparative approaches such as testing of subgroup means or proportions for significant differences to allow for comparisons between subgroups. Differences between subgroups can dictate a need for different or varied approaches in program design, interventions, or communication practices.

♦ **Multi-variate statistics** allow researchers to examine relationships in data, understanding how one factor may affect or influence another. Aeffect uses basic multi-variate statistics, such correlation and factor analyses to improve efficiency of the analysis process, identifying how variables may measure similar or different dimensions. Similarly, we use statistical approaches such as regression and CHAID analyses to understand what characteristics are predictive of a consumer’s behavior, and hence influential in the future. We utilize classification statistics, such as cluster and discriminant analyses, to examine and explore what dimensions can help differentiate one group of consumers from another. By applying such analytics, we are better able to help our clients ask the right questions, of the right people, and apply findings in a way that will achieve the right results.

♦ **Structural equation modeling** allows researchers to reveal the influencing factors that lead to an individual’s behavior. It creates a hierarchy in the importance of these factors in achieving desired outcomes. Aeffect uses SEM to explore the relative influence of interventions and communications campaigns in influencing a desired outcome. By demonstrating the relative importance of exposure to a campaign in stimulating knowledge, and then driving behavior, we are better able to help our clients justify investment in communications programs.

♦ **Perceptual mapping** allows researchers to portray data relationship in a way that allows them to be understood by non-researchers. Perceptual mapping is often useful in showing how different groups of consumers perceive the various services an organization offers, and/or how different groups of consumers perceive the same organization.

♦ **Logit analysis** allows researchers to understand relative strengths and weaknesses associated with a particular message, concept, or entity compared to others that might be used. This analysis is particularly useful in situations where an entity may be endorsed favorably on all characteristics simply because it is well known. The analysis flushes out high and low familiarity effects to deliver insights on each entities own strengths and weaknesses compared to expectations.

Aeffect will provide recommendations to ISBE regarding implementation strategy and materials. Aeffect consultants have developed the ability to provide strategic marketing planning and advertising development counsel in a highly diplomatic fashion. We are able to find ways to help people strongly ingrained in a specific direction understand a need to consider an alternative direction, supported not by what we think, but rather by what the target audience wants and needs.
Aeffect consultants position their role as an objective and independent connection to our clients’ target audiences. In doing so, we act as an advocate for our clients’ target audiences, and represent their points-of-view and reactions during the implementation process. We channel quantitative data and qualitative insights into the marketing and communications planning process, representing target audience perspectives and evidence-based reasoning on how to maximize opportunities and reduce barriers.

Proposed Aeffect team members have managed research and evaluation services in different environments (client-side, in agency, and in consulting environments). As a result, they have developed a high degree of sensitivity to how to position information in a way that can make others more receptive to the information. If bad or unfavorable results are revealed, we know how to position such information as ‘an opportunity to understand how we can do better’, and or as ‘good insights on how we can strengthen our communications and target audience relationships.’ When positive results are received, we know how to temper the findings to encourage everyone to not only embrace positive feedback, but also to recognize continued opportunity for maintaining that same strong record of success moving forward.

**Demonstrate requisite skills, resources and personnel to collection, clean, and analyze data while also keeping it secure**

Aeffect would leverage existing lists of district and school personnel and would closely supervise data collection efforts conducted for ISBE by subcontracted CATI centers or via online surveys. We require that all telephone interviewers complete a rigid training program and achieve at least one year of experience interviewing on other types of studies before they are assigned to selected recruiting projects. After briefing, the interviewers are closely monitored by a Field Supervisor. Normal quality control procedures require that at least 10% of all interviewers’ work on each project be monitored by Field Supervisors and at least 10% is validated by telephone checks. Clients are always welcome to personally monitor and check fieldwork quality. Aeffect would conduct the field briefing on site at the dialing center, and then monitor interviews remotely on an ongoing basis. We would invite ISBE staff to monitor remotely as well, especially when a survey launches.

