To: Finance & Operations Committee

From: Marquelle Middleton, Director of School Choice & Enrollment

Date: November 16, 2022

The following memo is submitted in support of and justification therein of the proposed agreement between TetherEd and New Haven Public Schools. This memo shall also address all questions submitted by members of the Board of Education in reference to the agreement.

TetherEd is a new company, New Haven Public Schools is excited to work with. TetherEd will provide development and licensing of the School Explorer tool. The School Explorer tool was developed in collaboration with New Haven Public Schools, Office of School Choice & Enrollment under a previous non-financial MOU with Princeton University and ConsilumBots. This new agreement will be a continuation of the project as the product now is owned and developed by TetherEd. The School Explorer tool will provide added value to the school choice experience and provide parents with real-time application feedback and simulation results so they can make informed decisions. In addition, the School Explorer will allow families to take virtual tours of a subset of schools, watch videos from school administrators and staff and view historical analysis regarding placement results.

Questions Submitted by BOE members:

A. The website front page (tether.education) is in a language other than English. Why?

TetherEd is a minority owned business and the company's leader and most staff are native-Spanish speakers hailing from various central and south American countries. Much of the current school choice work the company is invested in is in South and Central America. I have reviewed the website; the website is available in English via the google translate feature. There is a language tab in the upper right-hand corner to toggle to English. Please note this is the company's website and not the website that families would use to access this transparency tool.

B. The page to load specific schools in New Haven didn't load 4 out of the 5 times I attempted to look at schools (https://explore.newhavenmagnetschools.com/explorer/). The website doesn't appear to work well when I attempt to access it.

The website does appear to load. Please note that currently New Haven Public Schools has no existing agreement to use the developed product and the newest version as we are not currently paying for the product. Our MOU and the 2 years of free use of service has expired.

C. It appears that in order to get information on schools, you have to load personal information. Why? Also, from their terms and privacy policy ***"Types of Data Collected: 1) The NHPS Explorer website preloads user profiles for applicants and members of the NHPS community to make it easier to use and navigate the website. 2) Data on user behavior is collected to better understand how to improve the information provided to families looking for schools. 3) The NHPS Explorer may ask you to provide certain personally identifiable information that can be used to contact or identify you. Personally identifiable information may include, but is not limited to: email address, first name and last name, phone number, and address among others. This information is requested to provide information to users regarding their schooling options."***

It is best that users are authenticated and provide us with their information so we have a better sense of who is using the tool. In addition, users will be able to receive feedback on their application's risk. If we do not collect basic information to contact the parent, we aren't able to enhance their school choice experience. Again, the current version which we will plan to use is not live at this time until the agreement is approved etc. Users will be able access it using their google suite information or a guest user; this will increase the ease of use.

D. The choice director is on the website making some sort of supportive statement for the business.
  · What is the NHPS policy for staff members promoting contractors? I have researched and determined the answer to this question. Policy 3313 states ***"No employee shall endorse any product of any kind in such a manner as will identify him/her in any way as an employee of the district."***

· Was there any remuneration for the participation?

· Was the statement vetted and approved by the administration? I'm assuming the answer is no, but I would like to hear that directly from the administration.

I have asked the company TetherEd and Mr. Christopher Nielsen to remove any such endorsements listed on their website ASAP provided by me. There was no renumeration provided to Mr. Middleton from any party. I was unaware that I was in violation of any policies and do want to express that such was never my intent. I'd also like to provide background on that matter as well.

Under a previous non-financial research MOU with Princeton University, we were afforded the opportunity to use the recently developed school explorer that would allow parents to learn more about schools and simulate their odds of placement at preferred schools should the participate in the districts school choice process. This was one of the transparency tools we launched and were very proud of. That MOU has since expired, and we hoped to continue to allow parents to make use of this very helpful tool. We made use of the tool for two-years under the previous MOU. We did understand that post-MOU we would need to purchase the product for our families. During the MOU I was asked to provide feedback on the tool as the principal researcher planned to expand the footprint of the school explorer in the future. I did provide a quote at that time. I believe this was roughly more than 1 year ago.

Again, I had no ill intent and have communicated to TetherEd that any such quotes suggesting endorsement must be stricken from their website immediately as I am a public servant and seemingly in violation of an existing policy. I do not believe they will have any problem doing so. **As of Sunday 11/14, the quote on their website has been removed.**

AGREEMENT COVER SHEET

Cover Sheet is an Internal Document for Business Office Use

Please Type

Contractor full name: TetherEd

Doing Business As, if applicable:

Business Address: 227 Church Street, New Haven, CT 06510

Business Phone:

Business email: chris@tether.education

Funding Source & Acct # including location code: Magnet 17-22 Central Office C/O, 2517-6258-56694-0000

Principal or Supervisor: Marquelle Middleton

Agreement Effective Dates: From 11/15/22 To 06/30/23.

Hourly rate or per session rate or per day rate. $7,500-Virtual School Explorer & Simulator Platform; $7,500-Feedback Suite
Total amount: $15,000

Description of Service: Please provide a one or two sentence description of the service. *Please do not write "see attached."*

TetherED will provide a Virtual School Explorer tool that allows families to explore school programs operated by NHPS and inform themselves about the different schooling options in New Haven as well as the historic chances of being assigned to the schools they are interested in.

