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Virginia M. Barry, Ph.D.
Commissioner of Education
Tel. 603-271-3144

Paul K. Leather
Deputy Commissioner of Education
Tel. 603-271-3801

STATE OF NEW HAMPSHIRE
DEPARTMENT OF EDUCATION
101 Pleasant Street
Concord, N.H. 03301
FAX 603-271-1953
Citizens Services Line 1-800-339-9900

June 17, 2014

Sole Source

Her Excellency, Governor Margaret Wood Hassan
and the Honorable Council
State House
Concord, New Hampshire 03301

Requested Action

Authorize the New Hampshire Department of Education to enter into a **Sole Source** contract with CAST: Center for Applied Special Technology, (vendor code 258305), to provide Professional Learning Services for New Hampshire Educators, upon Governor and Council approval through June 30, 2017 in an amount not to exceed \$260,282.00. 100% Federal Funds.

Funding is available in account titled IDEA Federal Funds, pending legislative approval of the next biennium budget, as follows:

	<u>FY'15</u>	<u>FY'16</u>	<u>FY'17</u>
06-056-56-5625210-411000000-102-500731	\$95,282.00	\$82,500.00	\$82,500.00
Contracts for Programs Services			

Explanation

The New Hampshire Department of Education wishes to contract with CAST under sole source in lieu of the Request for Proposals (RFP) process as CAST is the founder and leading authority for "Universal Design for Learning (UDL)." As the pioneer and a leader in the growing field of UDL, CAST has earned both national and international recognition for its innovative contributions to educational products, classroom practices, and policies. CAST's research and development in UDL puts CAST in the unique position of being able to directly apply its research to instructional practice. CAST has led national efforts to develop federally mandated design and distribution standards for accessible instructional materials (National Instructional Materials Accessibility Standard (NIMAS); Accessible Instructional Materials (AIM)) that will make textbooks accessible to all. These standards are now implemented in all 50 States; with technical assistance provided by CAST lead centers. CAST also leads

Her Excellency, Governor Margaret Wood Hassan
and the Honorable Council
June 17, 2014
Page Two

the U.S. Department of Education's Center on Emerging Technologies to Support Middle School Literacy, and is co-leading with University of Kansas the Center for Online Learning for Students with Disabilities.

The New Hampshire Department of Education would like to contract with the CAST: Center for Applied Special Technology to provide New Hampshire educators with professional customized learning opportunities that build capacity in the implementation and roll out of Universal Design for Learning (UDL) as a systemic framework for educational decision-making. CAST: Center for Applied Special Technology is an education research and development organization that works to expand learning opportunities for all individuals through Universal Design for Learning (UDL). Universal Design for Learning (UDL) is a set of principles for curriculum development that give all individuals equal opportunities to learn.

The CAST Professional Learning team will to work closely with identified New Hampshire districts over a three-year period in order to implement UDL as a systemic approach to improving outcomes for all learners. Universal Design for Learning provides a framework for curriculum design, instructional processes, and assessment that provides all students equal opportunity to learn and demonstrate what they have learned.

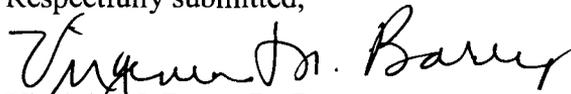
Universal Design is based on three primary principles:

- Multiple means of representation to give diverse learners options for acquiring information.
- Multiple means of action and expression, to provide learners options for demonstrating what they know.
- Multiple means of engagement that taps into learners' interests and increases their motivation to learn.

Most importantly, all learners benefit from UDL including students who are gifted and talented, English language learners, students with physical, cognitive, and/or sensory disabilities, students with emotional or language/learning disabilities, learners who may be a part or more than one of these types of learners and students without disabilities.

In the event that the Federal funds become no longer available, General Funds will not be requested to support this program.

Respectfully submitted,



Virginia M. Barry, Ph.D.
Commissioner of Education

Subject:

PROFESSIONAL LEARNING SERVICES FOR NH EDUCATORS

FORM NUMBER P-37 (version 1/09)

AGREEMENT

The State of New Hampshire and the Contractor hereby mutually agree as follows:

GENERAL PROVISIONS

1. IDENTIFICATION.

1.1 State Agency Name NH State Department of Education, Bureau of Special Ed		1.2 State Agency Address 101 Pleasant Street, Concord, New Hampshire 03301	
1.3 Contractor Name CAST Universal Design for Learning		1.4 Contractor Address 40 Harvard Mills Square, Wakefield, MA 01880-3233	
1.5 Contractor Phone Number 781-245-2212	1.6 Account Number see Exhibit B	1.7 Completion Date June 30, 2017	1.8 Price Limitation \$260,282.00
1.9 Contracting Officer for State Agency Santina Thibedeau, Administrator, Bureau of Special Ed		1.10 State Agency Telephone Number 603-271-6693	
1.11 Contractor Signature <i>Carole Lacy</i>		1.12 Name and Title of Contractor Signatory Carole Lacy, Director of Finance	
1.13 Acknowledgement: State of <u>Massachusetts</u> , County of <u>Middlesex</u> On <u>6/16/14</u> , before the undersigned officer, personally appeared the person identified in block 1.12, or satisfactorily proven to be the person whose name is signed in block 1.11, and acknowledged that s/he executed this document in the capacity indicated in block 1.12.			
1.13.1 Signature of Notary Public or Justice of the Peace [Seal] <i>Mary C. O'Malley</i>			
1.13.2 Name and Title of Notary or Justice of the Peace Mary C. O'Malley			
1.14 State Agency Signature <i>Virginia M. Barry</i>		1.15 Name and Title of State Agency Signatory Virginia M. Barry, Ph.D., Commissioner of Education	
1.16 Approval by the N.H. Department of Administration, Division of Personnel (if applicable) By: _____ Director, On: _____			
1.17 Approval by the Attorney General (Form, Substance and Execution) By: <i>[Signature]</i> On: <u>6/27/14</u>			
1.18 Approval by the Governor and Executive Council By: _____ On: _____			

2. EMPLOYMENT OF CONTRACTOR/SERVICES TO BE PERFORMED. The State of New Hampshire, acting through the agency identified in block 1.1 ("State"), engages contractor identified in block 1.3 ("Contractor") to perform, and the Contractor shall perform, the work or sale of goods, or both, identified and more particularly described in the attached EXHIBIT A which is incorporated herein by reference ("Services").

3. EFFECTIVE DATE/COMPLETION OF SERVICES.
3.1 Notwithstanding any provision of this Agreement to the contrary, and subject to the approval of the Governor and Executive Council of the State of New Hampshire, this Agreement, and all obligations of the parties hereunder, shall not become effective until the date the Governor and Executive Council approve this Agreement ("Effective Date").
3.2 If the Contractor commences the Services prior to the Effective Date, all Services performed by the Contractor prior to the Effective Date shall be performed at the sole risk of the Contractor, and in the event that this Agreement does not become effective, the State shall have no liability to the Contractor, including without limitation, any obligation to pay the Contractor for any costs incurred or Services performed. Contractor must complete all Services by the Completion Date specified in block 1.7.

4. CONDITIONAL NATURE OF AGREEMENT. Notwithstanding any provision of this Agreement to the contrary, all obligations of the State hereunder, including, without limitation, the continuance of payments hereunder, are contingent upon the availability and continued appropriation of funds, and in no event shall the State be liable for any payments hereunder in excess of such available appropriated funds. In the event of a reduction or termination of appropriated funds, the State shall have the right to withhold payment until such funds become available, if ever, and shall have the right to terminate this Agreement immediately upon giving the Contractor notice of such termination. The State shall not be required to transfer funds from any other account to the Account identified in block 1.6 in the event funds in that Account are reduced or unavailable.

5. CONTRACT PRICE/PRICE LIMITATION/PAYMENT.
5.1 The contract price, method of payment, and terms of payment are identified and more particularly described in EXHIBIT B which is incorporated herein by reference.
5.2 The payment by the State of the contract price shall be the only and the complete reimbursement to the Contractor for all expenses, of whatever nature incurred by the Contractor in the performance hereof, and shall be the only and the complete compensation to the Contractor for the Services. The State shall have no liability to the Contractor other than the contract price.
5.3 The State reserves the right to offset from any amounts otherwise payable to the Contractor under this Agreement those liquidated amounts required or permitted by N.H. RSA 80:7 through RSA 80:7-c or any other provision of law.

5.4 Notwithstanding any provision in this Agreement to the contrary, and notwithstanding unexpected circumstances, in no event shall the total of all payments authorized, or actually made hereunder, exceed the Price Limitation set forth in block 1.8.

6. COMPLIANCE BY CONTRACTOR WITH LAWS AND REGULATIONS/ EQUAL EMPLOYMENT OPPORTUNITY.
6.1 In connection with the performance of the Services, the Contractor shall comply with all statutes, laws, regulations, and orders of federal, state, county or municipal authorities which impose any obligation or duty upon the Contractor, including, but not limited to, civil rights and equal opportunity laws. In addition, the Contractor shall comply with all applicable copyright laws.
6.2 During the term of this Agreement, the Contractor shall not discriminate against employees or applicants for employment because of race, color, religion, creed, age, sex, handicap, sexual orientation, or national origin and will take affirmative action to prevent such discrimination.
6.3 If this Agreement is funded in any part by monies of the United States, the Contractor shall comply with all the provisions of Executive Order No. 11246 ("Equal Employment Opportunity"), as supplemented by the regulations of the United States Department of Labor (41 C.F.R. Part 60), and with any rules, regulations and guidelines as the State of New Hampshire or the United States issue to implement these regulations. The Contractor further agrees to permit the State or United States access to any of the Contractor's books, records and accounts for the purpose of ascertaining compliance with all rules, regulations and orders, and the covenants, terms and conditions of this Agreement.

7. PERSONNEL.
7.1 The Contractor shall at its own expense provide all personnel necessary to perform the Services. The Contractor warrants that all personnel engaged in the Services shall be qualified to perform the Services, and shall be properly licensed and otherwise authorized to do so under all applicable laws.
7.2 Unless otherwise authorized in writing, during the term of this Agreement, and for a period of six (6) months after the Completion Date in block 1.7, the Contractor shall not hire, and shall not permit any subcontractor or other person, firm or corporation with whom it is engaged in a combined effort to perform the Services to hire, any person who is a State employee or official, who is materially involved in the procurement, administration or performance of this Agreement. This provision shall survive termination of this Agreement.
7.3 The Contracting Officer specified in block 1.9, or his or her successor, shall be the State's representative. In the event of any dispute concerning the interpretation of this Agreement, the Contracting Officer's decision shall be final for the State.

8. EVENT OF DEFAULT/REMEDIES.

8.1 Any one or more of the following acts or omissions of the Contractor shall constitute an event of default hereunder (“Event of Default”):

- 8.1.1 failure to perform the Services satisfactorily or on schedule;
- 8.1.2 failure to submit any report required hereunder; and/or
- 8.1.3 failure to perform any other covenant, term or condition of this Agreement.

8.2 Upon the occurrence of any Event of Default, the State may take any one, or more, or all, of the following actions:

- 8.2.1 give the Contractor a written notice specifying the Event of Default and requiring it to be remedied within, in the absence of a greater or lesser specification of time, thirty (30) days from the date of the notice; and if the Event of Default is not timely remedied, terminate this Agreement, effective two (2) days after giving the Contractor notice of termination;
- 8.2.2 give the Contractor a written notice specifying the Event of Default and suspending all payments to be made under this Agreement and ordering that the portion of the contract price which would otherwise accrue to the Contractor during the period from the date of such notice until such time as the State determines that the Contractor has cured the Event of Default shall never be paid to the Contractor;
- 8.2.3 set off against any other obligations the State may owe to the Contractor any damages the State suffers by reason of any Event of Default; and/or
- 8.2.4 treat the Agreement as breached and pursue any of its remedies at law or in equity, or both.

9. DATA/ACCESS/CONFIDENTIALITY/PRESERVATION.

9.1 As used in this Agreement, the word “data” shall mean all information and things developed or obtained during the performance of, or acquired or developed by reason of, this Agreement, including, but not limited to, all studies, reports, files, formulae, surveys, maps, charts, sound recordings, video recordings, pictorial reproductions, drawings, analyses, graphic representations, computer programs, computer printouts, notes, letters, memoranda, papers, and documents, all whether finished or unfinished.

9.2 All data and any property which has been received from the State or purchased with funds provided for that purpose under this Agreement, shall be the property of the State, and shall be returned to the State upon demand or upon termination of this Agreement for any reason.

9.3 Confidentiality of data shall be governed by N.H. RSA chapter 91-A or other existing law. Disclosure of data requires prior written approval of the State.

10. TERMINATION. In the event of an early termination of this Agreement for any reason other than the completion of the Services, the Contractor shall deliver to the Contracting Officer, not later than fifteen (15) days after the date of termination, a report (“Termination Report”) describing in detail all Services performed, and the contract price earned, to and including the date of termination. The form, subject matter, content, and number of copies of the Termination

Report shall be identical to those of any Final Report described in the attached EXHIBIT A.

11. CONTRACTOR’S RELATION TO THE STATE. In the performance of this Agreement the Contractor is in all respects an independent contractor, and is neither an agent nor an employee of the State. Neither the Contractor nor any of its officers, employees, agents or members shall have authority to bind the State or receive any benefits, workers’ compensation or other emoluments provided by the State to its employees.

12. ASSIGNMENT/DELEGATION/SUBCONTRACTS. The Contractor shall not assign, or otherwise transfer any interest in this Agreement without the prior written consent of the N.H. Department of Administrative Services. None of the Services shall be subcontracted by the Contractor without the prior written consent of the State.