In addition to these general procedures, Aeffect will utilize a wide variety of quality control measures in order to ensure data integrity. These protocols include managing each interviewer’s overall contribution to the study, balancing interviewer workload to ensure interviewers complete equivalent portions of the interviews, utilizing a ratio of no more than five interviewers to one Field Supervisor, utilizing the same supervisors on an ongoing basis, training all interviewers with a consistent training program, controlling sample distribution and call back procedures electronically to ensure proper sample management and random selection of sample records, and monitoring call distribution reports on a daily basis.

Aeffect Project Directors and Account Directors will prepare a written research plan for the quantitative phase. The research plan typically profiles all project details, such as background, objectives, study design, data collection approach, sampling frame, quotas, recruitment specifications, etc. No research will be conducted until the research plan is approved by ISBE.

Affect’s Account Director will then launch field data collection processes. If not completed earlier, a pre-test of the questionnaire will be administered in order to ensure its efficacy, clarity, logic, etc. Aeffect will adjust the instrument, if necessary, and advise ISBE of required changes. When the final survey is field ready, Aeffect will monitor fieldwork closely, providing ISBE with periodic data collection progress reports.
Once data is collected, Affect’s Account Director will discuss tabulation plans with ISBE, collectively selecting relevant subgroups by which the data will be cut (e.g., grade levels, geographic location, socio-economic dimensions). Data tabulations will then be programmed and processed by an Affect Data/Statistical Processor. For a standard survey composed primarily of close-ended questions, data tabulation typically takes 1-2 days. For surveys that also include open-ended questions, the process is extended by the length of time needed to develop code lists for these questions, assign codes to respondent answers, and enter these codes into the computer by hand. In most cases, data tabulations are completed in one to two weeks.

Affect typically conducts a “soft” launch of surveys on the first day of data collection by limiting the initial number of surveys conducted (typically 10 percent of the quota or less). This allows for further tracking and observation of any issues identified by programmers, account staff, or quality control managers. Affect also monitors all data collection and quotas on an ongoing basis in real time. After the initial soft launch is complete, if there are no other issues or problems, a “hard” launch is commenced immediately. During data collection, Affect monitors all cell quotas on a daily basis to ensure that targets are being met.

As for security, Affect’s infrastructure utilizes a multi-tiered firewall strategy. The tiered firewall structure secures the Web infrastructure from the Internet and from Affect’s production environment. Securing Affect’s perimeter is a packet filtering router and a firewall, which encompasses a demilitarized zone (DMZ). Affect’s corporate policy dictates that all Web servers must be located within this DMZ. All unnecessary ports and protocols on Web servers remain disabled to enhance security. Additionally, all Web infrastructure servers require full security logging as mandated by corporate policy. Data generated by Web-based applications or Web surveys never resides on Affect Web servers within the DMZ. This encrypted data immediately flows from the Web server through the tiered firewalls to the secured database server. A second tier firewall separates the DMZ from the Web application servers and the database server. The second tier firewall also segregates the Web databases from Affect’s production environment.

**Personnel qualifications** (40 pts)

Following are brief descriptions of the Key Personnel and Support Personnel who will be assigned to this task order and the roles they will play.

**Project Directors (2):**

**Michelle Kuhn, MS - President**
**Jed Lam, MS – Senior Vice President**

Michelle and Jed will work closely with ISBE on research design and will lead all aspects of the research task order. In this role, they will be responsible for ensuring ISBE’s satisfaction with the research, guiding all analysis and interpretation of research conducted under the contract. They will manage and assign all resources for the task order, approve deliverables, present findings, and supervise the monthly reporting/public vouchersing process for the task order. They will also be responsible for setting study protocols and standards, developing the work plan, sampling plan, data analysis and banner plans, and guiding analyses. Michelle has a MS in Communication from Northwestern University and is a seasoned researcher with over 20 years of experience. Jed has a Master of Science in IMC from Northwestern University with a specialty in Database, Direct and Electronic technology. He has been with Affect for 14 years. Both are seasoned in leading qualitative and quantitative research engagements, and have done so for federal and state governments.