Submitted by: _Julie Lip_____   Phone: _8-1436_____

Memorandum

To:	New Haven Board of Education Finance and Operations Committee
From:	Marquelle Middleton
Date:	October 17, 2022
Re:	TetherEd Agreement

Please ***answer all questions and attach any required documentation as indicated below***. Please have someone **ready to discuss** the details of each question during the Finance & Operations meeting or this proposal might not be advanced for consideration by the full Board of Education.

1. **Contractor Name**: *TetherEd*

2. **Description of Service**: *TetherEd, Inc. will be responsible for the development, hosting and management of multiple web-based transparency tools to support family understanding of and application decisions to the school choice lottery. There are several tools TetherEd will implement and manage. The first service is the enhancement, hosting and support of the NHPS specific Virtual School Explorer platform to enable families to get to know schools in the city from the comfort, convenience, and security of their homes. The second service is an automated application Communication and Application Feedback Suite that allows the school choice program administrators to manage questions from the public and to communicate personalized information to families about their applications and provide relevant information in a timely fashion. Finally, the third service is an Analytics and Transparency Service that helps provide parents, school administrators and the broader community access to transparent and easy to interpret data visualization on the application and assignment process.*

3. **Amount** of Agreement and hourly or session cost: *$15,000.00*

4. **Funding Source** and account number: *Magnet 17-22 Central Office C/O, 2517-6258-56694-0000.*

5. Approximate number of staff served through this program or service: *N/A*

6. Approximate number of students served through this program or service: *20,000 students' district wide (7,000+ applicants each year).*

7. **Continuation/renewal or new Agreement?**
   Answer all questions:
   a. If continuation/renewal, has the cost increased. If yes, by how much? *No this is a NEW service.*
   b. What would an alternative contractor cost: *N/A*
   c. If this is a continuation, when was the last time alternative quotes were requested? *N/A*
   d. For new or continuation: is this a service existing staff could provide. If no, why not? *New Haven Public Schools does not employ a data scientist, developer or IT professional staff able to provide these services.*

8. **Type of Service**:
   Answer all questions:
   a. Professional Development? *No*
      i. If this is a professional development program, can existing staff provide the service? If no, why not? *N/A*
   b. After School or Extended Hours Program? *No*
   c. School Readiness or Head Start Programs? *No*
   d. Other: (Please describe) *This is a professional service.*

9. **Contractor Classification:**
   Answer all questions:
   a. Is the Contractor a Minority or Women Owned Business? *Yes, minority owned.*
   b. Is the Contractor Local? *Yes*
   c. Is the Contractor a Not-for-Profit Organization? If yes, is it local or national? *No*
   d. Is the Contractor a public corporation? *No*
   e. Is this a renewal/continuation Agreement or a new service? *No*
   f. If it is a renewal/continuation has cost increased? If yes, by how much? *N/A*
   g. Will the output of this Agreement contribute to building internal capabilities? If yes, please explain: *Yes, the results of this agreement will support the marketing and recruitment efforts associated with increasing overall student enrollment in New Haven Public Schools and particularly our Magnet Schools, which will increase school revenue and support to 15 Interdistrict schools. In addition, these tools specifically the school explorer will allow the district to ensure the process is transparent for families.*

10. **Contractor Selection: In this section, please describe the selection process, including other sources considered and the rationale for selecting the contractor. Please answer all questions:**

    a. What specific skill set does this contractor bring to the project? Please attach a copy of the contractor's resume if an individual or link to contractor website if a company: *This vendor has data-science and research expertise to provide innovative and high quality transparency tools to help families access information about the range of our schools of choice in-district and will help us catch up with the times by helping families predict their odds of placement based on mock applications submitted. TetherEd will implement an application simulator that will give families real-time and accuate simulated placement results.*

    b. How was the Contractor selected? Quotes, RFP/RFQ, Sealed Bid or Sole Source designation from the City of New Haven Purchasing Department? *Quotes; this is a unique niche of work. The Office of School Choice & Enrollment previously worked with the owner of TetherEd under an MOU agreement; we hope to expand simulation, predictive and transparency services with TetherEd to serve our prospective families etc.*
    c. Is the contractor the lowest bidder? If no, why? Why was this contractor selected? *There was no bidding process associated with this service and agreement. A quote was requested and provided to the Director of School Choice & Enrollment.*
    d. Who were the members of the selection committee that scored bid applications? *N/A*
    e. If the contractor is Sole Source, please attach a copy of the Sole Source designation letter from the City of New Haven Purchasing Department.

11. **Evidence of Effectiveness & Evaluation**
    Answer all questions
    a. What **specific need** will this contractor address and how will the contractor's performance be measured and monitored to ensure that the need is met? *This contractor will manage all data-science and predictive analysis. The Director of School Choice & Enrollment and MSAP coordinator will meet regularly with the contractor to ensure projects are user-friendly and meet the needs of New Haven families.*

    b. If this is a **renewal/continuation service** <u>attach a copy of the evaluation or archival data</u> that demonstrates effectiveness. *N/A*

    c. How is this service aligned to the District Continuous Improvement Plan? *All work under this agreement will be overseen by the Office of School Choice & Enrollment. All work conducted under this agreement directly correlates to the most recent district improvement plan as an effort to increase student diversity and provide theme-based learning opportunities for all enrolled students.*

