

IT Strategic Plan

Proposal for Broward County Schools

October 18, 2013



GARTNER CONSULTING

Engagement: 330019004

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Gartner

Gartner Understanding and Context

- Broward County Public Schools (BCPS) is the 6th largest school district in the United States with more than 262,000 students, 32,000 employees and 327 schools.
 - While BCPS's vision and educational initiatives are clear, they are not necessarily supported by, or aligned to, current technology initiatives and projects
 - BCPS recently hired a new CIO that is making good progress and is interested in assistance to create a strategic plan to help align IT efforts to BCPS's vision.
 - With the emerging advances in technology that are beginning to allow for the scaling of personalized learning and the transformation of student learning, it is essential that BCPS has a clear plan for the future of IT.
 - BCPS is interested in engaging an independent advisory firm to conduct an IT assessment and help develop an IT strategic roadmap that is aligned with BCPS's goals. The strategic plan needs to include a roadmap of actionable steps that BCPS should take, with order of magnitude cost estimates for the key initiatives.
 - As an objective third party and recognized leader in technology, Gartner is uniquely positioned to work with the BCPS on this initiative.
 - This work will be conducted using Gartner's proven methodologies and toolkits, and the findings and recommendations associated with this project will be fact-based, data-driven and informed by current IT research.
 - Gartner will work with BCPS to craft a strategic and actionable roadmap to propel IT in alignment with BCPS's overall strategic business goals.
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Project Scope and Objectives

Scope

Define an IT Strategic Plan that will include:

- Development of a strategic vision statement for the role of IT aligned with BCPSs' three goals
- An assessment of BCPS's current IT organizational capabilities in support of their IT strategic vision
- Development of a roadmap of key actionable initiatives that align to BCPS' strategic priorities and vision
- Order of magnitude cost estimates of initiative investments to support future technology public bonding efforts
- Communication vehicle for building stakeholder and constitute understanding and buy-in of future state IT vision and roadmap

Objectives

- Key objectives of the engagement are to:
 - Understand key K-12 education trends and their implications
 - Develop and document BCPS IT vision
 - Develop a understanding of current IT capabilities
 - Provide BCPS with a roadmap, actionable initiatives and order of magnitude cost estimates to implement initiative investments.
 - Communicate the future state vision and roadmap to key constituents and stakeholders

Gartner Consulting's view of IT strategic planning supports BCPS's objectives

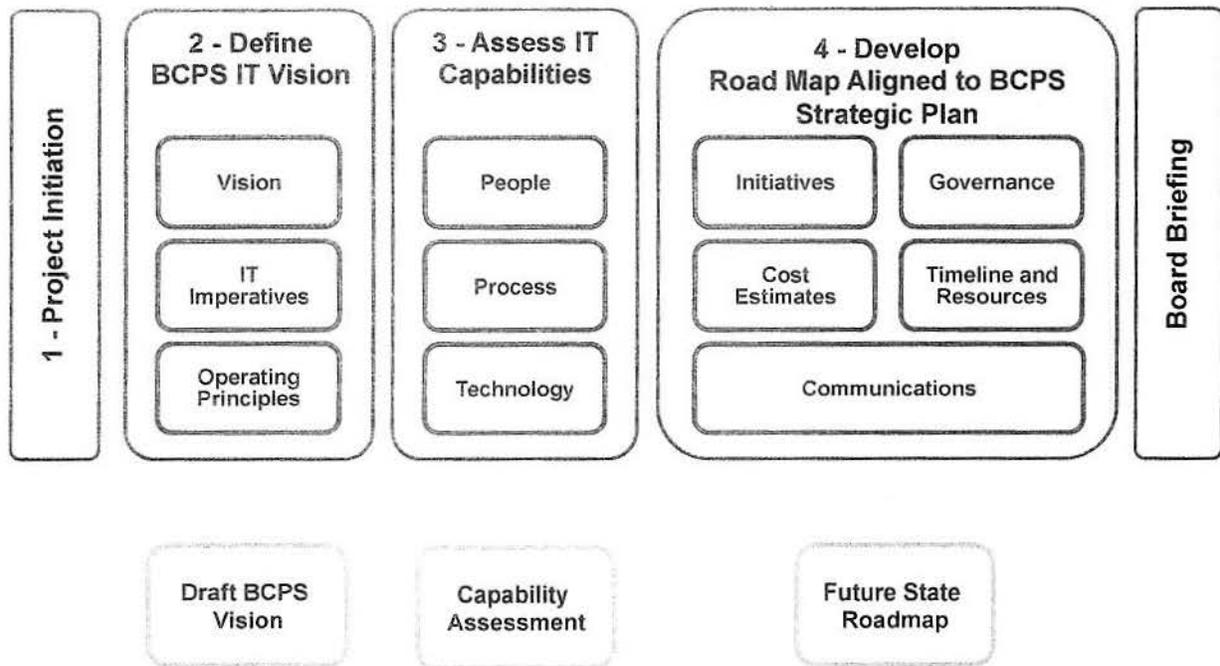
IT strategic planning is an ongoing declaration of mission, vision and objectives, bounding the right opportunities for attaining the business strategy, setting the roadmap for attaining those capabilities, and guiding all facets of the journey.