13. INDEMNIFICATION. The Contractor shall defend, indemnify and hold harmless the State, its officers and employees, from and against any and all losses suffered by the State, its officers and employees, and any and all claims, liabilities or penalties asserted against the State, its officers and employees, by or on behalf of any person, on account of, based or resulting from, arising out of (or which may be claimed to arise out of) the acts or omissions of the Contractor. Notwithstanding the foregoing, nothing herein contained shall be deemed to constitute a waiver of the sovereign immunity of the State, which immunity is hereby reserved to the State. This covenant in paragraph 13 shall survive the termination of this Agreement.

14. INSURANCE.

14.1 The Contractor shall, at its sole expense, obtain and maintain in force, and shall require any subcontractor or assignee to obtain and maintain in force, the following insurance:

14.1.1 comprehensive general liability insurance against all claims of bodily injury, death or property damage, in amounts of not less than \$250,000 per claim and \$2,000,000 per occurrence; and

14.1.2 fire and extended coverage insurance covering all property subject to subparagraph 9.2 herein, in an amount not less than 80% of the whole replacement value of the property.

14.2 The policies described in subparagraph 14.1 herein shall be on policy forms and endorsements approved for use in the State of New Hampshire by the N.H. Department of Insurance, and issued by insurers licensed in the State of New Hampshire.

14.3 The Contractor shall furnish to the Contracting Officer identified in block 1.9, or his or her successor, a certificate(s) of insurance for all insurance required under this Agreement. Contractor shall also furnish to the Contracting Officer identified in block 1.9, or his or her successor, certificate(s) of insurance for all renewal(s) of insurance required under this Agreement no later than fifteen (15) days prior to the expiration date of each of the insurance policies. The certificate(s) of insurance and any renewals thereof shall be

Contractor Initials AR
Date 6-16-14

attached and are incorporated herein by reference. Each certificate(s) of insurance shall contain a clause requiring the insurer to endeavor to provide the Contracting Officer identified in block 1.9, or his or her successor, no less than ten (10) days prior written notice of cancellation or modification of the policy.

15. WORKERS' COMPENSATION.

15.1 By signing this agreement, the Contractor agrees, certifies and warrants that the Contractor is in compliance with or exempt from, the requirements of N.H. RSA chapter 281-A ("*Workers' Compensation*").

15.2 To the extent the Contractor is subject to the requirements of N.H. RSA chapter 281-A, Contractor shall maintain, and require any subcontractor or assignee to secure and maintain, payment of Workers' Compensation in connection with activities which the person proposes to undertake pursuant to this Agreement. Contractor shall furnish the Contracting Officer identified in block 1.9, or his or her successor, proof of Workers' Compensation in the manner described in N.H. RSA chapter 281-A and any applicable renewal(s) thereof, which shall be attached and are incorporated herein by reference. The State shall not be responsible for payment of any Workers' Compensation premiums or for any other claim or benefit for Contractor, or any subcontractor or employee of Contractor, which might arise under applicable State of New Hampshire Workers' Compensation laws in connection with the performance of the Services under this Agreement.

16. WAIVER OF BREACH. No failure by the State to enforce any provisions hereof after any Event of Default shall be deemed a waiver of its rights with regard to that Event of Default, or any subsequent Event of Default. No express failure to enforce any Event of Default shall be deemed a waiver of the right of the State to enforce each and all of the provisions hereof upon any further or other Event of Default on the part of the Contractor.

17. NOTICE. Any notice by a party hereto to the other party shall be deemed to have been duly delivered or given at the time of mailing by certified mail, postage prepaid, in a United States Post Office addressed to the parties at the addresses given in blocks 1.2 and 1.4, herein.

18. AMENDMENT. This Agreement may be amended, waived or discharged only by an instrument in writing signed by the parties hereto and only after approval of such amendment, waiver or discharge by the Governor and Executive Council of the State of New Hampshire.

19. CONSTRUCTION OF AGREEMENT AND TERMS.

This Agreement shall be construed in accordance with the laws of the State of New Hampshire, and is binding upon and inures to the benefit of the parties and their respective successors and assigns. The wording used in this Agreement is the wording chosen by the parties to express their mutual

intent, and no rule of construction shall be applied against or in favor of any party.

20. THIRD PARTIES. The parties hereto do not intend to benefit any third parties and this Agreement shall not be construed to confer any such benefit.

21. HEADINGS. The headings throughout the Agreement are for reference purposes only, and the words contained therein shall in no way be held to explain, modify, amplify or aid in the interpretation, construction or meaning of the provisions of this Agreement.

22. SPECIAL PROVISIONS. Additional provisions set forth in the attached EXHIBIT C are incorporated herein by reference.

23. SEVERABILITY. In the event any of the provisions of this Agreement are held by a court of competent jurisdiction to be contrary to any state or federal law, the remaining provisions of this Agreement will remain in full force and effect.

24. ENTIRE AGREEMENT. This Agreement, which may be executed in a number of counterparts, each of which shall be deemed an original, constitutes the entire Agreement and understanding between the parties, and supersedes all prior Agreements and understandings relating hereto.

EXHIBIT A

Services to be Provided

CAST Universal Design for Learning, will provide the following services under the contract:

Professional Learning Services for New Hampshire Educators

For the period FY'15, effective upon Governor and Council approval through June 30, 2015, FY'16, July 1, 2015 through June 30, 2016 and FY'17 July 1, 2016 through June 30, 2017.

- Provide New Hampshire educators, within eight (8) identified New Hampshire districts with professional customized learning opportunities that build capacity in the implementation and roll out of Universal Design for Learning (UDL) as a systemic framework for educational decision-making.
 - Component 1: Universal Design for Learning (UDL)
 - Planning for Learner Variability
 - Component 2: Universal Design for Learning (UDL) Academy
 - Academy Implementation in Eight Districts / Applying Theory to Practice

Initials 
Date 6-16-14

EXHIBIT B

Budget and Payment Method

General Expenses:

Budget (period ending June 30, 2017)

Account: 06-56-56-562510-41100000-102-500731

Description of Services	FY'15	FY'16	FY'17	Totals
Year 1			\$82,500.00	
Component 1: Universal Design for Learning, Planning for Learner Variability				
Personnel (David Rose, Grace Meo)	\$10,000.00			
Travel and Rental Space	\$2,782.00			
Component 2: Universal Design for Learning, Academy Implementation in Eight Districts				
Personnel (1 Senior Trainer)	\$24,500.00			
Personnel (1 Junior Trainer)	\$20,000.00			
On-line Sessions (6 week course)	\$10,000.00			
Onsite Consultation (1 Senior Trainer)	\$4,000.00			
Remote Consultation (1 Junior Trainer)	\$3,000.00			
On-Site Visits	\$8,000.00			
Travel Expenses	\$13,000.00			
Year 2				
Component 2: Universal Design for Learning, Academy Implementation in Eight Districts				
Personnel (1 Senior Trainer)		\$24,500.00		
Personnel (1 Junior Trainer)		\$20,000.00		
On-line Sessions (6 week course)		\$10,000.00		
Onsite Consultation (1 Senior Trainer)		\$4,000.00		
Remote Consultation (1 Junior Trainer)		\$3,000.00		
On-Site Visits		\$8,000.00		
Travel Expenses		\$13,000.00		
Year 3				
Component 2: Universal Design for Learning, Academy Implementation in Eight Districts				
Personnel (1 Senior Trainer)			\$24,500.00	
Personnel (1 Junior Trainer)			\$20,000.00	
On-line Sessions (6 week course)			\$10,000.00	
Onsite Consultation (1 Senior Trainer)			\$4,000.00	
Remote Consultation (1 Junior Trainer)			\$3,000.00	
On-Site Visits			\$8,000.00	
Travel Expenses			\$13,000.00	
Total	\$95,282.00	\$82,500.00	\$82,500.00	
Grand Total				\$260,282.00

EXHIBIT B (Cont'd)

Budget and Payment Method

Limitation on Price:

Upon mutual agreement between the State contracting officer and the contractor, line items in this budget may be adjusted one to another, with +/- 10% of the indicated amount, in no case shall the total budget exceed the price limitation of \$260,282.00.

Method of Payment:

Payment will be made on the basis of monthly invoices received by the 10th of the following month which are supported by a detailed description of services that have taken place in accordance with the terms of the contract. If otherwise correct and acceptable, payment will be made.

Invoices will be submitted to:

Barbara Raymond
NH Department of Education
Bureau of Special Education
101 Pleasant Street
Concord New Hampshire 03301

Initials CR
Date 6-16-14

EXHIBIT C

None

Initials CH
Date 6-16-14

State of New Hampshire
Department of State

CERTIFICATE

I, William M. Gardner, Secretary of State of the State of New Hampshire, do hereby certify that CAST, Inc., doing business in New Hampshire as Center for Applied Special Technology, a(n) Massachusetts nonprofit corporation, registered to do business in New Hampshire on March 28, 2014. I further certify that it is in good standing as far as this office is concerned, having paid the fees required by law.



In TESTIMONY WHEREOF, I hereto
set my hand and cause to be affixed
the Seal of the State of New Hampshire,
this 16th day of June, A.D. 2014

A handwritten signature in cursive script, appearing to read "William M. Gardner".

William M. Gardner
Secretary of State



40 Harvard Mills Square, Suite 3
Wakefield, MA 01880-3233

T: 781-245-2212
TTY: 781-245-9320
F: 781-245-5212
Email: cast@cast.org
www.cast.org

This is to notify you that in addition to the Co-Presidents, Lisa Poller and Gabrielle Schlichtmann, of CAST, Inc. the following individuals have signature authority for contracts, and other such legal documents than arise out of normal business operations.

Among those authorized to sign for CAST, Inc. are the Director of Finance, Carole Lacy, and any other responsible corporate officer, if one of the above are not available. This would include the Secretary, Treasurer, and Co-Founders of the organization.

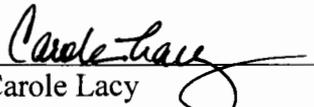
Sincerely,



Gabrielle Schlichtmann, Co-President

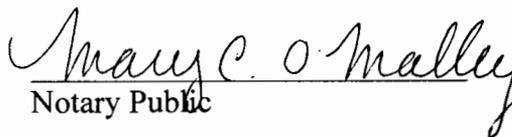


Lisa Poller, Co-President

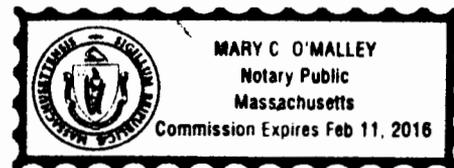


Carole Lacy
Director of Finance

Notarized by:



Notary Public



Sworn to before me on: 6/16/14
Date



Mission Statement:

Founded in 1984, CAST is a not-for-profit, educational research and development organization whose mission is to expand learning opportunities for all individuals, especially those with disabilities and at risk learners, through innovative uses of technology and UDL.

Overview of CAST:

As a pioneer and a leader in the growing field of UDL, CAST has earned international recognition for its innovative contributions to educational products, classroom practices, and policies. CAST fulfills this mission through specific activities in the following areas:

- Research and development of innovative approaches to teaching and learning across the curriculum, including media and materials, and assessment;
- Growing the field of UDL through the development and delivery of guidelines and standards, professional development and technical assistance, and dissemination and outreach;
- Strategic advancement and management activities including, new ventures, resource development, and internal collaboration.

Universal Design for Learning

CAST's principles on Universal Design for Learning (Rose and Meyer, 2002) offer a framework for the design of materials and instructional methods that are useable by a wide range of users. The Universal Design term was adapted from the concept of universal design in architecture, where considerations of physical access for individuals with disabilities are incorporated into the original design, rather than added on as an afterthought. Over the past 25 years, CAST has been applying similar principles to support learning not just access to curriculum. UDL draws on current brain research and new media technologies to respond to individual learner differences. UDL curricula, teaching practices, and policies are inherently flexible and therefore, may have the potential to meet individual learning needs more effectively.

Research and Development

CAST has a well-established track record of successfully managing private and federally funded, multi-year research and development projects with rigor and fidelity through the Institute of Education Sciences (IES), the National Science Foundation (NSF), the Office of Special Education Programs (OSEP), and the National Institutes of Health (NIH). Many of these initiatives are pursued in partnership with universities, publishers, states and school districts, and other R&D organizations. We are conducting research around UDL in a range of areas:

- Learning Sciences including affect, engagement, and motivation; executive function, organization, attention, and working memory;
- Development of UDL media-rich learning environments in literacy, science and math including projects that address the needs of specific disability population

- Assessment both large-scale assessment and instructionally embedded assessment research projects in electronic learning environments and techniques including learning analytics and progress monitoring
- Emerging technologies including, handheld devices, online learning

CAST is also creating a number of authoring platforms to enable educators and curriculum developers to create their own feature-rich curriculum materials based on UDL principles. For example, CAST just released a new open-source authoring system called the UDL Curriculum Toolkit with funding from the National Science Foundation that was originally created for science curriculum but has expanded to support other areas.

Professional Learning

CAST Professional Learning offers many opportunities for educators, teachers, administrators, and organizations to enhance their professional understanding of Universal Design for Learning (UDL), a framework for education design that is based upon cognitive neuroscientific principles. UDL has become the most widely, nationally accepted set of research-to-practice guidelines that enable educators to amplify the learning experience and reach the variability of all learners. Through its mission to make the methods, materials, and assessments of learning flexible and engaging, CAST's Professional Learning offerings provide practitioners with instructional design and teaching strategies to make curriculum more effective. Educators can benefit from a variety of online courses, onsite institutes, and other opportunities to expand and enrich their practice. Administrators can explore UDL and discover implementation strategies that support sustainable change. UDL experts can help pave the way to address system-wide solutions to meet the challenge of reaching the widest variety of learners in the most effective way possible.