12. Why do you believe this Agreement is fiscally sound? *This agreement is found to be fiscally sound because the vendor has been able to provide a substantive proposal for transparency tools that will provide predictive analysis to prospective families and the public.*

13. What are the implications of not approving this Agreement? *Should this agreement not be approved families will be less informed about their odds of placement and make non-informed application decisions for their child.*

Rev: 8/2021

NEW HAVEN PUBLIC SCHOOLS

AGREEMENT
By And Between
The New Haven Board of Education
AND

TetherEd

FOR DEPARTMENT/PROGRAM:

New Haven Federal Magnet Schools Program

This Agreement entered into on the 11th day of October, 2022, effective (*no sooner than the day after Board of Education Approval*), the 15th day of November, 2022, by and between the New Haven Board of Education (herein referred to as the "Board" and, TetherEd, located at, 227 Church Street, New Haven, CT 06510 (herein referred to as the "Contractor".

Compensation: The Board shall pay the contractor for satisfactory performance of services required the amount of $7,500-Virtual School Explorer & Simulator Platform; $7,500-Feedback Suite.

The maximum amount the contractor shall be paid under this agreement: Fifteen thousand dollars (**$15,000**). Compensation will be made upon submission of an itemized invoice which includes a detailed description of work performed and date of service.

Fiscal support for this Agreement shall be by **Federal Magnet 17-22 Central Office C/O Program** of the New Haven Board of Education, **Account Number**: 2517-6258-56694 **Location Code**: 0000.

This agreement shall remain in effect from 11/15/22 to 6/30/23.

SCOPE OF SERVICE: *In the space below, please provide brief summary of service.*

TetherED will provide a Virtual School Explorer tool that allows families to explore school programs operated by NHPS and inform themselves about the different schooling options in New Haven as well as the historic chances of being assigned to the schools they are interested in.

TetherEd's main focus is on optimizing student enrollment by improving the process of application and allocation through the provision of timely and relevant information to support families throughout the process.

*Exhibit A: Scope of Service: Please attach contractor's detailed **Scope of Service** <u>on contractor letterhead</u> with all costs for services including travel and supplies, if applicable.*

Exhibit B: *Student Data Privacy - attached*

Exhibit C: *Contractor's Declaration Attesting to Compliance with Executive Order No. 13G – form must be completed by the contractor. See attached form for contractors who are working with students or staff in school or in after school programs, regardless of location.*

APPROVAL: This Agreement must be approved by the New Haven Board of Education *prior to service start date*. Contactors **may begin service no sooner than the day after** Board of Education approval.

HOLD HARMLESS: The Contractor shall insure and/or indemnify the Board and its members, employees and agents against all claims, suits, and expenses, including reasonable attorney's fees, in connection with loss of life, bodily injury or property damage arising from any neglect act or omission of the Contractor or its employees or agents. Further, the Contractor covenants and agrees that it shall hold the Board and its members, employees and agents harmless against any and all claims, suits judgments of any description whatsoever caused by the Contractor' breach of this agreement or based upon the conduct of the Contractor, or its agents or its employees or arising out of in connection with their activities under this agreement.

TERMINATION: The Board may cancel this agreement for any reason upon thirty (30) days' written notice sent to the Contractor by certified U.S. mail, return receipt requested; provided however, that the Board shall be responsible to the Contractor for all services rendered by the Contractor through the last day of thirty (30) day notice period, as long as the Agreement was approved by the Board prior to the start date of service.

DocuSigned by:

Christopher Neilson

BD2F269A6B6D409

Contractor Signature

President
New Haven Board of Education

10/17/2022

Date

Date

Christopher Neilson

Representante legal

Contractor Printed Name & Title

Revised: 9-27-21

EXHIBIT B

STUDENT DATA PRIVACY AGREEMENT
SPECIAL TERMS AND CONDITIONS

For the purposes of this Exhibit B "directory information," "de-identified student information," "school purposes," "student information," "student records," "student- generated content," and "targeted advertising" shall be as defined by Conn. Gen. Stat.§10-234aa.

1. All student records, student information, and student-generated content (collectively, "student data") provided or accessed pursuant this Agreement or any other services agreement between the Parties are not the property of, or under the control of, the Contractor.

2. The Board shall have access to and the ability to delete student data in the possession of the Contractor except in instances where such data is (A) otherwise prohibited from deletion or required to be retained under state or federal law, or (B) stored as a copy as part of a disaster recovery storage system and that is (i) inaccessible to the public, and (ii) unable to be used in the normal course of business by the Contractor. The Board may request the deletion of any such student information, student records or student- generated content if such copy has been used by the operator to repopulate accessible data following a disaster recovery. The Board may request the deletion of student data by the contractor within two (2) business days of receiving such a request and provide to the Board confirmation via electronic mail that the student data has been deleted in accordance with the request, the date of its deletion, and the manner in which it has been deleted. The confirmation shall contain a written assurance from the Contractor that proper disposal of the data has occurred in order to prevent the unauthorized access or use of student data and that deletion has occurred in accordance with industry standards/practices/protocols.

3. The Contractor shall not use student data for any purposes other than those authorized pursuant to this Agreement.

4. A student, parent or legal guardian of a student may review personally identifiable information contained in student data and correct any erroneous information, if any, in such student data. If the Contractor receives a request to review student data in the Contractor's possession directly from a student, parent, or guardian, the Contractor agrees to refer that individual to the Board and to notify the Board within two (2) business days of receiving such a request. The Contractor agrees to work cooperatively with the Board to permit a student, parent, or guardian to review personally identifiable information in student data that has been shared with the Contractor, and correct any erroneous information therein.