IT strategic planning will....

- **Enable or support a business strategy**
 - Whether or not the business strategy is well articulated,
 - Existing or new, stable or volatile
- **Clarify priorities and trade-offs**
 - Anchored in core values and principles
 - Guides consistent and transparent decision-making
- **Balance visionary thinking with pragmatic realities**
 - Long-term in mind, but
 - Bounded by current constraints and capabilities
- **Encourage an intentional, ongoing journey**
 - Manage change rather than react to it
 - Adjust tactically rather than historically
- **Incorporate external perspectives**
 - Ensure completeness and viability of vision
 - Eliminate blind spots and learn from others

Statement of Work

Approach – Overall Methodology



Detailed Approach

Task 1: Project Initiation

Task 1: Project Initiation

Objective:

- Set the foundation for a successful engagement that is delivered on time and within budget, and achieves business objectives

Activities performed by Gartner:

- Hold a kickoff meeting to ensure understanding of the project objectives, scope, schedule, and milestones, roles, responsibilities and required resources. Gartner will also discuss anticipated risks and mitigation plans, based on lessons learned from past experience
- Gather any relevant background material
- Outline interview needs
- Finalize project schedule and schedule BCPS interviews and workshop sessions

BCPS responsibilities:

- Ensure attendance at kickoff meeting by Project Sponsor, Project Manager and other key stakeholders, as determined prior to kickoff
- Identify key stakeholders for interviews and workshops
- Provide documentation as requested

Deliverable(s) and Time Frame

Deliverable(s):

- Kickoff meeting materials
- Draft project schedule (including interview schedule)
- Draft project plan

Time Frame:

- Week 1

Detailed Approach

Task 2: Define BCPS IT Vision

Task 2: Define BCPS IT Vision

Objective:

- Determine key IT imperatives in support of BCPS infrastructure, applications and data.
- Define role and vision for BCPS IT going forward, and key decision-making guidelines (operating principles)
- Build IT vision consensus with School Board

Activities performed by Gartner:

- Review emerging K-12 education trends in technology and consult with internal/external subject matter experts to include perspectives based on other similar initiatives
- Prepare and conduct IT visioning workshop with BCPS Strategic Advisory Committee to develop vision and begin to develop consensus
- Develop IT imperatives and key linkages to BCPS strategic plan and defined goals
- Document IT vision and IT operating principles
- Refine and validate IT vision with BCPS Board

Client responsibilities:

- Review findings and help refine; provide relevant context to assure accuracy of interpretation
- Jointly develop and lead Strategic Advisory Committee vision workshop

Deliverable(s) and Time Frame

Deliverable(s):

- IT Vision workshop materials
- Documented IT imperatives linked to BCPS strategic plan and goals
- Documented IT vision and operating principles

Time Frame:

- Weeks 1-2

Detailed Approach

Task 3: Assess IT Capabilities

Task 3: Assess IT Capabilities

Objective:

- Provide assessment of key BCPS IT capabilities versus future state needs as defined by the BCPS IT vision to be defined in Task 1 and relevant K-12 education technology trends
- Determine key gaps of current vs. future state

Activities performed by Gartner:

- Conduct individual/group interviews with up to 15 BCPS academic/administrative/pedagogy and IT executives
- Conduct 4 group interviews with established elementary, middle, high school and central advisory groups
- Review any relevant BCPS documentation
- Assessment of IT capabilities at the group level vs. needed capabilities in sufficient detail to support business strategy defined as:
 - Application lifecycle management (using Gartner application survey assessment tool)
 - IT service management and support
 - BCPS IT organization capabilities
 - Data governance
 - IT governance
- Prepare capabilities assessment findings

Deliverable(s) and Time Frame

Deliverable(s):

- Documented assessment findings and key gaps for the key focus areas

Time Frame:

- Weeks 3-5

Client responsibilities:

- Provide all relevant previously completed analyses and documentation
- Identify interviewees and schedule
- Review and provide comment on capability assessment findings

Detailed Approach

Task 4: Develop Roadmap

Task 4: Develop Roadmap

Objective:

- Articulate an agreed upon IT roadmap that enables the BCPS IT vision
- Specify programs and initiatives to close the IT capability gaps
- Develop order of magnitude cost estimates of roadmap initiatives
- Communicate vision and roadmap to key stakeholders

Activities performed by Gartner:

- Summarize two to three year IT roadmap consisting of key initiatives
- Determine specific initiatives required to close gaps to meet defined IT vision
- Review initiatives with appropriate subject matter experts to help ensure initiatives are comprehensive and reflect most effective approaches to meet objectives
- Develop order of magnitude cost estimates
- Conduct workshop with Strategic Advisory Committee to review and refine roadmap
- Refine and validate roadmap with BCPS Board
- Summarize roadmap key highlights to be used in BCPS stakeholder communication

Client responsibilities:

- Review preliminary recommendations and help to refine

Deliverable(s) and Time Frame

Deliverable(s):

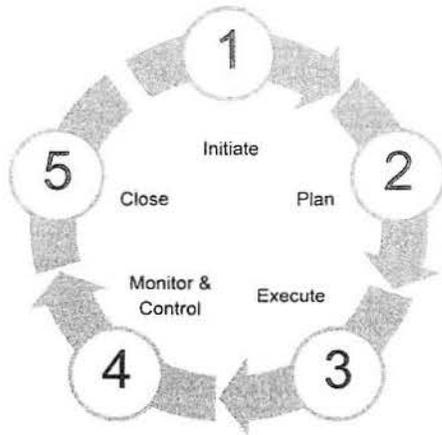
- Documented roadmap
- Documented order of magnitude cost estimates
- Recommended highlights for stakeholder communication medium to be used for developing an understanding and buy in for future state BCPS IT vision

Time Frame:

- Weeks 6-7

Gartner Project Management Life Cycle

- Based on our internal subject matter expertise and lessons learned, as well as external sources including the Project Management Institute's (PMI®) Project Management Body of Knowledge (PMBOK®) Guide.
- Aligned with this globally recognized standard (ANSI/PMI 99-001-2008) to maximize value for our clients, minimize the risk for our clients' projects and ultimately ensure client satisfaction.



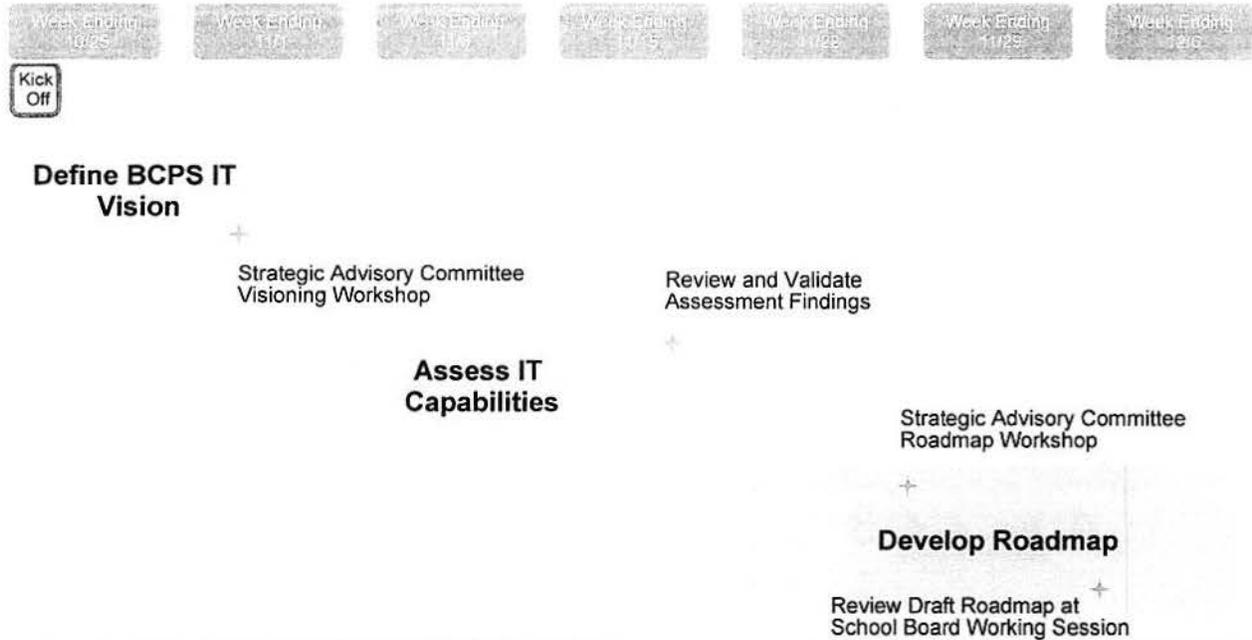
Gartner PM Activities and Results

The following Gartner Project Management activities are designed to achieve project success and client satisfaction through on-time and on-budget delivery, open lines of communication and detailed reporting throughout the project, and deliverables that meet client needs and objectives:

- Create customized approach.
- Create collaborative approach.
- Conduct a client kickoff planning meeting.
- Build project management plans.
- Apply project management tools and leading techniques.
- Define governance model.
- Manage execution.
- Conduct quality assurance.
- Proactively manage changes and risks.
- Follow quality control process.
- Report performance.
- Review contract with client at project close.
- Ensure knowledge transfer.

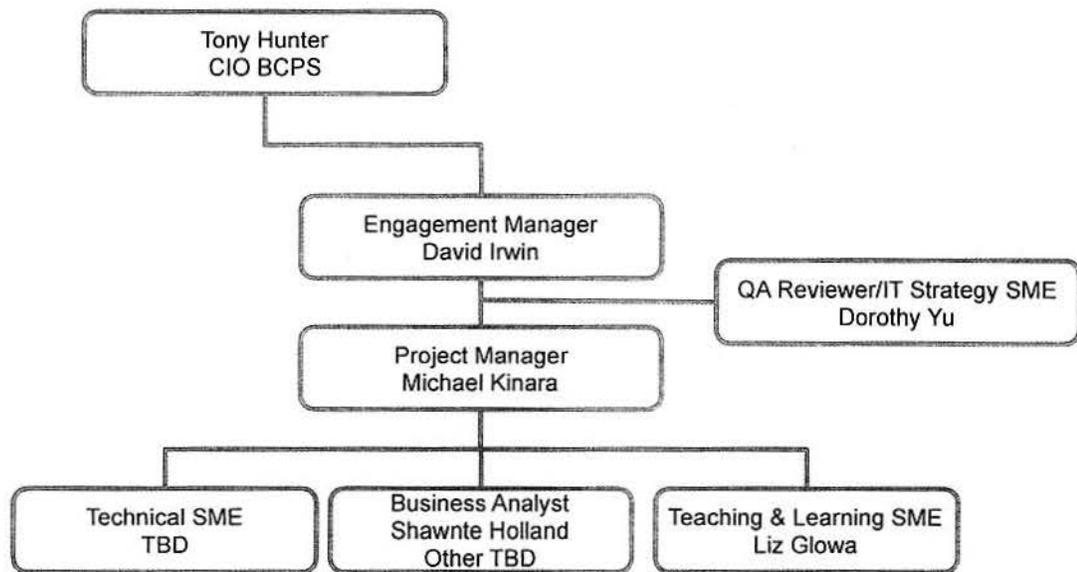
Project Schedule

Gartner anticipates completion of this engagement within 7 weeks, as detailed in the following figure. This schedule is dependent on the assumptions included in this Statement of Work. The schedule allows time in between each phase for project reviews and deliverable acceptance. A detailed project schedule will be developed during the planning activity of the Kickoff task.



Gartner Project Team Organization

- Gartner has created an organization structure for this engagement that ensures high-level sponsorship and quality assurance, strong day-to-day project management, a focused team of project consultants, and deep subject matter expertise.



Gartner Roles and Responsibilities

Gartner Associate	Role	Responsibilities
David Irwin	Engagement Manager	<ul style="list-style-type: none"> ▣ Ensure that Gartner activities support BCPS goals ▣ Build and maintain a long-standing relationship with BCPS ▣ Provide high-level oversight to the project and become more heavily involved should any issue resolution be necessary
Michael Kinara	Project Manager	<ul style="list-style-type: none"> ▣ Be responsible for the day-to-day management of project initiatives ▣ Ensure that project deliverables are completed on time and meet the Gartner quality standards ▣ Act as the primary point of contact for the Gartner team ▣ Work closely with BCPS to ensure that Gartner is meeting its needs
Dorothy Yu	Subject Matter SME - IT Strategy, QA	<ul style="list-style-type: none"> ▣ Support the core project team by providing subject matter expertise as needed throughout the engagement ▣ Participate in deliverable creation, deliverable review and client presentations as needed
TBD	Technical Subject Matter Expert	<ul style="list-style-type: none"> ▣ Support the core project team by providing subject matter expertise as needed throughout the engagement ▣ Participate in deliverable creation, deliverable review and client presentations as needed
TBD	Business Analyst	<ul style="list-style-type: none"> ▣ Provide day-to-day consulting support for project tasks ▣ Be supported by additional project consultants as needed
Liz Glowa	Teaching & Learning SME	<ul style="list-style-type: none"> ▣ Support the core project team by providing a context-sensitive perspective to issues specific to BCPS based on industry-leading research and practice ▣ Participate in analysis and comparisons, and review deliverables as needed