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Senior Research Directors (2):

Tamara O'Shaughnessy, MS – Vice President, Account Services
Wayne Eischen, MS – Vice President, Account Services

Tamara and Wayne will work closely with ISBE as Research Directors for this project. Both have been with Affect for over 10 years and assisted a broad range of clients with similar research challenges. In these capacities, they will supervise tasks necessary to complete secondary and primary qualitative and quantitative research. They will coordinate meetings; collect and document SBE input; develop and refine research materials, such as screeners and questionnaires; provide direction to research analysts and field/data collection personnel; request and specify tabulations and statistical output; and prepare/assemble research deliverables, such as topline and summary reports.

Tamara will lead the foundational research, primarily in the secondary research/literature review. She is well qualified for this challenge, having earned a Master of Science in Library Sciences from the University of Illinois and performed hundreds of secondary research for reviews for Affect clients.

Wayne will lead exploratory in-depth stakeholder interviews and focus group research with district personnel. He is a professionally trained moderator who has conducted hundreds of focus groups over the past 25 years. He has earned an MBA from the University of Illinois.

Statistical and Evaluation Specialists (2):

Bridget Bly, PhD – Senior Statistician
Lizanne Destefano, PhD, M.Ed.- Educational Evaluation Specialist

Bridget and Lizanne will round out our Key Personnel for this Evaluation.

Bridget is a Senior Statistician that helps Affect clients identify, select, use, and interpret advanced statistical analytics. She has a Ph.D. in Research Psychology from Stanford University and a B.A. from Harvard University. She has been on Affect projects for the past five years, assisting with research design and use of segmentation, regression, discriminant analyses, conjoint, and structural equation modeling. She is accustomed to working on large national and statewide government evaluations.

Lizanne will be involved in helping us create the rubric and reviewing the questionnaire. She is currently a professor at the University of Illinois was involved in prior SBE ILS evaluation dating back to 2004. She has a PhD in Educational Psychology/School Psychology, a Masters of Education, and a B.S. in Physiological Psychology/Statistics from University of Pittsburgh. She is accustomed to designed research customized to educational evaluations.

Directors of Data Collection, Processing and Programming (3):

Frank DeMonte, Director—Field/Data Collection

Frank DeMonte will serve as Field/Data Collection Director. Frank will work closely with the project director and task order leader to ensure respondents are sampled effectively and quotas are achieved. The field/data collection specialist will serve as a liaison to the CATI center’s field supervisor. The
field/data collection specialist will convey respondent specifications and quotas to the field, and will monitor fieldwork progress on a daily/hourly basis. The field/data collection specialist will have responsibilities for monitoring field metrics, such as incidence levels, interview lengths, response rates, termination patterns, callbacks implemented, sample used, etc. He will report field progress and problems to the project director and task order leader to be resolved independently and/or shared with ISBE. Frank has a B.S. in Economics from Illinois State University.

**Ed Matsuoka, Specialist --Data Processing**

Ed Matsuoka will serve as the Data/Statistical Processing Specialist. Ed will work closely with the project director, task order leader, and research analysts to take data in a raw form and transform it into meaning tabulations and statistical output which can be used for interpretation. The data/statistical processing specialist will receive data regularly from field, will clean/verify/check the data, weight the data (if necessary), and process data tabulations and trend charts. Under the project director’s direction, the data/statistical processing specialist will generate multi-variate statistical output, such as from regression, CHAID, discriminant analysis, structural equation modeling, etc. that can be used to guide ISBE’s decision-making. Ed has a B.S. in Marketing from DePaul University.

**Frank Carr—Specialist—Survey Programmer**

Frank Carr is a highly talented programmer who programs client surveys in a variety of languages, and develops custom applications to display client data in highly usable dashboards or custom apps. He has been with Aeffect for 10 years and directs technology solutions across a broad range of client platforms and requirements. He currently programs many of Aeffect’s online surveys using Sawtooth Surveys and other software development languages, such as HTML, Java, Perl, and C.

**Administrative Support**

**Myrna Ulanday, Administrative Assistant**

Myrna Ulanday will serve as the Administrative Assistant for contract. Myrna will provide support to the research team in duplication/assembly of printed reports and provide support in recruitment coordination. Myrna will also be responsible assisting with shipping, word processing, and proofreading of deliverables and materials. Myrna has a BS in Health Administration.