5. The Contractor shall take actions designed to ensure the security and confidentiality of student data.

6. The Contractor will notify the Board, in accordance with Conn. Gen. Stat. § 10-234dd, when there has been an unauthorized release, disclosure or acquisition of student data. Such notification will include the following steps:

   Upon discovery by the Contractor of a breach of student data, the Contractor shall conduct an investigation and restore the integrity of its data systems and, without unreasonable delay, but not more than thirty (30) days after such discovery, shall provide the Board with a more detailed notice of the breach, including but not limited to the date and time of the breach; name(s) of the student{s} whose student data was released, disclosed or acquired; nature of and extent of the breach; and measures taken to ensure that such a breach does not occur in the future.

7. Student data shall not be retained or available to the Contractor upon expiration of the contract between the Contractor and Board, except a student, parent or legal guardian of a student may choose independently to establish or maintain an electronic account with the Contractor after the expiration of such contract for the purpose of storing student- generated content.

8. The Contractor and Board shall each ensure their own compliance with the Family Educational Rights and Privacy Act of 1974, 20 U.S.C. § 1232g, as amended from time to time.

9. The Contractor acknowledges and agrees to comply with the above and all other applicable aspects of Connecticut's Student Data Privacy law according to Connecticut General Statutes §§ 10-234aa through 10-234dd.

10. The Parties agree that this Agreement controls over any inconsistent terms or conditions contained within any other agreement entered into by the Parties concerning student data.

Revised: 10/2/18

TetherEd

New Haven Public Schools
Project Proposal
2022-2024

Scope of Service
Technical and Price Proposal

New Haven, August 22th 2022

Table of Contents

Introduction

An important part of any school choice and enrollment system is the understanding that families have about the options available to them. Equally important for school system administrators is to provide easy-to-use resources so families can learn how the assignment and digital enrollment process works and which factors determine their chances of being admitted at different options. For this reason, many school districts traditionally provide these services through organizing a School Fair or individual school Open House events and disseminate information about the options by publishing printed materials that describe the system and its options. However, empirically, it has been found that in spite of the efforts made by governments to provide information to families about the school choice and enrollment process, many families still participate without all the relevant information.

To address these difficulties, during the last few years, the New Haven Office of School Choice and Enrollment, in partnership with ConsiliumBots and a team of researchers, has built The New Haven Schools of Choice, a virtual platform that helps families learn more about the schools available and their main features (available at https://explore.newhavenmagnetschools.com/).

Our main goal is to help families match with a school of their preference. This is not trivial because of congestion, i.e., there are not enough seats for every student if we try to assign each of them to their first preference. As in many countries, authorities in New Haven address the allocation problem using a centralized mechanism that takes as inputs rank-ordered lists submitted by the families, as well as schools' capacities and priorities. Nevertheless, families tend to: (i) be overly optimistic about their admission chances at some programs and therefore don't search enough for other programs in which they would be willing to enroll—providing feedback about admission chances allows applicants to correct their expectations and take action early in the process—and (ii) not be aware about certain characteristics of the schools they are applying to, such as travel distance, sometimes resulting in a rejection of the assigned seat after the school choice process has ended.

This document aims to describe the services offered by TetherEd, providing continuity to the collaboration that has existed between ConsiliumBots and NHPS. Specifically, our proposal has three main components that may be of interest to the Office of School Choice and Enrollment at New Haven Public Schools. The first is the hosting and continuous support of the **NHPS specific Virtual School Explorer** platform to enable

families to get to know schools in the city from the comfort, convenience, and security of their homes. The second service is an automated application **Communication and Application Feedback Suite** that allows the school choice program administrators to manage questions from the general public and to communicate personalized information to families about their applications and provide relevant information in a timely fashion. Finally, the third service is an **Analytics and Transparency Service** that helps provide parents, school administrators and the broader community access to transparent and easy to interpret data visualization on the application and assignment process.

TetherEd Proposal

TetherEd's proposal seeks to provide a comprehensive solution to the problems and information asymmetries in education faced by both New Haven's families and their public schools administration. The main efforts are focused on optimizing student enrollment by improving the process of application and allocation through the provision of timely and relevant information to support families throughout the process. As shown by the academic literature, it is not enough that the information only exists
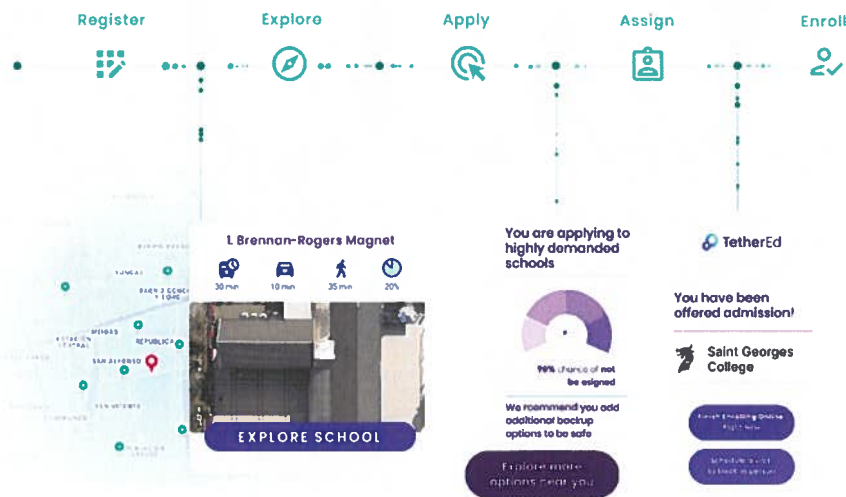
and is available, but it must be delivered in a timely, accessible, and easy manner. Most vulnerable families are precisely those who have the greatest difficulties in accessing information, which limits their opportunities to access better educational alternatives and deepens the gaps that already exist. In this sense, TetherEd's proposal focuses its efforts on reducing opportunity inequalities, contributing to the education system coverage and access for families in New Haven.