Assumptions – BCPS Participation

The deliverables, schedule and pricing in this proposal are based on the following assumptions:

BCPS Participation

- BCPS will assign a senior-level project sponsor that will be influential in ensuring that project stakeholders across different BCPS colleges, schools and departments participate in project activities as detailed in this statement of work.
- BCPS will designate a project manager to act as the primary point of contact for this project. The BCPS project manager will be expected to work closely with the Gartner employees as needed and will:
 - (a) approve project priorities, detailed task plans and schedules;
 - (b) facilitate the scheduling of Gartner interviews with appropriate client personnel;
 - (c) notify Gartner in writing of any project or performance issues; and
 - (d) assist in resolving project issues that may arise.
- The work effort described in this proposal assumes that BCPS personnel are available to assist in the project as defined in this Proposal. In the event that BCPS personnel are not available, a change of scope may be necessary.
- The level of detail (i.e., order of magnitude cost estimates) and quality of deliverables will be dependent on the information provided by BCPS within the available time for the project.
- BCPS will review and approve documents within five business days. If no formal approval or rejection is received within that time, and as a direct result of the delay the Project schedule extends or Gartner incurs documented additional costs, BCPS and Gartner will negotiate a mutually agreeable change order to account for such schedule change and/or additional costs.
- BCPS is to schedule BCPS resources for project activities and provide meeting facilities as necessary.
- BCPS personnel will be made available per the final project schedule.

Assumptions

Data Collection and Key Personnel

Data Collection

- The due diligence (as-is) data are reasonably available via interviews and documentation review.
- BCPS will provide timely access to all appropriate personnel to be interviewed. These personnel will have the ability to provide data necessary to complete this project, answer questions, provide existing documentation and attend working sessions.
- Project pricing assumes that Gartner will conduct interviews and workshops as detailed in the statement of work at BCPS and that BCPS will arrange all sessions with BCPS personnel.
- Gartner will conduct up to 15 1-hour individual/group interviews and will conduct 2 IT executive steering committee workshops and 2 BCPS Board presentations as defined in the statement of work.
- Gartner's assessment of capabilities is at the organization level (for groups and not individuals)
- Roadmap recommendations will represent the "key" initiatives and will include a maximum of 15
- BCPS is responsible for issuing application assessment survey and collecting and aggregating results within the time frame indicated on the project schedule
- Project pricing assumes that Gartner will conduct workshops as needed during the engagement and that BCPS will arrange all sessions with BCPS personnel.
- All data collection and interviews/workshops will take place via telephone or in person at location as described in this proposal and/or as agreed to at the project kickoff.

Key Personnel

- Resumes of key personnel provided in this proposal assume a project start date of October 21, 2013. If the actual project start date is different, proposed individuals may not be available. In this event, we will work with BCPS to identify alternative personnel with appropriate skills and background.
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Assumptions

Place of Performance, Deliverables and Changes to Scope

Place of Performance

- With the exception of interviews and workshops, Gartner work will be performed at Gartner locations.
- All workshops and meetings are detailed on each of the project tasks of this SOW.
- Office space, telephones and access to the open Internet will be made available to Gartner staff at BCPS locations for on-site project time.
- Gartner will have access to printing/copying services at BCPS locations.

Deliverables and Changes to Scope

- Any requests for additional information (beyond the details described in the tasks above) that are made by BCPS will be considered a change in scope for this engagement and will be handled accordingly (see Changes to Scope section of this proposal).
- All deliverables will be developed using Microsoft products (for example, Project, Excel, Word and PowerPoint).

Investment Summary and Authorization

Investment Summary and Invoicing

- Based on the scope described in this SOW, Gartner's fixed professional fee is \$98,000 and is exclusive of all applicable taxes.
- Travel and other project related expenses are included in our fees.
- Gartner will submit invoices for payment as follows:
 - 25% of the professional fee will be invoiced upon completion of our kick-off meeting.
 - 50% of the professional fee will be invoiced upon completion of the deliverable defined in tasks 1 & 2
 - The remaining balance of the professional fee will be invoiced upon completion of deliverables in task 4.
 - All professional fees and project expenses will be invoiced and paid in \$US Dollars.
- Invoices are payable 30 days from the date of invoice
- While we do not itemize billing for professional services, we agree and will comply with any reasonable requests for records substantiating our invoices
- If BCPS requires a purchase order (PO) number, please specify the PO number in the Authorization section and forward a copy of the PO, with this agreement, to name/address or fax of appropriate individual. Ensure that the PO includes all labor and travel expenses quoted in this Statement of Work. Any pre-printed terms on the PO that are in addition to or in contradiction of the terms of this agreement shall be inapplicable.