National Centers

On a national level, CAST leads the National Center on Universal Design for Learning and is currently leading or a major partner in four national centers funded through the U.S. Department of Education, Office of Special Education Programs including the Center on Emerging Technology to Improve Middle School Literacy for Students with Disabilities (lead, 2012-2017). This research and development center includes partners Vanderbilt University, University of Michigan, SERP Institute and Scholastic. CAST is a partner in the University of Kansas' Center for Online Learning and Students with Disabilities (partner, 2012-2017) which will investigate innovative approaches to improving the success of students with disabilities in online learning environments.

CAST now runs two Centers on the National Instructional Materials Accessibility Standard (NIMAS). The creation of the National Instructional Materials Accessibility Standard (NIMAS) is encouraging publishers toward the rapid creation of accessible digital educational materials

and textbooks. NIMAS, which is now mandated as part of IDEA 2004, will provide the foundation necessary to facilitate the delivery of digital textbook content that can be customized for individual learners. The AIM Center provides technical assistance services to states seeking to improve their systems for the delivery of accessible materials. The NIMAS Center focuses on the continued development of the technical standard.

Catalyzing a Dynamic and Effective UDL Field

Universal Design for Learning is increasingly referenced in education policy briefs, research literature, teacher professional development, and books and articles for educators. The research-based UDL Guidelines provided a strong foundation for the definition of UDL used in the 2008 passage of the Higher Education Opportunity Act. Universal Design for Learning is recommended also in the National Educational Technology Plan released in 2010.

In 2009, CAST established the National Center on Universal Design for Learning (www.udlcenter.org) as a resource for UDL stakeholders – including educators, policymakers, parents, curriculum developers, and publishers – to help them better understand and advocate for UDL. The Center includes a website showcasing UDL tools and techniques and will help stakeholders “make the case” for applying UDL to education, research, publishing, and technology developments. The site also provides a venue to share new ideas, resources and innovative approaches within the field of UDL.

CAST has had a long track record of supporting implementation at the state and district level through professional development. During the 2010-2011 school year, CAST conducted state and district level professional development workshops for 18 school districts in 13 states, including Arkansas, California, Connecticut, Iowa Louisiana, Massachusetts, Maryland, Michigan, Minnesota, , New Jersey, New York Ohio, Pennsylvania and Virginia representing a potential impact on 46,500 educators and 604,314 students.

Products

CAST’s expertise in the universal design of educational technology and its research and development efforts have yielded a number of successful products that support access to the general curriculum. With Scholastic, Inc., CAST developed Wiggeworks®, the first commercially successful mainstream literacy series to use electronic media to make curricula accessible to a wide variety of learners. Tom Synder Productions, a division of Scholastic, released in late 2003 the Thinking Reader®, based on CAST’s research and development. The Thinking Reader is a supported reading environment to support struggling readers using award winning children’s literature. CAST is widely known for its development of Bobby, the premier Internet-based tool that checks websites for accessibility for individuals with disabilities and provides recommendations to correct problems.

The Organization

CAST is a highly collaborative organization that continuously evaluates and refines its work. Executive Leadership includes Founding Directors, David Rose and Anne Meyer, and President Ada Sullivan who provide the core vision and leadership, and a management team with representatives across the organization. CAST's staff provide a wide range of expertise in the fields of education and technology and includes specialists and researchers in education, special education, reading and language arts, learning disabilities, programming, website development, occupational therapy, neuropsychology, speech pathology, engineering, clinical/school psychology, hearing impairment, vision rehabilitation, telecommunications and technology,

CAST has been recognized for its work in universal design and for product development. In 2005, the Thinking Reader (CAST and Tom Snyder Productions) was awarded a Codie for the Software and Information Industry Association. CAST was honored by educational technology industry leaders for "significant positive impact" through the EdNET HERO Award. CAST was also the 1993 winner and a 1999 nominee of the Computerworld Smithsonian Award in the Education and Academia category, a finalist in the 2002 Technology Museum Awards, a finalist in the 1998 SAP/Stevie Wonder Vision Awards in the Vision Pioneer of the Year category.



CAST Board of Directors – Board members do not receive compensation.

Chair:

Stephen P. Crosby

Directors:

Sheldon H. Berman

David Flink

Anne Meyer

Curtis Richards

David H. Rose

Anne E. Schneider

Logan Smalley

Deborah P. Waber

Richard Weissbourd

Jim Williamson

Markay L. Winston

Paul Yellin

M F A

MODDY, FAMIGLETTI & ANDRONICO
Certified Public Accountants & Consultants

CAST, INC.

**FINANCIAL STATEMENTS AND REPORTS
REQUIRED FOR AUDITS IN ACCORDANCE
WITH GOVERNMENT AUDITING
STANDARDS AND OMB CIRCULAR A-133**

SEPTEMBER 30, 2013 AND 2012

Proactive CPA and Consulting Firm

To the Board of Directors
CAST, Inc.
Wakefield, Massachusetts

INDEPENDENT AUDITORS' REPORT

We have audited the accompanying financial statements of CAST, Inc. (the "Organization"), which comprise the statements of financial position as of September 30, 2013 and 2012, and the related statements of activities, functional expenses and cash flows for the years then ended, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditors consider internal control relevant to the Organization's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of CAST, Inc. as of September 30, 2013 and 2012, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Other Reporting Required by the Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report dated January 31, 2014 on our consideration of CAST, Inc.'s internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on internal control over financial reporting or on compliance. The report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Organization's internal control over financial reporting and compliance.

Report on Schedule of Expenditures of Federal Awards Required by OMB Circular A-133

Our audits were conducted for the purpose of forming an opinion on the financial statements as a whole. The accompanying schedule of expenditures of federal awards, as required by U.S. Office of Management and Budget Circular A-133, *Audits of States, Local Governments, and Non-Profit Organizations*, is presented for purposes of additional analysis and is not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated, in all material respects, in relation to the financial statements as a whole.

Moody, Famiglietti & Andronico, LLP

Moody, Famiglietti & Andronico, LLP
Tewksbury, Massachusetts
January 31, 2014

Statements of Financial Position
CAST, Inc.

September 30	2013	2012
Assets		
Current Assets:		
Cash and Equivalents	\$ 3,591,151	\$ 3,083,282
Accounts Receivable	616,865	726,239
Current Portion of Pledges Receivable	77,485	4,218
Prepaid Expenses	82,018	99,652
Total Current Assets	4,367,519	3,913,391
Endowment	64,847	64,847
Investments	1,318,138	1,216,998
Pledges Receivable, Net of Current Portion	49,074	-
Property and Equipment, Net of Accumulated Depreciation	369,137	167,008
Security Deposit	20,150	20,150
Total Assets	\$ 6,188,865	\$ 5,382,394
Liabilities and Net Assets		
Current Liabilities:		
Line of Credit	\$ -	\$ -
Accounts Payable	93,167	62,308
Accrued Expenses	445,930	414,458
Customer Deposits	190,722	36,996
Total Current Liabilities	729,819	513,762
Deferred Rent	14,164	-
Total Liabilities	743,983	513,762
Net Assets:		
Unrestricted	4,921,087	4,467,431
Temporarily Restricted	458,948	336,354
Permanently Restricted	64,847	64,847
Total Net Assets	5,444,882	4,868,632
Total Liabilities and Net Assets	\$ 6,188,865	\$ 5,382,394

The accompanying notes are an integral part of these financial statements.

For the Years Ended September 30	2013	2012
Changes in Unrestricted Net Assets:		
Unrestricted Revenues, Gains and Other Support:		
Federal Contract Revenue	\$ 5,236,114	\$ 3,261,828
Consulting Revenue	1,747,481	2,031,228
Net Assets Released from Restriction	438,188	1,534,591
Contributions and Grants	388,665	440,221
Royalties	82,502	80,071
Interest and Dividends	959	1,147
Total Unrestricted Revenues, Gains and Other Support	7,893,909	7,349,086
Expenses:		
Program Services:		
Federal R&D Projects	3,594,504	2,048,698
Foundation R&D projects	389,700	1,432,753
Consulting and Educational Tools	953,648	1,095,254
Federal Sub-Recipient Contractual Agreements	480,184	451,759
Knowledge Dissemination	99,434	124,918
Total Program Services	5,517,470	5,153,382
Supporting Services:		
General and Administrative	1,733,302	1,471,650
Fundraising	189,481	127,077
Total Supporting Services	1,922,783	1,598,727
Total Expenses	7,440,253	6,752,109
Increase in Unrestricted Net Assets	453,656	596,977
Changes in Temporarily Restricted Net Assets:		
Temporarily Restricted Contributions and Grants	560,782	1,087,117
Net Assets Released from Restriction	(438,188)	(1,534,591)
Increase (Decrease) in Temporarily Restricted Net Assets	122,594	(447,474)
Increase in Net Assets	576,250	149,503
Net Assets, Beginning of Year	4,868,632	4,719,129
Net Assets, End of Year	<u>\$ 5,444,882</u>	<u>\$ 4,868,632</u>



For the Year Ended September 30

2013

	Program Services					Supporting Services			Total
	Federal R&D Projects	Foundation R&D Projects	Consulting and Educational Tools	Federal Sub-Recipient Contractual Agreements	Knowledge Dissemination	General and Administrative	Fundraising	Total	
Salaries and Related Benefits	\$ 2,240,670	\$ 284,074	\$ 747,370	\$ 411,419	\$ 63,866	\$ 1,215,467	\$ 152,264	\$ 5,115,130	
Consultants	296,212	43,037	101,200	1,524	16,145	87,969	13,922	560,009	
Programmers	414,390	21,850	5,250	2,771	3,600	2,000	-	449,861	
Occupancy	166,015	17,621	62,391	29,414	2,994	81,851	8,961	369,247	
Subcontractors	296,598	-	-	-	-	-	-	296,598	
Travel	117,431	15,131	21,242	31,969	5,529	21,996	6,393	219,691	
Depreciation	-	-	-	-	-	89,947	-	89,947	
Computer Expenses	41,229	-	243	1,013	-	14,876	2,667	60,028	
Office Expenses	2,678	601	3,065	48	6	49,504	-	55,902	
Program and Office Supplies	3,497	1,121	5,872	16	4,319	35,395	355	50,575	
Telecommunications	2,800	-	1,552	76	-	46,110	-	50,538	
Dues and Publications	7,332	5,997	5,062	99	2,970	13,242	4,906	39,608	
Repairs and Maintenance	-	-	-	-	-	33,022	-	33,022	
Professional Fees	-	-	-	-	-	27,235	-	27,235	
Insurance	-	-	-	-	-	7,905	-	7,905	
Conference and Fees	4,398	199	-	1,822	-	249	-	6,668	
Postage	684	69	401	13	5	2,034	13	3,219	
Advertising	570	-	-	-	-	2,208	-	2,778	
Equipment Rental	-	-	-	-	-	2,292	-	2,292	
Total Expenses	\$ 3,594,504	\$ 389,700	\$ 953,648	\$ 480,184	\$ 99,434	\$ 1,733,302	\$ 189,481	\$ 7,440,253	

The accompanying notes are an integral part of these financial statements.

Statements of Functional Expenses (Continued)

CAST, Inc.

For the Year Ended September 30

2012

	Program Services						Supporting Services			Total
	Federal R&D Projects	Foundation R&D Projects	Consulting and Educational Tools	Federal Sub-Recipient Contractual Agreements	Knowledge Dissemination	Total Program Services	General and Administrative	Fundraising		
Salaries and Related Benefits	\$ 1,387,300	\$ 876,915	\$ 746,588	\$ 400,065	\$ 95,296	\$ 3,506,164	\$ 1,074,718	\$ 90,059	\$ 4,670,941	
Consultants	172,885	275,131	143,416	575	8,816	600,823	25,944	26,666	653,433	
Programmers	22,899	151,515	82,153	8,816	4,175	269,558	3,700	-	273,258	
Occupancy	97,549	58,800	53,672	28,632	4,879	243,532	69,590	5,199	318,321	
Subcontractors	212,144	-	-	-	-	212,144	-	-	212,144	
Travel	122,644	36,850	55,331	11,957	7,227	234,009	26,926	370	261,305	
Depreciation	-	-	-	-	-	-	64,791	-	64,791	
Computer Expenses	5,891	24,831	438	202	-	31,362	15,234	-	46,596	
Office Expenses	690	1,774	3,445	-	194	6,103	37,603	-	43,706	
Program and Office Supplies	8,521	2,695	7,191	155	998	19,560	12,100	199	31,859	
Telecommunications	6,499	325	1,190	360	-	8,374	43,669	-	52,043	
Dues and Publications	5,247	3,033	1,455	64	2,969	12,768	7,561	3,924	24,253	
Repairs and Maintenance	-	-	-	-	-	-	30,240	-	30,240	
Professional Fees	-	-	-	-	-	-	47,194	-	47,194	
Insurance	-	-	-	-	-	-	7,502	-	7,502	
Conference and Fees	5,955	794	86	928	286	8,049	300	-	8,349	
Postage	474	90	289	5	78	936	1,581	-	2,517	
Advertising	-	-	-	-	-	-	705	660	1,365	
Equipment Rental	-	-	-	-	-	-	2,292	-	2,292	
Total Expenses	\$ 2,048,698	\$ 1,432,753	\$ 1,095,254	\$ 451,759	\$ 124,918	\$ 5,153,382	\$ 1,471,650	\$ 127,077	\$ 6,752,109	

The accompanying notes are an integral part of these financial statements.