The proposal is composed of four themes:
1. **The NHPS Virtual School Explorer**
2. **Communication and Application Feedback Suite**
3. **Analytics and Transparency Service**
4. **Integrated Social Media and Marketing Suite**

1. NHPS Virtual School Explorer

A. Overview

The virtual School Explorer is a virtual platform that aims to encount educational market agents in one single spot. On the one hand, it seeks to provide families a platform to explore options in depth, simulate admissions chances, and see real time availability. At the same time, it gives providers a *low cost* way to share information and show digital content. The School Explorer has been found to be a **crucial tool in helping families to navigate the school choice process.**
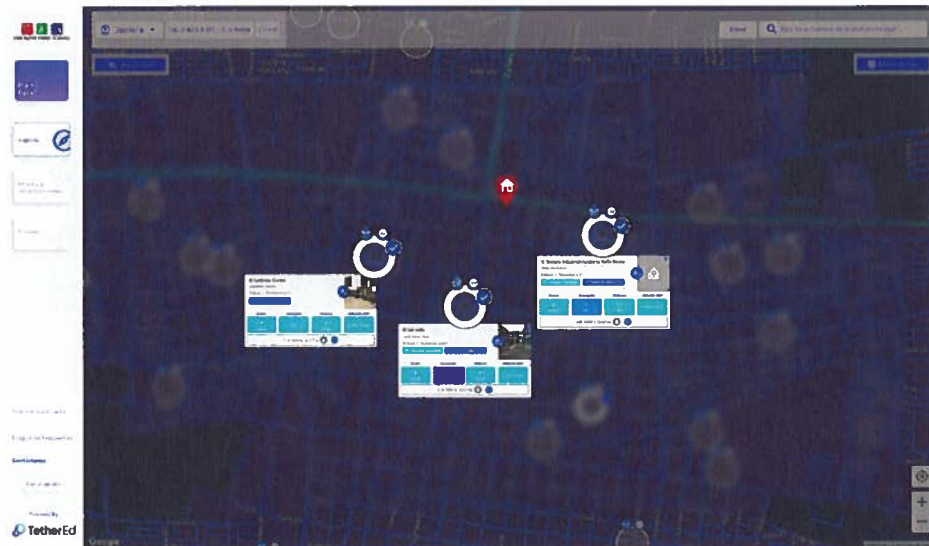
In particular, the virtual school search tool allows families to explore school programs operated by NHPS and inform themselves about the different schooling options in New Haven, as well as the historic chances of being assigned to the schools they are interested in. Individuals can access the School Explorer as guests (without creating an account) or as users (by creating an account using their email) to save their searches and preferences. Users have the option to use their address in order to determine their

neighborhood zone and/or their zipcode priority. If a user does not want to reveal their address, they can still see the chances of admission without these priorities.

By creating an account, users will agree to the platform's terms of service and privacy policy. It should be noted that the only required information to create an account is a valid email address. Optional profile fields include an address and zipcode as mentioned above, as well as a phone number for future outreach by the NHPS. Additionally, users are able to report applicant siblings at specific schools for the purposes of determining sibling priority. Since we want to avoid the use of personally identifiable information (PII), only the sibling's school will be recorded.

B. Related Activities

Components on the proposal for the School Explorer platform are divided as follows:

1. A White Label School Explorer will be provided for NHPS, using its specific branding and logos. This website will be hosted by TetherEd but presented on the NHPS website as a way to allow citizens to explore New Haven educational options focusing on the ones offered by NHPS. In that sense, NHPS will have the chance to centralize the supply and manage the information shown in the webpage themselves.
2. Additional potential improvements will be addressed together with NHPS. For instance, allowing users to log-in with their Google (or other Company) account, or implementing a Back Office administration and dashboard tool for schools so that they can personalize parts of their public profiles message with interested parents, and navigate information displayed in an analytics section, among others.
3. A Virtual profile will be filled, which depends on two types of data requirements:
   a. Publicly available sources about school characteristics, among which any relevant updates will be provided by NHPS such as data from Powerschools, PSIS and Smartchoice.
   b. All digital content created during the setup stage of the platform (principal and teacher spotlight interviews, virtual tours and drone flight video).

4. Regarding the simulator, Anonymous data from previous application processes and access to ConsiliumBots and TetherEd through a Freedom of Information Act (FOIA) request will be required. Specifically, it includes:
    a. Anonymous applications in 2021-2022 application processes, including:
        i. Applicant choices
        ii. Applicant priorities
    b. Shapefiles representations for each of the school zones through which applicants can receive a neighborhood priority.
    c. Address bank that maps all addresses in New Haven to a neighborhood school.