Investment Summary and Invoicing

- Gartner's cost estimate is both reasonable and realistic. Our rates are reasonable for the following reasons:
 - Gartner's consulting staff rely heavily on Gartner's research. Our consultants utilize the research in a variety of ways, including leveraging the content directly and including it in Gartner deliverables. Consultants will also have the analysts participate directly by reviewing deliverables or taking part in the project directly. Each use of research provides significant value, and comes with a real opportunity cost. This resource is built into our hourly rates.
 - Gartner comes to the table with a complete set of tools and templates developed through prior engagements and applied subject matter expertise. This enables more-effective use of resources by both Gartner and Andover, which results in fewer hours required to complete tasks and deliverables and less risk of rework or wasted effort.
 - Gartner does not charge for administrative, contracts management or deliverable production. All of those associated costs are built into our labor rates. In other words, our administrative and secretarial personnel, our contracts management personnel, and our editors, graphics and production staff are all funded from overhead. These activities contribute to the hourly rates charged.
 - Gartner is a senior-leveraged practice. Our rates reflect the heightened level of experience of our associates. The value of Gartner's senior-leveraged practice is typically realized through greater engagement team efficiency.

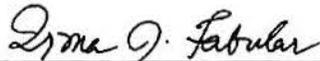
Changes to Scope

- The scope of this engagement is defined by this Statement of Work. All BCPS requests for changes to the SOW must be in writing and must set forth with specificity the requested changes. As soon as practicable, Gartner shall advise BCPS of the cost and schedule implications of the requested changes and any other necessary details to allow both parties to decide whether to proceed with the requested changes. The parties shall agree in writing upon any requested changes prior to Gartner commencing work.
- As used herein, “changes” are defined as work activities or work products not originally planned for or specifically defined by this SOW. By way of example and not limitation, changes include the following:
 - Any activities not specifically set forth in this SOW
 - Providing or developing any deliverables not specifically set forth in this SOW
 - Any change in the respective responsibilities of Gartner and BCPS set forth in this SOW, including any reallocation or any changes in engagement or project manager staffing
 - Any rework of completed activities or accepted deliverables
 - Any investigative work to determine the cost or other impact of changes requested by BCPS
 - Any additional work caused by a change in the assumptions set forth in this SOW
 - Any delays in deliverable caused by a modification to the acceptance criteria set forth in this SOW
 - Any changes requiring additional research analyst time or changes to research analyst resources

Authorization

This Proposal is submitted under the terms and conditions of the Gartner Inc. Florida Department of Management Services Alternate Contract Source agreement number ACS-973-501-12 with an effective date of 07 June 2012. When signed by Gartner and BCPS, this SOW is an attachment to and governed by the Alternate Contract Source agreement ACS-973-501-12 between the parties. These two documents will set forth the relationship between the parties for this engagement. This Statement of Work may be modified at anytime provided such changes are agreed by the parties in writing.

SUBMITTED ON BEHALF OF GARTNER, INC.



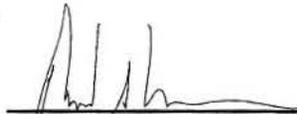
SIGNATURE

Irma Fabular, Senior Managing Partner

PRINT NAME AND TITLE

October 18, 2013

DATE



SIGNATURE

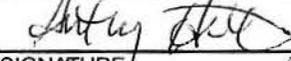
David Irwin, Senior Director, Education Practice

PRINT NAME AND TITLE

October 18, 2013

DATE

AGREED ON BEHALF OF BROWARD COUNTY PUBLIC SCHOOLS



SIGNATURE

Anthony Hunter

PRINT NAME AND TITLE

10-18-2013

DATE

PO NUMBER (If applicable)

Statement of Work Validity Period and Further Assurances

- The Proposal, including the Statement of Work, is valid for 60 days from October 18, 2013.
- Gartner Research and Consulting recommendations are produced independently by the Company's analysts and consultants, respectively, without the influence, review or approval of outside investors, shareholders or directors. For further information on the independence and integrity of Gartner Research, see "[Guiding Principles on Independence and Objectivity](#)" on our Web site, www.gartner.com or contact the Office of the Ombudsman at ombudsman@gartner.com or +1 203 316 3334.