For the Years Ended September 30	2013	2012
Cash Flows from Operating Activities:		
Increase in Net Assets	\$ 576,250	\$ 149,503
Adjustments to Reconcile Increase in Net Assets to Net Cash Provided by Operating Activities:		
Non Cash Contributions	(100,807)	(112,358)
Loss on Disposal of Property and Equipment	3,584	1,903
Depreciation	89,947	64,791
Decrease (Increase) in Accounts Receivable	109,374	(138,170)
(Increase) Decrease in Pledges Receivable	(122,341)	238,620
Decrease (Increase) in Prepaid Expenses	17,634	(34,140)
Increase in Accounts Payable	30,859	6,044
Increase in Accrued Expenses	31,472	61,013
Increase (Decrease) in Customer Deposits	153,726	(276,305)
Increase in Deferred Rent	14,164	-
Net Cash Provided by Operating Activities	803,862	(39,099)
Cash Flows from Investing Activities:		
Purchase of Property and Equipment	(295,660)	(73,220)
Purchase of Investments	(333)	(504)
Proceeds from Sale of Investments	-	112,358
Net Cash Used in Investing Activities	(295,993)	38,634
Net Increase (Decrease) in Cash and Equivalents	507,869	(465)
Cash and Equivalents, Beginning of Year	3,083,282	3,083,747
Cash and Equivalents, End of Year	<u>\$ 3,591,151</u>	<u>\$ 3,083,282</u>

Supplemental Disclosure of Non-Cash Investing Activities:

During the years ended September 30, 2013 and 2012, the Organization disposed of property and equipment with a cost basis of \$78,915 and \$17,724, respectively.

During the year ended September 30, 2013 and 2012, the Organization received donated marketable equity securities with a fair value of \$100,807 and \$112,358, respectively, as of the donation date.

1. Organization and Significant Accounting Policies:

Reporting Entity: Founded in 1984, CAST, Inc. ("CAST" or the "Organization") is a nonprofit educational research organization located in Wakefield, Massachusetts, whose mission is to expand learning opportunities for individuals with disabilities through innovative use of technology. CAST's staff includes specialists in education, special education, reading and language arts, learning disabilities, neuropsychology, vision rehabilitation, hearing impairment, curriculum design, web development, and programming.

Method of Accounting: The financial statements of the Organization have been prepared using the accrual basis of accounting in accordance with accounting principles generally accepted in the United States of America (GAAP).

Classification and Reporting of Net Assets: The Organization reports information regarding its financial position and activities according to three classes of net assets: unrestricted net assets; temporarily restricted net assets; and permanently restricted net assets. A description of the three net asset classes follows:

- Unrestricted net assets represent the portion of net assets of the Organization that is neither permanently restricted nor temporarily restricted by donor-imposed stipulations. As of September 30, 2013 and 2012, the Board of Directors designated net assets of \$341,400 and \$608,399, respectively, for reserves and special projects. The use of these designated net assets must be approved by the Board of Directors.
- Temporarily restricted net assets represent contributions and other inflows of assets whose use by the Organization is limited by donor-imposed stipulations that either expire by passage of time or can be fulfilled and removed by actions of the Organization pursuant to those stipulations.
- Permanently restricted net assets represent contributions and other inflows of assets whose use by the Organization is limited by donor-imposed stipulations that neither expire by passage of time nor can be fulfilled or otherwise removed by actions of the Organization.

Cash and Equivalents: The Organization maintains its cash in bank deposit accounts, which at times, may exceed federally insured limits. The Organization has

not experienced any losses in such accounts and therefore believes it is not exposed to any significant risks on cash and equivalents. The Organization considers highly liquid investments with original maturities of three months or less when purchased to be cash equivalents.

Investments and Investment Income: Investments are reported at fair value as of the date of the statements of financial position. Realized and unrealized gains and losses are reflected in the accompanying statements of activities.

Concentration of Credit Risk: Financial instruments that potentially subject the Organization to concentration of credit risk consist primarily of cash, cash equivalents, investments, accounts receivable and pledges receivable. The Organization maintains its cash, cash equivalents, and investments with high-credit quality financial institutions. Accounts receivable are stated at the amount management expects to collect from outstanding balances. An allowance for uncollectible pledges receivable is provided based upon management's judgment of potential defaults. The determination includes such factors as prior collection history, type of contribution and nature of fund raising activities. There was no allowance for doubtful receivables as of September 30, 2013 and 2012.

Endowment: The Board of Directors has interpreted the laws as requiring the preservation of the fair value of the original gift as of the gift date of the donor-restricted endowment funds absent explicit donor stipulations to the contrary.

Permanently restricted net assets have been reflected to consist of the original value of the gifts donated to the permanent endowment at the date of gift plus any accumulations to the permanent endowment made in accordance with the applicable donors' explicit directions. Any excess donor-restricted endowment fund above the designated balance is classified as temporarily restricted net assets until those amounts are appropriated for expenditure by the Organization in a manner considered to be prudent under current Massachusetts state law. From time to time, the fair value of assets associated with individual donor-restricted endowment funds may fall below the level that the donor requires the Organization to retain as a fund of perpetual duration. Deficiencies of this nature would be reported in unrestricted net assets.

1. Organization and Significant Accounting Policies (Continued):

Fair Value: The framework for measuring fair value provides a fair value hierarchy that prioritizes the inputs to valuation techniques used to measure fair value. The hierarchy gives the highest priority to unadjusted quoted prices in active markets for identical assets or liabilities (Level 1 measurements) and the lowest priority to unobservable inputs (Level 3 measurements).

The three levels of the fair value hierarchy are described as follows:

Level 1 - Inputs to the valuation methodology are unadjusted quoted prices for identical assets or liabilities in active markets that the Organization has the ability to access.

Level 2 - Inputs to the valuation methodology include:

- Quoted prices for similar assets or liabilities in active markets;
- Quoted prices for identical or similar assets or liabilities in inactive markets;
- Inputs other than quoted prices that are observable for the asset or liability; and
- Inputs that are derived principally from or corroborated by observable market data by correlation or other means.

If the asset or liability has a specified (contractual) term, the Level 2 input must be observable for substantially the full term of the asset or liability.

Level 3 - Inputs to the valuation methodology are unobservable and significant to the fair value measurement.

The asset or liability's fair value measurement level within the fair value hierarchy is based on the lowest level of any input that is significant to the fair value measurement. Valuation techniques maximize the use of observable inputs and minimize the use of unobservable inputs.

Property and Equipment: Property and equipment are stated at cost on the date of acquisition, or at fair value on the date of donation. Depreciation is computed

using the straight-line method over the estimated useful lives of the related assets, which are as follows:

Leasehold Improvements	Life of Lease
Office Equipment	5 Years
Furniture and Fixtures	4 - 7 Years
Software	3 Years

Deferred Rent: The Organization records rent expense on a constant periodic rate over the term of the lease agreement. The excess of the cumulative rent expense incurred over the cumulative amounts due under the lease agreement is deferred and recognized over the term of the lease.

Revenue Recognition: Revenues are reported as increases in unrestricted net assets unless use of the related assets is limited by donor-imposed restrictions. Gains and losses on investments and other assets or liabilities are reported as increases or decreases in unrestricted net assets unless their use is restricted by explicit donor stipulation or by law.

The Organization generates consulting revenues from the sale of professional services. The Organization also generates royalty revenue from the licensing of rights to certain computer software. Revenues are recognized when persuasive evidence of an agreement exists, delivery of the services has occurred, the fee is fixed and determinable and collectability is probable. Customer deposits represent payments received for which the aforementioned revenue recognition criteria have not been met.

The Organization provides services under a variety of third-party agreements, many of which provide for current payment on a provisional basis, subject to cost reports and audits by the respective contracting parties.

Contributions and Pledge Receivables: Contributions, including unconditional promises to give, are recognized as revenue in the period the promise is ("pledged") received. Conditional promises to give are not recognized until they become unconditional, that is at the time when the conditions on which they depend are substantially met. Contributions of assets other than cash are reported at their estimated fair value. Pledge receivables to be received after one year are discounted at an appropriate discount rate commensurate with the risk involved. Amortization of the discount is recorded as additional contribution revenue in accordance with donor-imposed restrictions, if any, on the contributions.

1. Organization and Significant Accounting Policies (Continued):

Contributions recognized with donor-imposed restrictions that are met in the same year as recognized are reported as revenues of the temporarily restricted net asset class. Contributions received with donor-imposed restrictions that are met subsequent to the year in which they are recognized are also reported as revenues of the temporarily restricted net asset class when they are recognized. A reclassification to unrestricted net assets is made to reflect the expiration of such restrictions in the year the restriction is met.

Endowment income earned on permanently restricted net assets that is earned and expended in the same year in accordance with donor-designated restrictions is reported as revenue of the temporarily net asset class in the statements of activities. Contributions of donated services are reported as revenues and expenses of the unrestricted net asset class at the fair value of the service received only if the services create or enhance a nonfinancial asset or would typically need to be purchased by the Organization if they had not been provided by individuals with those skills. Contributions of goods and space to be used in program operations are reported as revenues and expenses of the unrestricted net asset class at the time the goods or space is received.

Income Taxes: The Organization is a nonprofit corporation as described in Section 501(c)(3) of the Internal Revenue Code and is exempt from federal and state income taxes on trade or business profits generated by activities related to the Organization's exempt function. The Organization may be subject to federal and state income taxes for profits generated from unrelated trade or business income. The Organization has determined that it does not have any liabilities associated with unrelated trade or business income and, as a result, no provision for income taxes is presented in the accompanying financial statements.

The Organization assesses the recording of uncertain tax positions by evaluating the minimum recognition threshold and measurement requirements a tax position must meet before being recognized as a benefit in the financial statements. The Organization's policy is to recognize interest and penalties accrued on any uncertain tax positions as a component of income tax expense, if any, in its statements of activities.

The Organization has not recognized any liabilities for uncertain tax positions or unrecognized benefits as of September 30, 2013 or 2012. The Organization does not expect any material change in uncertain tax positions within the next twelve months.

As of September 30, 2013, the Organization is not under examination by any taxing authorities and is generally open for examination for three years from the date of filing.

Use of Estimates: The Organization has used estimates and assumptions relating to the reporting of assets and liabilities and the disclosure of contingent assets and liabilities in its preparation of the financial statements in accordance with accounting principles generally accepted in the United States of America (GAAP). Actual results experienced by the Organization may differ from those estimates.

Subsequent Events: Management has evaluated subsequent events spanning the period from September 30, 2013 through January 31, 2014, the latter representing the issuance date of these financial statements.

2. Pledges Receivable:

Pledges receivable as of September 30, 2013 and 2012 consist of the following:

	2013	2012
Receivable in Less than One Year	\$ 77,485	\$ 4,218
Receivable in One to Five Years	49,074	-
	<u>\$ 126,559</u>	<u>\$ 4,218</u>

Long-term pledges receivable have not been discounted, as the effect of the discount would be immaterial to the financial statements as a whole.

3. Donated Goods and Services:

The Organization receives donated goods and services relating to administrative expenses. The estimated fair value for goods and services is determined by the donor or by management. During the years ended September 30, 2013 and 2012, the Organization received donated legal services in the amounts of \$2,890 and \$16,694, respectively.

4. Investments and Endowment:

Investments: Investments as of September 30, 2013 and 2012 consist of money market funds that are stated at fair value and have been measured using quoted market prices in active markets, a Level 1 observable input. As of September 30, 2013 and 2012, fair value of the money market funds totaled \$1,318,138 and \$1,216,998, respectively. During the years ended September 30, 2013 and 2012, there were no realized gains (losses) on these investments.

Endowment: The endowment consists of investments, referred to as trust funds, which have been permanently restricted as to their use by the donor or law.

Endowment as of September 30, 2013 and 2012 consists of money market funds that are stated at fair value and have been measured using quoted market prices in active markets, a Level 1 observable input. As of September 30, 2013 and 2012, the fair value of the money market funds totaled \$64,847 and was permanently restricted.

During the years ended September 30, 2013 and 2012, there were no realized gains (losses) on the endowment. The changes in the endowment balance by net asset classification as of September 30, 2013 and 2012 consists of the following:

	Temporarily Restricted	Permanently Restricted	Total
Endowment Balance, September 30, 2011	\$ -	\$ 64,847	\$ 64,847
Investment Returns:			
Interest and Dividend Income	20	-	20
Total Investment Returns	<u>20</u>	<u>-</u>	<u>20</u>
Appropriation of Endowment Assets for Donor-Designated Expenditures	<u>(20)</u>	<u>-</u>	<u>(20)</u>
Endowment Balance, September 30, 2012	-	64,847	64,847
Investment Returns:			
Interest and Dividend Income	16	-	16
Total Investment Returns	<u>16</u>	<u>-</u>	<u>16</u>
Appropriation of Endowment Assets for Donor-Designated Expenditures	<u>(16)</u>	<u>-</u>	<u>(16)</u>
Endowment Balance, September 30, 2013	<u>\$ -</u>	<u>\$ 64,847</u>	<u>\$ 64,847</u>

5. Property and Equipment:

Property and equipment as of September 30, 2013 and 2012 consists of the following:

	2013	2012
Leasehold Improvements	\$ 686,266	\$ 585,571
Office Equipment	558,818	562,003
Furniture and Fixtures	239,198	165,343
Software	164,064	118,684
	<u>1,648,346</u>	<u>1,431,601</u>
Less: Accumulated Depreciation	<u>1,279,209</u>	<u>1,264,593</u>
	<u>\$ 369,137</u>	<u>\$ 167,008</u>

During the years ended September 30, 2013 and 2012, depreciation expense amounted to \$89,947 and \$64,791, respectively.

6. Line of Credit:

The Organization has a \$500,000 line of credit agreement with a bank, subject to annual renewal by the bank on March 31, with interest equal to the bank's base lending rate (3.99% at September 30, 2013 and 2012). The line of credit is secured by all assets of the Organization. There was no outstanding balance under this line of credit agreement as of September 30, 2013 and 2012.

This line of credit agreement contains financial covenants with which the Organization is required to comply. The Organization was in compliance with the above covenants as of September 30, 2013.