**Experience working with state/federal program staff (40 pts)**

**Corporate Certifications**

Since its inception, Aeffect has provided consulting services to local, state, and Federal government organizations. Many of these organizations share the challenges of serving diverse stakeholders—consumers, professionals, partners, not-for-profit organizations, and legislators—by consistently demonstrating their approaches are sound, in good judgment, a wise investment, and making a difference in people’s lives. In response, Aeffect is frequently asked to provide services that will help government agencies connect with target audiences. Through various forms of research, Aeffect gathers opinions and analyzes information in a manner that helps bring insights to life.
Affect has achieved relevant certifications to enable proper classification by government contracting organizations. Specifically, the company is a 

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<tr>
<th>Certification</th>
<th>Details</th>
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<tr>
<td>Woman-owned Small Business. Our classification as a WBE (and Illinois BEP)</td>
<td>has been confirmed by the Women’s Business National Council, Chicago Branch Office.</td>
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<td>Company in Good Standing with the State of Illinois by the Governor of Illinois</td>
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<tr>
<td>Company with Approved Indirect Cost Rates approved by the National Institutes of Health with annual</td>
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Through our work with government organizations, Affect is consistently aware of and committed to delivering research and evaluation services that meet the highest standards for quality and accuracy. We repeatedly earn strong marks in contractor performance evaluations, and frequently benefit from situations in which government organizations refer our company to others in need.

**Evidence of capacity to produce case studies, vignettes, video clips (40 pts)**

Affect regularly prepares case studies of its work when the project results in a particularly valuable outcome or highlights an especially interesting capability of Affect. The Project Lead prepares the case study, as this person has most likely had the most client contact and been responsible for the majority of the study design, moderation, and analysis. The case study consists of the background and challenge, objectives, methodology, results, and what was accomplished with the insights.

In this situation, case studies will include interviewing personnel at the districts identified with the highest degree of ILS implementation. These interviews will be video recorded and edited into highlight clips and vignettes that will be used to illustrate how the ILS can be successfully implemented.

Affect regularly video records the focus groups and in-depth interviews it conducts. Certain clients prefer to have their reports and presentation decks supplemented by video excerpts of the participants’ comments. Instead of merely inserting verbatim quotes into a report, the video clips bring the Voice of the Customer directly to the client.

In one case, the Chicago Zoological Society requested that the Affect report on potential new attractions at the Brookfield Zoo be supplemented with video clips of participants from the focus groups. The report was created, and then topics for which video clips were needed for support were identified. Transcripts of the groups were generated, and clips of desired material were selected. A video editor pulled the desired material from the video and created highlight reels that were then imbedded at several points in the presentation document. This approach brought the results of the research alive for the executives of the organization, who then used the insights to determine how to use their limited resources on the proposed attractions.
**Demonstrated effective communications to technical and non-technical stakeholders**

Aeffect’s Account Director will prepare a topline report highlighting data findings for ISBE. The topline may identify additional areas of investigation required, and identify the statistical methods which will be applied to the data set in continuing analysis. ISBE will be invited to comment on the topline report and to offer additional ideas about issues to be explored further in analysis. Aeffect’s Account Director will then work with Aeffect’s technical support staff to run statistical procedures that will help illuminate data insights and identify relationships between variables. When data analysis is completed, Aeffect’s Account Director and Research Analyst, under the Project Director’s supervision, will prepare a final report, in either Word or Powerpoint format (preference specified by ISBE). If desired, Aeffect’s Project Director and/or Account Director will also present the findings at ISBE’ offices to allow for broader dissemination of the findings and allow for internal staff questions to be addressed in person.

With qualitative findings, Aeffect will develop and deliver a topline report to ISBE summarizing group discussion or individual interview themes and preliminary recommendations following the focus groups/interviews. A more detailed summary report will be delivered later containing: a project overview, summary of findings, recommendations, detailed analysis, and materials used. Specific timing will be worked out to meet all milestones, while allowing sufficient time for interviewing, content analysis, and verbatim coding. Regardless of these frames, Aeffect demonstrates flexibility and sensitivity to our clients’ needs.