Attachments

Project Team Biographies

Project Team Biographies

David Irwin, Engagement Manager



David Irwin joined Gartner in 2003 and currently leads Gartner Consulting K-12 Education Practice. David has worked with both K-12 school districts and K-12 education technology providers for more than 10 years helping them to solve their toughest business problems. David's representative experience includes:

- For Fulton County Schools, provided a strategic assessment of their technology plan that led to voter referendum and approval of a 5 year \$250 million technology plan.
- For the New York City Department of Education, serve as the engagement manager on a project that provided PM/QA services for the implementation of a \$80 million special education student information system used by more than 160,000 users (more than 10,000 daily).
- For Leander Independent School District (Austin, TX) led a team that helped develop a business case and roadmap for the replacement of administrative and instructional systems in order to support a student centered, personalized learning experience.
- Led a team that performed an applications portfolio assessment (APM) for the province of Alberta, Canada's Ministry of Education in support of their goal of implementing a competency-based learning system.
- For the New York City Department of Education, served as the engagement manager on a project that provided PM/QA services for the implementation of a learning management system platform to provide District-wide blended learning, credit recovery and distant learning for district students.
- For the New York City Department of Education, Bureau of Contract Aid served as the project manager on a project to reconcile payments made to special education providers. Aspects of the project included developing a reconciliation plan and training a team on how to prepare reconciliations, interpreted client data to improve reconciliation processes and creating a robust database to complete the reconciliations.
- For the New Jersey State Department of Education served as the project manager for a project that provided quality assurance for the implementation of a COTS application used to facilitate the approval and tracking of a \$12 billion long-range school construction plan.
- For the Twin Towers Fund (at the direction of Mayor Giuliani) served as the project manager on an engagement that created policies and procedures, business and technical requirements, and developed an application to aid in the administration (record, data enter, deposit, and process) of over 220,000 individual donations that totaled over \$150 million. Additionally, created business processes for administering the distribution of \$48 million in funds to 406 families.

Project Team Biographies

Michael Kinara, Project Manager



Michael Kinara is a director with Gartner Consulting, based in New York City. Mr. Kinara's area of expertise is in IT strategic planning, primarily with K-12 and higher education clients. He has been involved in all phases of the strategic planning process, including information and requirements gathering, technology and IT organization assessments, strategy formulation and implementation planning. Mr. Kinara joined Gartner in 1999 and is a certified Project Management Professional (PMP). Mr. Kinara's recent project experience includes the following: Mr. Kinara's representative experience includes:

- For a large school district – led a team that developed a business case and cost model for the replacement of their SIS, ERP, HR, LMS and Instructional Management Systems.
- For a state's department of education — managed a project that benchmarked and assessed the efficiency and cost structure of IT services provided, reviewed the effectiveness of the organization's IT management functions, and developed recommendations for optimizing IT service delivery.
- For a large school district – developed requirements and facilitated the outsourcing of their personalized learning system.
- For a large state university — facilitated a comprehensive IT strategic planning process for an administrative computing organization with a \$35 million budget. Worked extensively in consensus-based workshops to define business drivers for the organization and ensure alignment of long-range organizational, governance and technology strategic goals.
- For a large California county government — lead consultant in a project that worked with multiple stakeholders to develop a comprehensive countywide IT strategic plan that defined key business strategies and identified detailed IT initiatives to be executed during a three-year period to support the county's business strategies.

Mr. Kinara earned a master of business administration, with a concentration in strategic management, and a bachelor of science in international business from United States International University. He holds a specialized certificate in e-commerce technology from the University of California, San Diego.

Project Team Biographies

Dorothy Yu, Strategy Subject Matter Expert



Dorothy Yu is a Managing Vice President and has more than 25 years of experience leveraging IT and developing strategic technology solutions for business value and impact. She specializes in the alignment and application of technology for increased IT effectiveness. Ms. Yu has spearheaded large scale organizational transformations by designing and implementing client relationship management, program management, performance measurement and change management solutions. She has worked extensively with Fortune 500 clients and has broad experience in a variety of industries, including financial services, high tech, manufacturing, and federal/state agencies. Ms. Yu is currently the global leader of Gartner Consulting's CIO & IT Executive Strategy, Organization, Governance Practice and is based out of the Boston, Massachusetts office. Engagement examples include:

- For a multibillion dollar global manufacturing company — developed an enterprisewide IT strategy and road map to achieve strategic growth and cost effectiveness, that aligned IT investments with strategic business priorities and established a new IT organizational model for increased IT effectiveness in an aggressive M&A environment.
- For a major U.S. city – led an enterprise-wide strategic planning effort, aligning the city's technology efforts with the major's goal to be more customer-centric. The plan included specifying cross-agency IT initiatives, creating a deputy mayor level technology steering committee, and establishing a formal program management and review process.
- For a large Federal agency — developed an improved IT organizational model impacting over 5,000 IT employees, that included new governance, portfolio management, and process models with key performance metrics in a highly decentralized business environment
- For a large Federal agency – provided review and oversight services related to planned ERP implementations for both financial and logistics applications. Responsibilities included identifying program risks across multiple facets, assessing organizational readiness to implement ERP, reviewing vendor RFQs to ensure program success, developing key performance indicators to measure program performance and business value achievement
- For a multibillion dollar financial services organization – led a transformational change initiative for a global operating environment, involving business process improvements, organizational restructuring, and application rationalization and realignment, resulting in a high-performing global operating model.
- For a global manufacturer of specialty pharmaceuticals - conducted an objective IT strategic assessment of divestiture plans with specific focus on the global IT organization, strategic plan, governance, application portfolio, infrastructure and IT budget.
- Prior to joining Gartner, Ms. Yu was a consulting partner at PricewaterhouseCoopers, where she served as the global partner of the eBusiness Knowledge Management Practice and leader of the Northeast Region. She has held management positions at State Street Corporation and Scient, and led applied research artificial intelligence/operations research projects at MITRE. She has served on the Board of Big Sisters Association of Greater Boston, MIT System Dynamics Institute, Boston Chamber of Commerce, and Editorial Board of Knowledge Management Review. Ms. Yu graduated with honors with a B.S in Computer Science from the University of Missouri and an M.S. in Operations Research, Industrial Engineering from Purdue University.

Project Team Biographies

Elizabeth Glowa, Ph.D., K-12 Subject Matter Expert



- Elizabeth (Liz) Glowa is a recognized national leader of design and pedagogy of K-12 online learning with an emphasis on 21st Century instructional strategies and the use of instructional technology for diverse groups of learners to support student achievement and extended learning opportunities.
- A sample of Liz's experience includes:
 - Serving as a consultant to the International Association for K-12 Online Learning (iNACOL) to develop design specifications for information systems for their CompetencyWorks project
 - Served as a subject matter expert for the NYC Department of Education in support of their Virtual Learning project and ensure that they had the benefit of the most comprehensive and current thinking regarding K-12 virtual education
 - Served as the coordinator for the budget for the Maryland State Department of Education's distance learning program, Maryland Virtual Learning Opportunities Program (MVLO) and was responsible for providing leadership, direction and oversight for the implementation of online student and teacher courses as part of the MVLO
 - Served as the Director of the Instructional Technology Support Team for Montgomery County Public Schools (MCPS) responsible for the implementation of the policy on educational technology
- Liz has been focused on transforming K-12 education for more than 40 years as a teacher, special education assistant, assistant principal, principal, district leader and instructional technology consultant. Liz has the BA in Elementary Education from American University, a Masters in Teaching from Trinity College and a Ph.D in Learning and Behavior Disorders from American University.

Project Team Biographies

Shawnté T. Holland, Business Analyst



- Shawnté Holland is a Senior Consultant with notable experience in K-12 and Higher Education industries. She has subject matter expertise in IT Strategy Development, Human Capital Management, and Program & Project Management. Additionally, Ms. Holland is proficient in instructional systems design, organizational and process assessments, organizational design, and business process (re)engineering. She also has experience in the health & human services, telecommunications, financial, aviation, and defense industries for both private and public sector organizations.
- Ms. Holland's over 13 years of experience in the technology realm includes the following projects:
 - Bill & Melinda Gates Foundation – SIS Market Analysis: Led a team in the data collection and analysis of information concerning the selection, implementation, and use of Student Information Systems (SIS) and Learning Management Systems (LMS) across the U.S. K-12 space.
 - Leander Independent School District (LISD) - Business Case Analysis: Ms. Holland is managing a project to guide LISD through a business case analysis for its administrative IT solutions that results in the development of an RFP .
 - University of Cincinnati (UC) – Strategy: Guided UC through the process of defining its academic IT strategy and benchmarking its capabilities, Ms. Holland was responsible for identifying trends in the market and assessing the quality of IT services at the university.
- Ms. Holland received her Master of Science in Technology Management from George Mason University and her Bachelor of Science in Commerce from the University of Virginia's McIntire School of Commerce, concentrating in Management Information Systems and Business Management. Ms. Holland also holds a PMP certification from the Project Management Institute and a Federal CIO certification from the Federal CIO Council. Ms. Holland is co-author of a study on K-12 special education needs and a report outlining the attitudes of instructional professionals toward SIS and LMS solutions.

Contacts

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