Additionally, the NHPS will allow ConsiliumBots and TetherEd to use the content to be displayed on the platform. Neither ConsiliumBots nor TetherEd will use the digital material on other platforms without the explicit consent of the NHPS. ConsiliumBots will retain the right to use previously approved digital content in the company's own promotional material.

C. Partner Expectations

TetherEd will maintain the school explorer platform in partnership with the NHPS. The NHPS can expect the following:
1. No school programs outside of those operated by the NHPS will be available for exploration in the domain provided by NHPS[1]. None of the PII content shared between the NHPS and TetherEd, nor proprietary NHPS information will be used in other tools without the authorization of the NHPS.
2. TetherEd will consult and obtain clearance from NHPS school choice process administrators via email before any A/B testing of design features of the user interface are conducted.

TetherEd will expect the following from the NHPS:
1. TetherEd will be allowed to use data collected in the platform for the purpose of improving its own tools and showcasing aggregate results. These analyses might result in policy briefs or publications, but will not be linked to any other data shared by the NHPS without the explicit authorization of the NHPS.
2. To implement the School Explorer platform, TetherEd needs to be granted usage access to the de-identified application and assignment data for the relevant school choice processes. TetherEd will submit a data request through the FOIA for the necessary data from the NHPS.

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[1] https://explore.newhavenmagnetschools.com

## 2. Communications and Application Feedback Suite

Leveling the playing field with the right information at the right time.

A. Overview

Centralized application systems can be difficult to understand and navigate. Even in systems that use the non-strategic deferred acceptance (DA) algorithm such as the NHPS, where applicants simply need to list their programs of interest in their true preference order, there are several reasons that can produce suboptimal application portfolios. Implementing a personalized feedback strategy where potential application mistakes are highlighted and explained has the potential of improving applications and consequently the results of the system, as well as correcting the expectations of applicants. Existing research has shown that applicants commit mistakes in a variety of contexts, and that information tools are effective in helping individuals to reduce them.

TetherEd has developed two strategies to address this issue: (1) Risk Pop-Ups; and (2) Personalized feedback reports.

Risk Pop-Ups: Non-assignment risk alerts
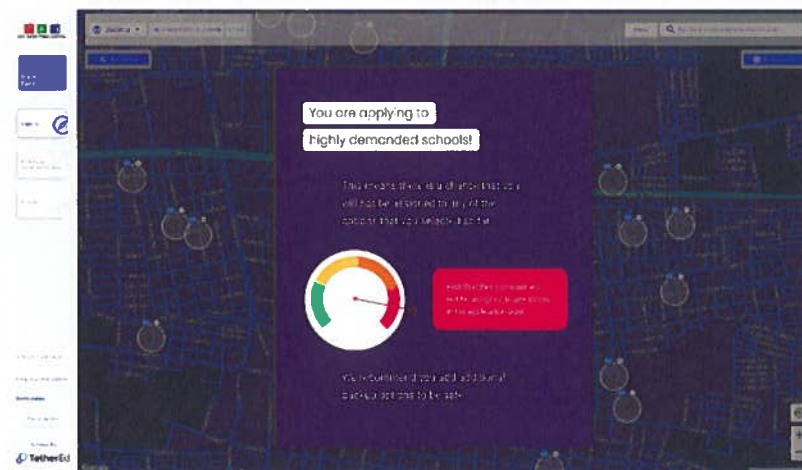
Non-assignment risk alerts (Pop-Ups) are held by an integrated system in the seat request form. The system estimates the probability of being assigned to a school. If this probability is below a given threshold, a message pops up and alerts families, suggesting to add more options to their preferences portfolio. Academic research in Chile and the US has shown that families who are notified of this low probability of allocation tend to increase the number of options in their portfolio, increasing the probability of allocation in one of their choices.