7. Temporarily Restricted Net Assets:

Temporarily restricted net assets, as of September 30, 2013 and 2012, include unexpended contributions and grants temporarily restricted by donors for the following purposes:

	2013	2012
Purpose and Time Restricted:		
Program:		
Parent Website	\$ 395,975	\$ -
UDL Learning	28,468	90,000
UDL Book	22,505	-
Reading Tools Implementation	12,000	-
	-	242,136
	<u>458,948</u>	<u>332,136</u>
Time Restricted:		
General Support	-	4,218
	<u>\$ 458,948</u>	<u>\$ 336,354</u>

8. Permanently Restricted Net Assets:

Permanently restricted net assets totaling \$64,847 as of September 30, 2013 and 2012, represent contributions for the Borghi Endowment Fund of \$13,632 and the Elspeth Sladden Teacher Education Fund, in the amount of \$51,215, whose principal have been permanently restricted by donors. Gains generated from the Borghi Endowment Fund may be used for web-based programs. Gains generated from the Elspeth Sladden Teacher Education Fund may be used for general operations of the various programs.

9. Net Assets Released from Restrictions:

Net assets were released from donor restrictions by incurring expenses satisfying the restricted purposes specified by donors or by the passage of time. Net assets released from restriction during the years ended September 30, 2013 and 2012 consist of the following:

	2013	2012
Implementation	\$ 242,136	\$ 557,623
UDL Book	118,302	122,358
UDL Learning	61,532	-
Reading Tools	8,000	-
General Support	4,218	13,327
Parent Website	4,000	-
Next Generation Learning Challenges	-	211,041
Working Memory	-	185,293
eKits/LessonBuilder	-	172,227
Planning Grant	-	107,482
Innovation/Capacity	-	56,155
Marketing	-	50,000
Research	-	49,085
UDL Journal	-	10,000
	<u>\$ 438,188</u>	<u>\$ 1,534,591</u>

10. Operating Leases:

The Organization is party to an operating lease for office space in Wakefield, Massachusetts, with an original expiration date of October 2012. Under the terms of the lease agreement, the Organization is required to remit monthly rental payments in the amount of \$23,060 through the remaining term of the lease. The lease was amended to extend the term of the agreement through October 2017 and increase monthly rental payments to \$27,148, with certain escalation clauses. Rent expense incurred by the Organization under this lease agreement amounted to \$369,247 and \$318,321, for the years ended September 30, 2013 and 2012, respectively.

The Organization leases certain equipment under an operating lease. The lease agreement expires in December 2017. Equipment rent expense incurred by the Organization amounted to \$2,292 for the years ended September 30, 2013 and 2012, respectively.

Future minimum rental payments due under these noncancelable lease agreements as of September 30, 2013 are as follows:

<u>Year Ended</u> <u>September 30,</u>	
2014	\$ 320,987
2015	324,921
2016	336,725
2017	340,659
2018	85,165
	<u>\$ 1,408,457</u>

11. Retirement and Fringe Benefits:

The Organization sponsors an IRC Section 403(b) plan to eligible employees, which allows participants to defer a portion of their salaries into a variety of investment options. The plan is for employee salary deferrals only, not to exceed the legal limit. The Organization makes a matching contribution to the plan each year up to 10% of all participants' compensation. Total expenses related to this plan amounted to \$272,908 and \$250,521 for the years ended September 30, 2013 and 2012, respectively.

12. Commitments and Contingencies:

Indemnifications: In the ordinary course of business, the Organization enters into various agreements containing standard indemnification provisions. The Organization's indemnification obligations under such provisions are typically in effect from the date of execution of the applicable agreement through the end of the applicable statute of limitations. The aggregate maximum potential future liability of the Organization under such indemnification provisions is uncertain. As of September 30, 2013 and 2012, no amounts have been accrued related to such indemnification provisions.

Contingencies: From time to time, the Organization is included in legal and administrative proceedings and claims of various types, which arise in the ordinary course of business. In the opinion of the Organization's management, based on information furnished by counsel and others, the ultimate liability, if any, of the aforementioned claims is not expected to have a material impact on the Organization's financial position.

13. Federal Contract Revenues:

The Organization receives funding under various direct federal and pass-through contracts. The following is a summary of contracts awarded:

CFDA Number/Project Title	Performance Period	Total Award	Federal Contract Revenues for the Year Ended September 30, 2013
84.327T AIM	10/01/2009 - 09/30/2014	\$ 4,998,482	\$ 968,947
84.327P NIMAS	10/01/2009 - 09/30/2014	1,998,927	364,453
84.327M Center for Use of Emerging Technologies to Improve Literacy Achievement for Students with Disabilities in Middle School	01/01/2012 - 12/31/2016	9,978,548	2,444,861
84.327U Center on Online Learning and Students with Disabilities	01/01/2012 - 12/31/2016	2,158,687	470,846
84.305A Creating Compositions	07/01/2011 - 06/30/2014	1,498,469	674,327
47.076 Pathways: Emotion and Thinking in Designed Informal Science Environments	10/01/2012 - 09/30/2014	249,997	109,384
47.076 Inquiry Primed: An Intervention to Mitigate the Effects of Stereotype Threat in Science	09/15/2013 - 08/31/2016	449,968	3,526
47.076 Stigmatization and Stereotype Threat Among Adolescents with Learning Disability: Impacts on Cognition and Performance in Math	09/01/2013 - 08/31/2015	367,713	5,893
47.076 Developing UDL Contextual Support for Biocomplexity Sprawl and Arctic units	09/01/2010 - 08/31/2013	645,739	143,659
47.076 A Digital Resource & Preservice Model for Developing TPCK	09/01/2009 - 08/31/2012	412,457	667
47.076 The Urban Math and Science Teacher Collaborative	09/01/2012 - 08/31/2014	59,200	2,500
84.324A Assessment for Accountability	03/23/2010 - 02/28/2014	192,738	45,017
84.324A Assessment for Accountability	03/01/2007 - 1/31/2013	420,004	2,034
Total Federal Contracts		<u>\$ 23,430,929</u>	<u>\$ 5,236,114</u>

For the Year Ended September 30

2013

Federal Grantor/Pass-through Grantor/Program or Cluster Title	Federal CFDA Number	Contract Number	Federal Expenditures
Major Programs:			
U.S. Department of Education:			
Direct Funding:			
Special Education_Technology and Media Services for Individuals with Disabilities	84.327	H327T090001 H327T090001	\$ 1,333,400
Pass-Through Emerging Tech Special Education_Technology and Media Services for Individuals with Disabilities	84.327	H327M110003-11A	2,444,861
Pass Through Online Learning Special Education_Technology and Media Services for Individuals with Disabilities	84.327	H327U110011	470,846
Total Major Programs			<u>4,249,107</u>
Non-Major Programs:			
U.S. Department of Education:			
Direct Funding:			
Education Research, Development and Dissemination	84.305	R305A110333	<u>674,327</u>
National Science Foundation:			
Direct Funding:			
Education and Human Resources	47.076	DRL-1222613	118,803
Pass-Through TERC Education and Human Resources	47.076	DRL-1020089	143,659
Pass-Through SRI International Education and Human Resources	47.076	DRL-0918339	667
Pass-Through Noyce Education and Human Resources	47.076	DRL-0918339	2,500
			<u>265,629</u>
U.S. Department of Education:			
Pass-Through SRI International Research in Special Education	84.324	R32A100068 R324A070035	47,051
Total Non-Major Program			<u>987,007</u>
Total Expenditures of Federal Awards			<u>\$ 5,236,114</u>

Notes to the Schedule of Expenditures of Federal Awards for the Year Ended September 30, 2013***Note 1- Basis of Presentation***

The accompanying schedule of expenditures of federal awards includes the federal grant activity of CAST, Inc. ("the Organization") under programs of the federal government for the year ended September 30, 2013. The information in this schedule is presented in accordance with the requirements of OMB Circular A-133, *Audits of States, Local Governments, and Non-Profit Organizations*. Because the schedule presents only a selected portion of the operations of the Organization, it is not intended to and does not present the financial position, changes in net assets or cash flows of the Organization.

Note 2- Summary of Significant Accounting Policies

Expenditures reported on the Schedule are reported on the accrual basis of accounting. Such expenditures are recognized following the cost principles contained in OMB Circular A-122, *Cost Principles for Non-profit Organizations*, wherein certain types of expenditures are not allowable or are limited as to reimbursement. Negative amounts shown on the Schedule, if any, represent adjustments or credits made in the normal course of business to amounts reported as expenditures in prior years. Pass-through entity identifying numbers are presented where available.

To the Board of Directors
CAST, Inc.
Wakefield, Massachusetts

Independent Auditor's Report on Internal Control Over Financial Reporting and on Compliance and Other Matters Based on an Audit of Financial Statements Performed In Accordance With Government Auditing Standards

INDEPENDENT AUDITORS' REPORT

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, the accompanying financial statements of CAST, Inc. (the "Organization") which comprise the statement of position as of September 30, 2013, and the related statements of activities, functional expenses and cash flows for the year then ended, and the related notes to the financial statements, and have issued our report thereon dated January 31, 2014.

Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered CAST, Inc.'s internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control. Accordingly, we do not express an opinion on the effectiveness of the Organization's internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the Organization's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

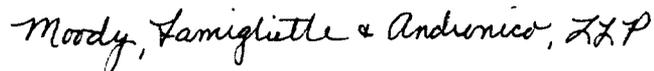
Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

Compliance and Other Matters

As part of obtaining reasonable assurance about whether the Organization's financial statements are free of material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Organization's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Organization's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.



Moody, Famiglietti & Andronico, LLP

Moody Famiglietti & Andronico, LLP
Tewksbury, Massachusetts
January 31, 2014

To the Board of Directors
CAST, Inc.
Wakefield, Massachusetts

Independent Auditors' Report on Compliance for Each Major Federal Program and on Internal Control over Compliance Required by OMB Circular A-133

INDEPENDENT AUDITORS' REPORT

Report on Compliance for Each Major Federal Program

We have audited the compliance with the types of compliance requirements described in the U.S. Office of Management and Budget (OMB) *Circular A-133 Compliance Supplement* that could have a direct and material effect on each of CAST, Inc.'s (the "Organization") major federal programs for the year ended September 30, 2013. The Organization's major federal programs are identified in the summary of independent auditors' results section of the accompanying schedule of findings and questioned costs.

Management's Responsibility

Management is responsible for compliance with the requirements of laws, regulations, contracts, and grants applicable to its federal programs.

Auditors' Responsibility

Our responsibility is to express an opinion on compliance for each of the Organization's major federal programs based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and OMB Circular A-133, *Audits of States, Local Governments, and Non-Profit Organizations*. Those standards and OMB Circular A-133 require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about the Organization's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each major federal program. However, our audit does not provide a legal determination of the Organization's compliance.

Opinion on Each Major Federal Program

In our opinion, CAST, Inc. complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended September 30, 2013.

Report on Internal Control Over Compliance

Management of the Organization is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to above. In planning and performing our audit of compliance, we considered the Organization's internal control over compliance with the types of requirements that could have a direct and material effect on each major federal program to determine the auditing procedures that are appropriate in the circumstances for the purpose of expressing an opinion on compliance for each major federal program and to test and report on internal control over compliance in accordance with OMB Circular A-133, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of the Organization's internal control over compliance.

A deficiency in internal control over compliance exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. *A material weakness in internal control over compliance* is a deficiency, or combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. *A significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of OMB Circular A-133. Accordingly, this report is not suitable for any other purpose.

Moody, Famiglietti & Andronico, LLP

Moody, Famiglietti & Andronico, LLP
Tewksbury, Massachusetts
January 31, 2014

Year Ended September 30, 2013

I. Summary of Independent Auditor's Results

Financial Statements

Type of auditor's report issued: Unmodified

Internal control over financial reporting:

- Material weakness identified? Yes No
- Significant deficiencies identified that are not considered to be material weaknesses? Yes None Reported

Noncompliance material to financial statements noted? Yes No

Federal Awards

Internal control over major programs:

- Material weakness identified? Yes No
- Significant deficiencies identified that are not considered to be material weaknesses? Yes None Reported

Type of auditor's report issued on compliance for major programs: Unmodified

- Any audit findings disclosed that are required to be reported in accordance with section 510(a) of OMB Circular A-133? Yes No

Identification of major program:

CFDA Number(s)

84.327

Name of Federal Program or Cluster

Special Education- Technology and Media Services for Individuals with Disabilities

Dollar threshold used to distinguish between Type A and Type B programs \$300,000

Auditee qualifies as low-risk auditee? Yes No

Year Ended September 30, 2013

II. Findings Related to the Financial Statement Audit as Required to be Reported in Accordance with Generally Accepted Government Auditing Standards:

A. Significant Deficiencies or Material Weaknesses in Internal Control Over Financial Reporting

None

B. Compliance Findings

None

III. Findings and Questioned Costs for Major Federal Award Programs to be Reported in Accordance with OMB A-133.

A. Significant Deficiencies or Material Weaknesses in Internal Control Over Compliance

None

B. Compliance Findings

None

Year Ended September 30, 2013

Prior Year Findings:

None

1 Highwood Drive | Tewksbury, MA 01876

Name	Page
Rachel Currie-Rubin	1
Samantha Daley	5
Mindy Johnson	10
Grace Meo	16
Allison Posey	22
Patricia Ralabate	24
David Rose	29
Joy Zabala	34

CURRICULUM VITAE

RACHEL CURRIE-RUBIN
CAST, Inc.
40 Harvard Mills Square, Suite 3
Wakefield, MA 01880
781-245-2212

EDUCATION

- 2012 **Harvard Graduate School of Education**, Cambridge, MA
Ed.D. Human Development and Education
Thesis: Ill-Structured Problem Solving of Novice Reading Specialists and Expert Assessment Specialists: Learning and Expertise
Thesis Committee: Catherine Snow, Jennifer Thomson, Eileen McGowan
- 2005 **Harvard Graduate School of Education**, Cambridge, MA
Ed.M., Language and Literacy
Advisor: Cecilia Minden-Cupp
- 2004 Ithaca College, Ithaca, NY
B.S., Teaching Students with Speech and Language Disabilities

SELECTED PROFESSIONAL EXPERIENCE

- Current **CAST, Inc.: Director of Online Learning**
The director of online learning provides leadership across the current and future online learning offerings, policies and initiatives; ensure that CAST's online learning offerings are aligned with the standards of appropriate accrediting bodies, model the UDL framework to enhance student learning and are informed by research into best practices for adult and online teaching; oversee the online learning instructional design and instructors; administer the online learning budget and work closely with the operations team around marketing, logistics, administrative tasks the online learning infrastructure.
- 2013-2014 **Carroll School: Researcher Psychoeducational Assessment**
Lincoln, MA

Worked to conduct educational and cognitive computer based assessments for approximately 400 students within a project focused on improving students' cognitive skills using computer based interventions.
- 2012-2013 **CAST, Inc.: Research Scientist and Instructional Designer**
Wakefield, Massachusetts

Professional Development Provider:
Facilitator: Facilitated the Massachusetts FOCUS online graduate level courses on Universal Design for Learning, which is related to inclusive education, technology, affect, and instruction. Guided graduate students and current teachers through the content of the online course providing feedback around instruction.