Personalized feedback reports

A virtual assisting tool based on personalized feedback reports that complements the personalized information gained throughout the application process of a family. In particular, the report gathers relevant information regarding the application process such as: (i) application dates; (ii) non-admission risk; (iii) other near-schools recommendations; among others. Typically, the report is sent to families in three moments: before, during and right after the application process finishes.
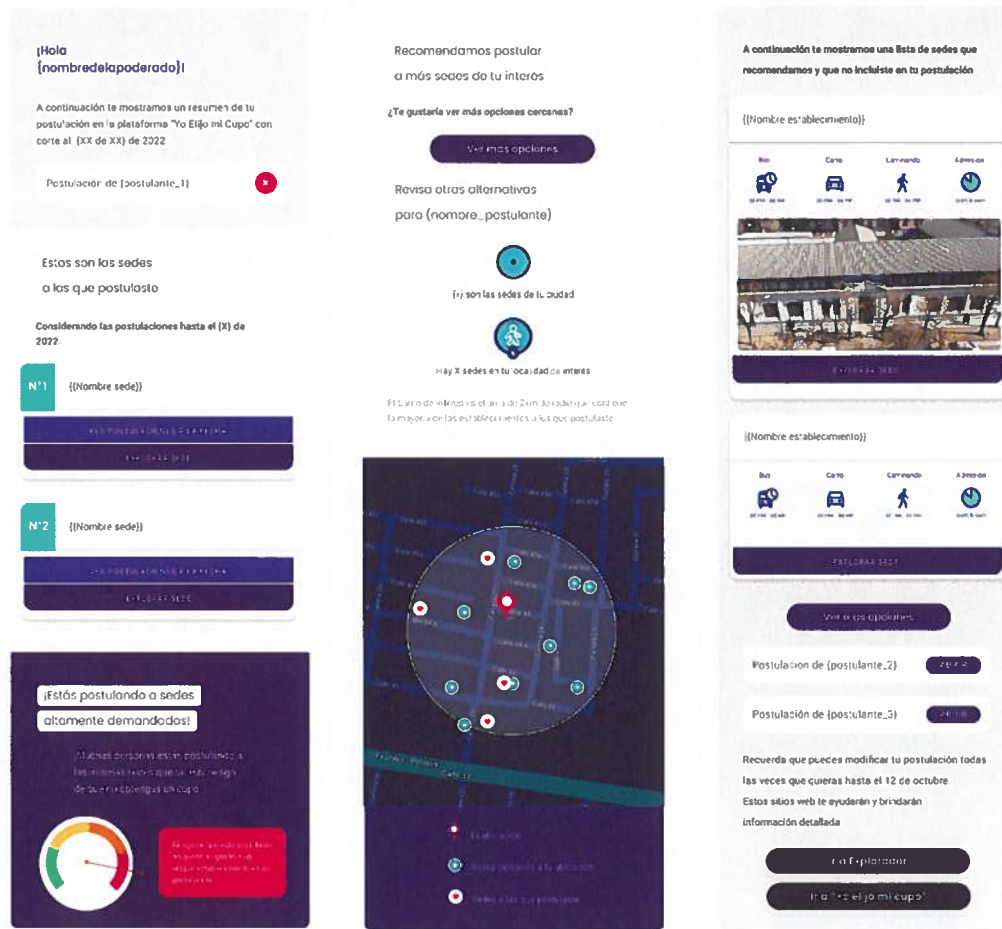
In the case of New Haven, evidence from prior years has shown that applicants have positively reacted to personalized feedback. A natural next step would be to institutionalize that feedback provision strategy, and both ConsiliumBots and TetherEd hope this collaboration to be a step forward in that direction this year.

B. Features

We will first review the outputs that can be generated from processing the partial application data, and then specify the options regarding the outreach strategy.

School recommendations can be provided to applicants who still have available program spaces in their application portfolio. TetherEd's role in the specific recommendation strategy can vary greatly depending on process administrators' goals.

With regard to the implementation of the outreach strategy, we will require the IP address to access Smart Choice[2] so the data processing, production of outreach materials, and implementation of outreach is feasible.

> *TetherEd and ConsiliumBots require the contact information of the applicants (email and phone number) to send the feedback information via email, SMS, and additionally WhatsApp. Given the NHPS application volume, this service is included in the overall services price.*

C. Partners Expectations

To implement feedback TetherEd can direct access to SmartChoice software. Alternatively, a daily data delivery from the NHPS for data regarding the current application process. NHPS can expect TetherEd to periodically produce the information for process administrators and platform users. Additionally, TetherEd could implement additional outreach if so requested.

3. Analytics and Transparency Service

Empowering the community with data and information.

A dashboard is available to administrators and community members. Depending on the settings chosen, the dashboard can provide a series of statistics that will increase transparency and provide data visualization that makes it easier to interpret key information about access to education options.

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[2] Only for the period 2022-2023
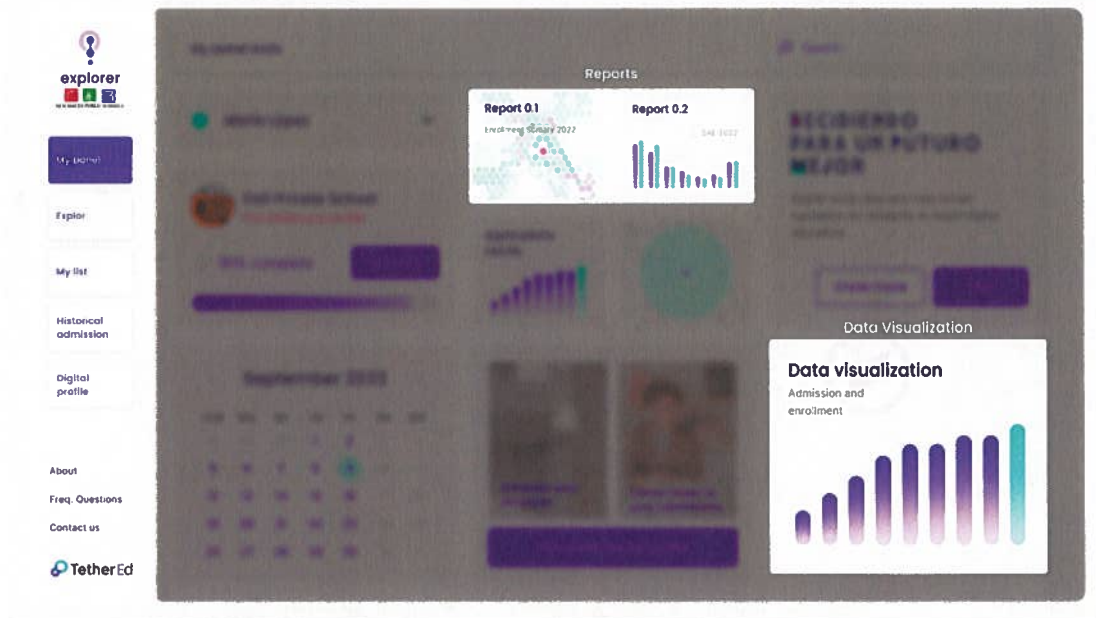
School Report Example

Enrollment Trends Report

Integration to enterprise software providers like PowerSchool, InfiniteCampus and others allows for the visualization of administrative data on past enrollment trends and how these compare to current enrollment. This allows administrators to observe the results in context to overarching trends.