Universal Design for Learning Academy Facilitator: With funding from the Massachusetts Department of Education, CAST worked with level four and five districts

in Massachusetts to teach them about Universal Design for Learning, help them plan for implementation in their schools and districts based on identified problems of practice, and to begin to implement change in their schools (2012-2013).

Projects

Research Scientist, National Center on the Use of Emerging Technologies to Improve Literacy Achievement for Students with Disabilities in Middle School (CET). Principal Investigators: David H. Rose (CAST) and Ted S. Hasselbring (Vanderbilt University). In partnership with Vanderbilt University, the Center is researching and developing a technology-rich learning environment that makes it possible for schools to provide personalized literacy support across content areas to students throughout the school day—The Universal Literacy Network (ULN). Broadly, the purpose of the Universal Literacy Network is to foster a passionate interest and investment in reading for students who have traditionally been uninterested in, or disenfranchised by, traditional classroom literacy practices. Funded by the U.S. Department of Education, Office of Special Education Programs (2012-2017).

Research Scientist, The Center on Online Learning and Students with Disabilities. Principal Investigators: David H. Rose (CAST), Donald Deshler (University of Kansas), William East (National Association of State Directors of Special Education). The Center is conducting research on how K-12 online learning impacts the access, participation, and progress of students with disabilities. The research agenda is aimed at 1) identifying the trends and issues in online education, 2) developing and testing designs and practices that promise to make online education more effective and accessible, and 3) conducting research that impacts the future of online education. Funded by the U.S. Department of Education, Office of Special Education Programs (2012-2017).

Research Scientist, Project OPEN.

Principal Investigators: Sam Johnston (CAST). With a grant from the Bill & Melinda Gates Foundation and in collaboration with Creative Commons (CC), Carnegie Mellon Open Learning Initiative (OLI), and the Washington State Board for Community & Technical Colleges (SBCTC), CAST provided comprehensive infrastructure support and capacity building to all Department of Labor, Trade Adjustment Assistance Community College & Career Training Grant (C3T) grantees. Our consortium will support the grantees to meet the Open Education Resource (OER) requirements of the C3T, adopt best practices in OER and learning design, develop institutional skills in open licensing, and document successes critical to ensuring future rounds of funding. These services address a missing component of the C3T grant program, and create a true multiplier effect by developing systems that are adoptable and adaptable, and that enable the broadest possible benefit from this huge public investment. This project represents a once-in-a-lifetime opportunity for building a community college curriculum based on best practices for teaching, learning and openness. The goal is to both raise the baseline for community college education based on best practices, and foster an exponential spread of the benefits by providing a models, design support, authoring platforms and OER guidance to support future efforts.

2013

Adjunct Professor- Harvard Graduate School of Education

Taught Psychoeducational Assessment, a course focused on language and literacy assessment to master's student. Developed lectures and projects. Worked closely with students as they conduct their own individual assessment of a student.

- 2005-2011 **Children's Hospital Boston: Educational Assessment Specialist (part time)**
Boston, Massachusetts
- Conducted evaluations of oral, written language, and mathematical skills for students referred for difficulties in school; member of interdisciplinary team with a psychologist, physician and clinical fellows. Supervisor: Dr. Elaine LeClair.
- 2009 **CASE Fellowship: Fellow**
Wakefield, MA
- Worked with CAST under the CASE Fellowship to explore conceptual change as related to Universal Design for Learning. Created a teaching case to explore how individuals understand Universal Design for Learning and change their teaching practices as a result of their learning.
- 2008-2009 **Cambridge Community Learning Center: English and Mathematics Adult Education Teacher**
Cambridge, MA
- Created curricula in English and mathematics and taught adults at the "Intermediate Two" level. Focused on decoding, fluency, and comprehension skills in context in English and addition, subtraction and multiplication skills in mathematics.
- 2005-2006 **Fluency Factory (Beal Street Academy): Reading Teacher**
Hingham, MA
- Taught reading and math to individuals and small groups of children using reading programs including the Lindamood Bell LiPS program (phonemic awareness) and various comprehension programs and strategies. Developed curricula for kindergarten reading and middle school writing programs.

PRESENTATIONS AND PUBLICATIONS

- Currie-Rubin, R., Smith, S. (in press). Parents and teachers collaborating to support students with disabilities in online courses. *Teaching Exceptional Children*.
- Ralabate, P. K., Currie-Rubin, R., Boucher, A., & Bartecchi, J. (Under review). Collaborative planning using Universal Design for Learning. *Perspectives ASHA Special Interest Group 16, School-Based Issues*.
- Karger, J. & Currie-Rubin, R. (2013). Addressing the educational needs of incarcerated youth: Universal Design for Learning as a transformative framework. *Journal of Special Education Leadership*, 26(2), pp. 106-116.
- Bahena, S., Cook, N., Currie-Rubin, R., Kuttner, P., & Ng, M. (Eds) (2012). *Disrupting the school to prison pipeline*. Cambridge, MA: Harvard Educational Review.
- Currie-Rubin, R. & Neugebauer, S. (June 2011). *Do School Screening Assessments Reflect School Relevant Skills for Language Minority Students?* Poster Presentation. Enhancing Literacy Development in European Languages, Prague, Czech Republic.
- Currie-Rubin, R. (November 2009). *The Perception and Spelling of Vowels in Different Contexts by Children With and Without Dyslexia*. Paper Presentation. Boston University Conference on Language Development, Boston, Massachusetts.
- Currie-Rubin, R. (October 2009). *Vowel Perception and Spelling of Children with Reading Difficulties*.

Poster Presentation. American Speech Hearing Association National Convention, New Orleans, Louisiana.

Currie-Rubin, R. & Thomson, J. (May 2009). *Vowel Perception and Spelling of Children with Dyslexia*. Poster Presentation. International Mind Brain and Education Society Conference, Philadelphia, Pennsylvania.

Neugebauer, S. & Currie-Rubin, R. (2009). Read-alouds in Calca, Peru: A bilingual indigenous context. *The Reading Teacher*, 62(5), 396–405.

Currie-Rubin, R. (April 2008). *Spelling and Vowel Perception of Children with Dyslexia in Different Consonant Contexts: Pilot study*. Round Table, Harvard Graduate School of Education Student Research Conference, Cambridge, Massachusetts.

Currie-Rubin, R. (February 2005). *Direct and Indirect Directives Among African American and Anglo American Parents and Children*. Poster Presentation, Harvard Graduate School of Education Student Research Conference, Cambridge, MA.

Currie-Rubin, R. (November 2003) *Speaking to Culture.com: Treatment Applications for Culturally and Linguistically Diverse Populations*. Poster Presentation, American Speech and Hearing Association National Convention, Chicago, Illinois.

COMMITTEES

2010-2012 **Editor**, Harvard Educational Review
 2007-2009 **President**, Reading Education and Language Graduate Student Group, Harvard Graduate School of Education
 2008-2009 **Tri-Chair**, Student Research Conference, Harvard Graduate School of Education
 2003-2004 **Vice President**, National Speech Language Hearing Association, Ithaca College

HONORS AND AWARDS

2011 Harvard Graduate School of Education Travel Grant
 2009 CASE Fellowship with Harvard Graduate School of Education and CAST
 2009 Dean's Summer Fellowship
 2007 David Rockefeller Center Travel Grant
 2005-2006 Roy E. Larsen Fellowship, Emily H. and Richard B. Fisher Fellowship
 2004 Graduated Summa Cum Laude
 2001 Presidential Scholarship, Ithaca College
 2002 Oracle Society, Ithaca College
 2002 Pi Lambda Theta, Ithaca College

CURRICULUM VITAE

SAMANTHA DALEY

CAST, Inc.
40 Harvard Mills Square, Suite 3
Wakefield, MA 01880
781-245-2212 sdaley@cast.org

EDUCATION

- 2010 **Harvard Graduate School of Education**, Cambridge, MA
Ed.D., Human Development & Psychology
Thesis: Emotional Responses During Reading Tasks: What Shapes Them and How They Relate to Reading Comprehension
Thesis Committee: David Rose, Ed.D., Kurt Fischer, Ph.D., John Willett, Ph.D.
- 2005 **Harvard Graduate School of Education**, Cambridge, MA
Ed.M., Mind, Brain, and Education
Advisor: Kurt Fischer, Ph.D.
- 2000 **Teachers College, Columbia University**, New York, NY
M.A., Learning Disabilities
Advisor: D. Kim Reid, Ph.D.
- 1999 **Northwestern University**, Evanston, IL
B.S., Journalism & Political Science

PROFESSIONAL EXPERIENCE

- 2010-present **CAST, Inc.: Research Scientist**
Wakefield, Massachusetts

Investigates the relationship between emotions and cognitive performance of students, particularly those with learning disabilities. Focuses on how the design of the learning environment and academic tasks relate to students' emotional and motivational states, and how the nature of the learning environment contributes to overall emotional development.

Current and Recent Research Projects:

Research Lead, *Center on Emerging Technologies to Improve Literacy Achievement for Students with Disabilities in Middle School*. Principal Investigators: David H. Rose (CAST) and Ted S. Hasselbring (Vanderbilt University). In partnership with Vanderbilt University, the Center is researching and developing a technology-rich learning environment that makes it possible for schools to provide personalized literacy support across content areas to students throughout the school day—The Universal Literacy Network (ULN). The purpose of the ULN is to foster a passionate interest and investment in reading for students who have traditionally been uninterested in, or disenfranchised by, traditional classroom literacy practices. Funded by the U.S. Department of Education, Office of Special Education Programs (2012-2017).

Project Director, *Supported Lesson Building with Universal Design for Learning*. Development of a supported online lesson planning tool to support educators in

applying the principles of Universal Design for Learning in instruction and assessment. Funded by the Arthur Vining Davis Foundations (2011-2012).

Research Scientist, *Universal Design for Learning Modules for Foundation Science: Physics Curriculum*. CAST, in collaboration with content partner EDC, is enhancing Foundation Science Physics curriculum with embedded learning supports and scaffolds based on UDL principles and in support of the Common Core State Standards for literacy in science. Using UDL Studio, CAST's open source authoring platform, the approach allows curriculum developers and teachers to easily create learning modules across a range of curriculum areas. Funded by EDUCAUSE (2011-2012).

Project Director, *A Comprehensive Universal Design for Learning Approach to Improve Reading Across the Curriculum for High-Need Students*. Principal Investigators: David Rose and Tracey Hall. First phase of a significant district-based implementation initiative that uses Universal Design for Learning to address poor reading comprehension skills across content areas in the middle grades. Funded by the Bill & Melinda Gates Foundation (2010-2011).

Research Scientist, *Developing Universal Design for Learning Supported Reading and Inquiry Tools for Educators*. Partnership with Google to develop web-based tools for supported reading and supported inquiry to improve adolescent literacy based on the principles of Universal Design for Learning. Funded by The Carnegie Corporation of New York (2009-2011).

Research Scientist, *The Universally Designed Science Notebook: An Intervention to Support Students with Disabilities in Science Learning*, with the Lawrence Hall of Science/University of California-Berkeley to develop and investigate a universally designed science notebook to support 4th- and 5th-grade students with high-incidence disabilities. Funded by the U.S. Department of Education, Institute of Education Sciences (2007-2011).

Research Scientist, *Universal Design of Inquiry-Based Middle and High School Science Curriculum*, with EDC and University of Michigan. Principal Investigators: David Rose, Boris Goldowsky, Jacqueline Miller, Joseph Krajcik, LeeAnn Sutherland. Development and evaluation of universally designed science curricula (with a focus on students with learning disabilities in inclusive science classrooms), an authoring system for creating UDL science curricula, and UDL science guidelines for curriculum developers. Funded by the National Science Foundation (2007-2011).

2005-2007 **Harvard University, Stress and Cognitive Performance Project:**
Research Assistant
Cambridge, MA

With Wendy Berry Mendes, Ph.D., studied the psychophysiological stress response and cognition in adolescents and older adults.

2004-2006 **Harvard Graduate School of Education, Usable Knowledge in Mind, Brain, and Education Conference: Research Assistant**
Cambridge, MA

With Kurt Fischer, Ph.D., assisted in planning conference held in October 2004. Co-edited a series of papers based on the conference for *Mind, Brain, and Education* journal.

- 2005-2006 **Children's Hospital, Boston, Learning Disabilities Program: *Clinical Fellow***
Boston, MA
Conducted evaluations of oral and written language skills for students referred for difficulties in school; member of interdisciplinary team with neurologist, neuropsychologist, psychologist, and math specialist. Supervisor: Grant Cioffi, Ph.D.
- 2004 **CAST, Inc.: *Research Assistant***
Wakefield, MA
With Bridget Dalton, Ed.D., analyzed qualitative and quantitative data for two federally funded studies of reading comprehension by students with and without learning disabilities in a digital environment.
- 2003-2004 **Harvard University, Laboratory for Developmental Studies: *Research Assistant***
Cambridge, MA
With Jesse Snedeker, Ph.D., conducted research on language acquisition in young children, with a focus on semantic and syntactic bootstrapping in verb learning.
- 2001-2003 **Wheelock College: *Coordinator of Disability Services***
Boston, MA
Coordinated services for more than 100 students with disabilities, trained faculty to work with students with a variety of learning needs.
- 2000-2001 **Manchester High School West: *Learning Disabilities Specialist***
Manchester, NH
Ran pilot program to support the transition to high school of 9th-grade students with language-based learning disabilities.

TEACHING EXPERIENCE

- 2006 **Harvard Graduate School of Education: *Instructor***
Cambridge, MA
Course: Introduction to Psycho-educational Assessment
- 2004-2009 **Harvard Graduate School of Education: *Teaching Fellow***
Cambridge, MA
Courses: Neuropsychology and Instructional Design/Universal Design for Learning; Cognitive Development, Education and the Brain
- 2005-2006 **Harvard Graduate School of Education: *Presidential Instructional Technology Fellow***
Cambridge, MA
Course: Intermediate Statistics: Applied Regression and Data Analysis

PUBLICATIONS

Peer-Reviewed Articles

- Rose, L. T., Daley, S. G., & Rose, D. H. (2011). Let the questions be your guide: MBE as interdisciplinary science. *Mind, Brain, and Education*, 5(4), 153-162. doi: 10.1111/j.1751-228X.2011.01123.x
- Christodoulou, J. A., Daley, S. G., & Katzir, T. (2009). Researching the practice, practicing the research, and promoting responsible policy: Usable knowledge in mind, brain, and education. *Mind, Brain, and Education*, 3(2), 65-67.
- Christodoulou, J. A., Daley, S. G., & Katzir, T. (Eds.) (2009). Special series: Usable knowledge in mind, brain, and education. *Mind, Brain, and Education*, 3(2), 3(3), 3(4), 4(1), 4(2).
- Rose, D. H., Harbour, W. S., Johnston, C. S., Daley, S. G., & Abarbanell, L. (2006). Universal design for learning in postsecondary education: Reflections on principles and their application. *Journal of Postsecondary Education and Disability*, 19(2), 135-151. (Reprinted in S. E. Burgstahler, & R. C. Cory (Eds.), *Universal Design in Higher Education: From Principles to Practice* (pp. 45-60). Cambridge, MA: Harvard Education Press.)

Peer-Reviewed Articles Under Review/In Preparation

- Daley, S.G., Willett, J.B., & Fischer, K.W. (revise and resubmit). Emotional responses during reading. *Journal of Educational Psychology*.
- Rappolt-Schlichtmann, G., Daley, S.G., Lim, S., & Lapinski, S. (solicited; revise and resubmit). Support-rich, universally designed digital learning environments: Efficacy in inquiry science, potential mechanisms of action. *Journal of Educational Psychology*.

Books

- Rappolt-Schlichtmann, G., Daley, S.G., & Rose, L.T. (Eds.) (in press). *Problem-centered thinking: A research reader in universal design for learning*. Cambridge: Harvard Education Press.

Book Chapters

- Fischer, K. W., & Daley, S. G. (2007). Connecting cognitive science and neuroscience to education: Potentials and pitfalls in inferring executive processes. In L. Meltzer (Ed.), *Executive function in education: From theory to practice* (pp. 55-72). New York: The Guilford Press.

PRESENTATIONS

Lim, S., Daley, S.G., & Meo, G. (June 2012). *Making Universal Design for Learning Happen: Three Implementation Tools*. Poster presented at annual conference of the International Society for Technology in Education, San Diego, CA.

Rappolt-Schlichtmann, G. & Daley, S.G. (June 2012). *Contextual Support in Universally Designed Digital Learning Environments: Efficacy in Inquiry Science, Mechanisms in Concept Development*. In H. Steenbeek (Organizer) and S. van der Steen (Organizer), Measuring children's understanding of scientific concepts using skill theory. Presented at annual meeting of the Jean Piaget Society, Toronto, ON.

Daley, S.G. (January 2012). *Co-regulation of Emotion and Cognition*. Invited presentation at Harvard Graduate School of Education, course titled Emotions in Development and Learning, Cambridge, MA.

Christodoulou, J.A. & Daley, S.G. (November 2011). *How Digital Technologies Are Redefining Reading Disorders*. Invited presentation at Learning & The Brain conference, Boston, MA.

Daley, S.G. & Christodoulou, J.A. (October 2009). *Emotions In Education*. Invited presentation at Harvard Graduate School of Education, course titled Introduction to Educational Neuroscience, Cambridge, MA.

Daley, S.G. & Rappolt-Schlichtmann, G. (May 2009). *The Educational Relevance Of Stress Physiology*. Poster presented at the national conference of the International Mind, Brain, and Education Society, Philadelphia, PA.

Daley, S.G. (March 2008). *Stress And Reading Comprehension In Students With Language-Based Learning Disabilities*. Poster presented at the annual conference of the American Educational Research Association, New York, NY.

Daley, S.G. (February 2007). *The Role Of Social Support In Predicting Success For Adolescents With Learning Disabilities*. Paper presented at the Student Research Conference and International Forum, Harvard Graduate School of Education, Cambridge, MA.

Daley, S.G. (February 2004). *Exploring The Relationships Between Metacognition, Academic Self-Concept, And Academic Success: A Study In Progress*. Poster presented at the Student Research Conference and International Forum, Harvard Graduate School of Education, Cambridge, MA.

HONORS AND AWARDS

2009-2010	American Association of University Women: Dissertation Fellowship
2009	International Mind, Brain, and Education Society: Travel Grant
2008	Jeanne Chall Reading Lab, Harvard Graduate School of Education: Doctoral Research Travel Grant
2007	Harvard Graduate School of Education: Advanced Doctoral Student Grant; Dean's Summer Fellowship
2006-2007	Spencer Foundation: Research Apprenticeship Grant
2005	Mind, Brain, and Behavior Program, Harvard University: Graduate Student Award

CURRICULUM VITAE

MINDY JOHNSON

CAST, Inc.

40 Harvard Mills Square Suite 3

Wakefield, MA 01880

781-245-2212 mjohnson@cast.org

EDUCATION

- 2005 **Harvard Graduate School of Education**, Cambridge, MA
Ed.M., Technology in Education
- 1996 **William Smith College**, Geneva, NY
M.A. in Sociology, Minor in Education

SELECTED PROFESSIONAL EXPERIENCE

- 2005-Present **CAST, Inc.: *Instructional Designer/Research Associate***
Wakefield, MA

A research and development firm, specializing in the development of innovative, technology-based educational resources and strategies based on the principles of Universal Design for Learning (UDL). Participate in the development of technology-based universally designed learning environments and manage the CAST, UDL Center, and AIM Center social media accounts. Areas of expertise and interest include the design and delivery of web-based applications for students, online professional development programs, adult learning, social media, games and education, and mobile technologies.

- 2004-2013 **Boston Museum of Science: *Overnight Program Instructor***
Boston, MA

Planned and conducted exhibit-related science and math workshops for groups of 15-30 elementary and middle school-aged children and facilitated drop-in science and math activities for 600+ children and adults. Assisted in training new instructors by conducting model science and math workshops within the exhibit halls during training exercises, collaborated with teacher assistants and museum volunteers during workshops and drop-in activities, and provided specific training and expertise in implementing UDL in informal learning environments.

- 2005-2006 **CAST, Inc.: *Research Assistant***
Wakefield, MA

Participated in the research and data analysis for a technology-based universally designed learning environment designed to assist students in writing science lab

reports. Also contributed to the development and organization of new content, learning objectives and assessment strategies for undergraduate and graduate level course in technology & media. Participated in the National Instructional Materials Accessibility Standard (NIMAS) Centers developing web- and print-based resources and planning and coordinating bi-annual NIMAS Development Committee meetings.

2004-2005 **CAST, Inc.: Intern**
Wakefield, MA

Participated in the development, research, and data analysis for a technology-based universally designed learning environment designed to assist students in writing science lab reports.

1996-1998 **Applied Behavior Analysis Team Member**
Chapel Hill, NC

Trained in the Lovass Model of Applied Behavior Analysis, provided services for two 2-4 year olds labeled with autism. Responsible for maintaining behavior analysis activities, videotaping sessions, attending bi-weekly team meetings, and providing summary notes from each session (2-3 times per week).

CURRENT AND RECENT CAST PROJECTS

*Project OPEN: Providing Technical Assistance Services for Creating Open Source Courseware for Community Colleges: **Instructional Designer.*** Providing expertise in learning and online course design as part of a collaborative project led by Creative Commons to work with partnering organizations Carnegie Mellon Open Learning Initiative and the Washington State Board for Community and Technical Colleges to help ensure that the open educational resources created with the Trade Adjustment Assistance Community College and Career Training (TAACCCT) federal funds are of the highest quality. Funded by the Bill and Melinda Gates Foundation (2011-2014).

*Center for Online Learning and Students with Disabilities: **Instructional Designer and Research Associate.*** Providing expertise in learning, special education, and online course design as part of a collaboration with the Center for Research on Learning (CRL) at the University of Kansas and the National Association of the Directors of Special Education (NASDSE). The purpose of the Center is to research how online learning can be made more accessible, engaging, and effective for K-12 learners with disabilities by investigating approaches that address learner variability within the range of conditions under which online learning occurs. Funded by the U.S. Department of Education, Office of Special Education Programs (2012-2017).

*Transforming Biocomplexity and the Habitable Planet: **Project/Prototype Manager, Instructional Designer, and Research Associate.*** Manage project activities, including prototype development, instructional design, and formative research of a UDL-enhanced version of a high school environmental science curriculum developed by TERC. Funded by the National Science Foundation (2010-2013).

*iSolveIt Algebraic Reasoning: **Project/Prototype Manager, Instructional Designer, and Research Associate.*** A project to develop mobile apps. Responsible for organizing, implementing, and maintaining project activities, including creating a mobile digital learning environment to support the development of algebraic reasoning skills. The environment includes specific supports for the working memory and affective components of algebraic reasoning and are based on the principles of UDL. Funded in part by the Oak Foundation (2010-2013).

*Massachusetts Focus Academy: **Instructional Designer and Course Instructor.*** Assisted with the development of two web-delivered UDL courses for in-service educators. Also acted as an instructor for one of the courses, facilitating web-conferences, asynchronous online discussions, and providing extensive feedback to students on assignments and weekly forum posts. Funded by the Massachusetts Department of Elementary and Secondary Education (2008-2011).

*Building Comprehension Through Social Understanding (BCSU) for Students with Autism Spectrum Disorders: **Instructional Designer.*** Assisting with the design and implementation of a demonstration project to determine the feasibility and effectiveness of the Building Comprehension Through Social Understanding instructional approach on the social understanding and reading comprehension skills of young (K-3) students with Autism Spectrum Disorders (ASD) in five schools in Massachusetts. Funded by The Deborah Munroe Noonan Memorial Research Fund (2010-2011).

*Universally Designed Science Notebook (SNUDLE): **Project Manager and Instructional Designer.*** Manage project activities including prototype development and instructional design for collaborative science instructional project with University of California-Berkeley/Lawrence Hall of Science. Funded by the U.S. Department of Education, IES Special Education Research (2008-2011).

*Universal Design of Inquiry-Based Science Learning: **Prototype Manager and Instructional Designer.*** Manage prototype development and contribute to instructional design for collaborative project developing a UDL curriculum authoring system, UDL guidelines for developing inquiry-based science curricula, and exemplar units of UDL science curricula. Partners are the University of Michigan and EDC. Funded by the National Science Foundation, Discovery K-12 Research (2008-2012).

*Science Writer: A Universally Designed Thinking Writer: **Instructional Designer and Research Associate.*** Provide support for research and implementation activities, score student writing samples according to an established rubric and Curriculum-Based Measurement strategies (Progress Monitoring), code quantitative data, and conduct teacher interviews and student observations. Funded by the U.S. Department of Education, Office of Special Education Programs, Steppingstones of Technology Innovation (2004-2008).

*Center for Implementing Technology in Education: **Instructional Designer.*** Survey and evaluate technology solutions (software and Web 2.0) for classroom use. Research and prepare informational materials related to Universal Design for Learning and differentiating instruction with technology. Funded by the U.S. Department of Education, Office of Special Education Programs; CAST subaward from American Institutes for Research (2005-2009).

TEACHING EXPERIENCE

2010-2012 **Harvard Graduate School of Education: *Teaching Fellow (appointed position)***
Cambridge, MA

T560: Universal Design for Learning: Meeting the Challenge of Individual Difference. Facilitated hands-on lab experiences with small groups of graduate students, met weekly with teaching staff to establish instructional goals, and assessed student work in ongoing discussion forums and project work.

2005-2006 **Harvard University: *Head Teaching Fellow (appointed position)***
Cambridge, MA

Psych 1703: Human Sexuality. Responsible for establishing lab section schedules, room assignments, leading meetings with course teaching staff, and troubleshooting student or course-related challenges as needed. Met weekly with course teaching fellows and professor to develop curricular goals and activities for discussion sections associated with the undergraduate psychology course. Led two weekly discussion and tutorial sections (15-20 students per section), assessed student writing assignments and exams, and managed course website information, including developing a list of supplemental reading materials.