TetherEd

Escuela Particular Salvador Dali

RBD 25279

Flujo de matrícula

Últimos 13 años

El presente informe tiene como objetivo brindar información sobre los principales orígenes más frecuentes de los cuales provienen los estudiantes trasladados, así también como los destinos más comunes de aquellos que se cambian de establecimiento.

Estado histórico de la matrícula
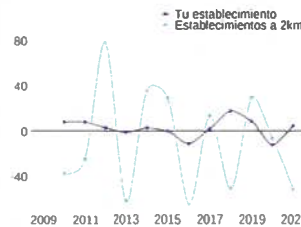
A 2021 el total de matriculados en Kínder fue de:

50	55
2020	2021

Estudiantes

Durante el cambio 2020 - 2021 hubo una ganancia de 5 alumnos.

Movimientos asincrónicos pudiesen sugerir el flujo de estudiantes desde o hacia establecimientos vecinos.

En particular, es posible determinar si la variación de la matrícula fue producto de alumnos que se trasladaron desde o hacia otro establecimiento, o bien a una cohorte de mayor o menor magnitud que la del año anterior.

Para el cambio 2020 - 2021, si descomponemos la ganancia de los 5 alumnos, es posible sugerir que hubo:
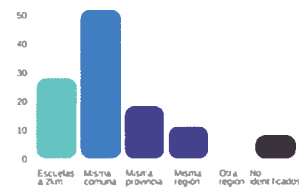
10

Origen de los estudiantes matriculados

En lo últimos 13 años, el total de alumnos matriculados provencientes de otro establecimiento ha sido de:

122

Estudiantes

¿Y de donde provienen estos alumnos?

En donde:

16.4%

Proviene de un establecimiento municipal

81.1%

Proviene de un establecimiento particular subvencionado

1.6%

Analytics Dashboard

School specific statistics about the application process are provided to the community members with permissions set by district administrators. Default settings provide school administrators, teachers and local leadership access to selected statistics about the assignment process.

Product listing and Projected Timeline 2022 - 2023

Activity	Projected Start date	Projected End date
The NHPS Virtual School Explorer		
• Recording Testimonials from key members of the community	Nov 1st, 2022	Feb 24th, 2023
• Collecting information on school features through surveys	Nov 1st, 2022	Jan 27th, 2023
• Updating NHPS Schools of Choice for the 2022-2023 period	Nov 28th, 2022	Jan 23rd, 2023
• Updating Application Simulator	Nov 28th, 2022	Jan 23rd, 2023
• Explorer Launch	Jan 2023	
Feedback Suite		
• Integrating Risk Pop-ups to Smartchoice platform	Jan 9th, 2023	Feb 10th, 2023
• Design of Personalized Feedback Reports	Jan 9th, 2023	Jan 27th, 2023
• Sending Personalized Feedback Reports	Feb 13th, 2023	Mar 6th, 2023*
Analytics and Transparency Service		
• Schools reports		
• Dashboard - Analytics integration		
• Satisfaction survey	Mar 7th, 2023*	Mar 17th, 2023*
• Final report & presentation		April 17th, 2023

Assuming the application period ends on March 6th

Pricing

Per year cost on a three year contract.

Item	Amount
1. The NHPS Virtual School Explorer	$15,000
2. Communications and Application Feedback Suite	$15,000
3. Analytics Dashboard and Transparency Services	$5,000
Total	**$35,000**
Partner Discount	($20,000)
Final Amount	**$15,000**
Optional add on to be determined at a future date	
4. **Integrated Social Media and Marketing Suite**	$10,000

Appendix

Data Security

A more detailed review of how we will use user data and how it will be kept secure can be found in our terms of use and privacy policy documents respectively. Below is a summary:

1. The online tools will be implemented under strict security and performance standards following OWASP guidelines.
2. In the platform, by creating an account users also agree to the platform's terms of service and privacy policy.
3. The only required information to create an account in the platform will be a valid email address; users will be able to also submit their address and phone number, for neighborhood priority and/or zip priority determination, and future outreach by the NHPS respectively.
4. If families provide explicit consent to be contacted in the future, the email data provided by families will be utilized in outreach and information provision efforts exclusively related to the school choice assignment process and tools related to easing access to schooling information.
5. Complete contact data will be provided by TetherEd to NHPS at stipulated dates for platform users that have provided consent. If consent to contact is not provided, the contact data will be destroyed at the end of the school choice process.
6. Any PII data will be encrypted for storage and stored in secure locations.
7. TetherEd will only use PII data for feedback communication purposes.
8. All PII data that was shared to TetherEd by the NHPS will be destroyed in July 2024 school choice process has finished.
9. Anonymous data on usage and application outcomes will be stored and used to provide reports to NHPS, product improvement and broader associated research.

Social Media Campaign