2004-2005 **Harvard University: *Teaching Fellow (appointed position)***
Cambridge, MA

Psych 1703: Human Sexuality. Met weekly with course teaching fellows and professor to establish curricular goals and activities for discussion sections associated with the undergraduate psychology course. Led two weekly discussion and tutorial sections (15-20 students per section), assessed student writing assignments and exams, and managed course website information.

1997-2004 **East Chapel Hill High School: *Collaborative Special Education Teacher***
Chapel Hill, NC

Managed caseload of 20-25 students, including weekly student meetings, parent contact, IEP development, modifying student assignments and tests, meeting with general education teachers, and maintained student progress monitoring. Taught courses collaboratively in biology, mathematics, history, and applied chemistry. Developed curriculum for and taught a supplemental biology tutorial elective and academic strategies course. Developed a database for scheduling the entire student population with special needs (approximately 175 students) in appropriate classes with appropriate support services. Wrote a Collaborative Handbook for general education teachers about special education and the modifications, accommodations, and accessibility issues associated with students labeled with special needs. Provided in-service staff training in special education, diversity, website design, and web tools. Faculty representative (elected position) for the School Governance Committee, a group that regulates policy and practices at the school level.

1997 **Phillips Middle School: *Extended School Year Teacher***
Chapel Hill, NC

Developed and taught a summer extended school year class for middle school students with autism, focused on community-based outings, practical life skills, and workforce development skills.

1996-1997 **East Chapel Hill High School: *Special Services Teaching Assistant***
Chapel Hill, NC

One-on-one aide to assist a student labeled with autism so as to integrate student into regular academic classes for half of the day. Trained in TEACCH (Treatment and Education of Autistic and related Communication Handicapped Children), a research-based method for supporting students with autism spectrum disorders. Also assisted in a self-contained classroom for students labeled with autism, conducting workshops, developing a project-based learning experience for a subset of students, and assisting in a self-contained reading support class for students labeled with learning disabilities.

TEACHING CERTIFICATION

New York (1996-2001):

Cross-categorical Special Education (K-12)

Elementary (K-6)

North Carolina (1997-2008):

Cross-categorical Special Education (K-12)

Elementary (K-6)

PUBLICATIONS

Price, J. F., Johnson, M., & Barnett, M. (2012). Universal design for learning in the science classroom. In T. E. Hall, D. H. Rose, & A. Meyer (Eds.), *Universal design for learning*. New York, NY: Guilford.

ACADEMIC HONORS

Harvard University Certificate of Distinction in Teaching, Harvard University (2005 & 2006)

Magna Cum Laude, William Smith College (1996)

SELECTED PRESENTATIONS

Presenter, Building Your PLN Through Social Media. Universal Design for Learning: Reaching All Learners, Harvard Graduate School of Education, Cambridge, MA (July 2013).

Presenter, Science Writer: A UDL Approach to Supporting Comprehension of the Scientific Process Through Writing. MassCUE Convention, Foxboro, MA (October 2012).

Poster Presenter, The UDL Curriculum Toolkit: Building Flexible, Customizable Learning Environments. ISTE Convention, San Diego, CA (June 2012).

Playground Spotlight Presenter, Three for FREE: Three UDL Tools You Can Use Today!, ISTE Convention, Philadelphia, PA (June 2011).

Presenter, Beyond Print: Interactive Digital Curricula for the Diverse Classroom, ISTE Convention, Denver, CO (June 2010).

Presenter, UDL in Secondary Education, the National Down Syndrome Congress Conference, Boston, MA (July 2008).

Presenter, Supporting the Scientific Inquiry Process with UDL, the Council for Exceptional Children National Convention, Boston, MA (April 2008).

Presenter, A UDL Approach to Monitoring Student Progress in Writing Students' Science Reports, the Council for Exceptional Children National Convention, Louisville, KY (April 2007).

Presenter, Universal Design for Learning: Applications in the Classroom, Harvard Extension School, Cambridge, MA (November 2006).

PROFESSIONAL AFFILIATIONS

International Society for Technology in Education (ISTE), Member (2008-present); Special Education Technology Special Interest Group (SETSIG), Board Member-at-Large (2011-present); Special Interest Group for Online Learning (SIGOL), Board Member-at-Large (2013-present).

CURRICULUM VITAE

GRACE JOANNE MEO

CAST, Inc.

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Wakefield, MA 01880

781-245-2212 gmeo@cast.org

EDUCATION:

- 1970 **Boston College Graduate School of Education**, Chestnut Hill, MA
Master of Education in Early Childhood Education
- 1968-1969 **Teacher's College, Columbia University**, New York, NY
Candidate for Master of Arts in Developmental Psychology
- 1968 **Regis College**, Weston, MA
Bachelor of Arts in Psychology

PROFESSIONAL EXPERIENCE:

- 1999-Present **CAST, Inc.: Sr. Director, Professional Learning and Outreach Services**
Wakefield, MA

National Initiatives:

CAST Project Manager, Center for Implementation of Technology in Education (CITEd II): The American Institutes of Research (AIR) and CAST are collaborating to provide technical assistance to SEAs and LEAs in implementing and evaluating selected evidence-based technology practices. Funded by the U.S. Dept. of Education's Office of Special Programs, 2010-2015.

Manager, CAST's professional development and outreach programs for K-12 teachers and administrators and post-secondary faculty throughout the United States.

Developer and Project Manager, the National UDL Faculty program designed to train education professionals and faculty in postsecondary institutions as PD providers in Universal Design for Learning.

Manager and Course Designer, CAST professional development institutes and courses, both face-to-face and online courses.

Manager, national consortium of 3500 educators who collaborate with CAST on researching, designing, modeling, and disseminating universally designed materials and practices.

District Liaison for the Comprehensive Implementation Planning grant, working with districts and CAST team members to develop a sustainable and scalable plan to support literacy instruction for middle school students through the framework of Universal Design of Learning.

Director, Research to Practice, National Center on Accessing the General Curriculum (1998-2003) an OSEP funded national center on improving access to the general curriculum for students with disabilities through Universal Design for Learning.

State, District/Local Initiatives:

Leading UDL initiatives for state departments of education including Massachusetts, Michigan, Minnesota, Connecticut, and Iowa and districts, such as Baltimore City Schools, Prince George's County, Northeast Region of Massachusetts, San Diego, and Philadelphia.

1997-1999

Massachusetts Department of Education: *Instructional Technology Specialist, Statewide Sabbatical Teacher (Selected through a statewide competitive search)*

Malden, MA

Responsibilities included: Supporting Massachusetts technology initiatives; assisting in the development of technology programs for the state; overseeing the progress of state technology grants; conducting statewide workshops and presentations that support the integration of technology into the Massachusetts Curriculum Frameworks; membership on the Lawrence Public Schools oversight team; and Project Coordinator for Project MEET (\$10M, five year U.S. DOE Technology Innovation Challenge Grant, focusing on a systemic model of technology professional development).

1999

North Shore Community College: *Instructor*

Lynn, MA

Teaching "Technology in the Schools" to adults seeking certification as technology assistant.

1988-1997

Hamilton-Wenham Regional School District: *Technology Coordinator for the Elementary Schools*

Hamilton, MA

Responsibilities included: Training staff in the use of technology that aligns to the district curriculum; coordinating and maintaining Ethernet internet networking implementation at the building level; researching and writing grants; training parents as paraprofessionals to work with students; introducing and supporting technology related pilot projects; teaching students in the use of technology; general support of administrative staff; coordinating the district team for the State Technology Plan; overseeing and writing the district technology

plan; and working with district leadership to plan for district-wide technology integration and training.

- 1987-1988 **CAST, Inc.: *Director of Development***
Peabody, MA
Responsibilities included: Coordinating fund raising and marketing for CAST; assisting in development of budget and programs; teaching of special needs students in the CAST laboratory; and consulting with teachers about technology intervention for students with special needs.
- 1987-1989 **CAST, Inc.: *Program Coordinator***
Peabody, MA
Member of the Executive Planning Team: Responsible for program development and planning.
- 1977-1986 **North Shore Children's Hospital, Medical Educational Evaluation Center: *Psychoeducational Diagnostician***
Salem, MA
Responsible for evaluating individuals with special needs, meeting with schools and parents, and making recommendations for educational programs.
- 1977 **Saugus Public Schools: *School Psychologist***
Saugus, MA
- 1974-1976 **Hamilton-Wenham Regional High School: *School Psychologist/ Guidance Counselor***
Hamilton, MA
- 1970-1974 **Massachusetts General Hospital: *Psychiatric Social Worker and Psychodiagnostician***
Boston, MA
- 1969-1970 **Children's Hospital Medical Center: *Graduate Assistant in Special Education***
Boston, MA

STATE AND DISTRICT LEVEL UDL INITIATIVES:

Minnesota: Consult with MN Department of Education in the planning of a state-wide initiative to support the implementation of Universal Design for Learning and working with teams of state trainers and classroom teachers to apply UDL to practice.

New Jersey: Consulted with NJ Department of Education to design and implement professional development to support The Implementing New Curricular Learning with Universally Designed Experiences (INCLUDE) project.

Massachusetts: Consulted with MA Department of Elementary and Secondary Education to design and implement online UDL courses for MA educators as part of the Mass Focus Academy.

Connecticut: Consulted with and provided professional development to state level trainers at the State Educational Resource Center (SERC).

Louisiana: Consulted with Department of Education and provided professional development to educator teams as part of the “Bridging the Gap UDL” state level initiative.

Michigan: Consulted with and provided professional development to teams of educators across the state as part of the Michigan Technology Supports (MITS) project.

SELECTED PROFESSIONAL DEVELOPMENT COURSE DEVELOPMENT:

Universal Design for Learning: Reaching All Learners, 2005 - present: Co-Developer/Instructor of this week long institute, offered through Harvard Graduate School of Education, addressing critical questions about how to provide full access to the general education curriculum for all learners.

Canada: Alberta UDL Summer Institute – Making Connections, 2011 Co-Developer/Presenter for this three-day international institute offered with support from the Alberta Education and co-sponsored by the University of Alberta, presenting UDL as an educational approach to designing curriculum that increases access for all learners.

What is Universal Design for Learning and Universal Design for Learning - Applying the UDL framework to Lesson Development for Content Instruction, 2009: Co-Developer of these online modules that introduce the theory, principles, and application of Universal Design for Learning (UDL) to teacher candidates so that they will be better prepared to address the diverse needs, challenges, and strengths of their high school students.

Universal Design for Learning, an Introduction and Universal Design for Learning: Reaching and Teaching all Learners, 2008–2009: Co-Developer of two online graduate level courses for the Massachusetts Department of Education to be available to Massachusetts educators.

Universal Design for Learning: Reaching All Learners, 2008: Co-Developer/Instructor of this week long institute, offered through Harvard Graduate School of Education, addressing critical questions about how to provide full access to the general education curriculum for all learners.

Universal Design in Education Institute: New Directions for Teaching Learners with Diverse Needs, 2006: Co-Developer/Instructor of this week long institute, offered through Harvard Graduate School of Education, addressing critical questions about how to provide full access to the general education curriculum for all learners.

Supporting, Engaging, and Enhancing Comprehension for High School Students, 2005-2006: Project Director for this 15-month professional development initiative focusing on improving comprehension strategy instruction for high school content teachers. Funded by the Arthur Vining Davis Foundations.

Making Technology Count for K-8 Mathematics, 2005 Summer Institute: Instructor and Collaborator in the development of this summer institute, sponsored by CITED, a national center funded by the U.S. Department of Education that supports leadership at state and local education agencies to integrate instructional technology for all students to achieve high educational standards.

Planning for All Learners, 2004-2005: Project Director for this 15-month professional development program focusing on methods of lesson development for high school teachers, in order to ensure that all learners have access to rich, robust instruction supporting high academic standards. Funded by the Arthur Vining Davis Foundations.

Universal Design for Learning: Reaching and Teaching All Learners, 2002-present: Two- and three-day institutes for K-12 educators and administrators. In addition to regular institutes offered publicly at CAST, specialized institutes developed for New York state regional trainers, for members of the New England Compact, and for educators in local Massachusetts school districts and regional school districts in northeast Ohio.

Universal Design for Learning and Data-Driven Decision Making, 2005: Two-day institute focusing on using classroom level data reflecting student learning to inform daily teaching.

Differentiating Instruction, 2004: Co-Developer/Instructor for online reading instruction course with TeachScape for the state of Ohio.

Improving Early Literacy for Children with Cognitive Disabilities, 2003-present: Project Director, responsible for the development and implementation of professional development to support teams of parents and educators from school districts participating in the Massachusetts Comprehensive System of Personnel Development Training Project.

SELECTED PUBLICATIONS:

Meo, G. (2008). Curriculum planning for all learners: Applying universal design for learning (UDL) to a high school reading comprehension program. *Preventing School Failure, 52*(2), 21–30.

Coyne, P., Ganley, P., Hall, T., Meo, G., Murray, E., & Gordon, D. (2006). Applying universal design for learning in the classroom. In D. Rose, & A. Meyer (Eds.), *A practical reader in universal design for learning*. (pp. 1-13). Cambridge, MA: Harvard Education Press.

Meo, G., Coyne, P., Sandmel, K., & Hart, K. (2006). Improving early literacy for children with cognitive disabilities: A research to practice professional development initiative. *Counterpoint, Summer 2006*.



Meo, G. (2005). Curriculum access for all, a conversation with Grace Meo. *Harvard Education Letter*, 21(6), 4-6.

MEMBERSHIP:

State Reviewer of State Technology Plans, 1995-1997

Elementary Science Curriculum Review Committee, Hamilton Schools, 1994-1997

Chair of District-wide Technology Planning Committee, Hamilton Schools, 1997



CURRICULUM VITAE**ALLISON B. POSEY**

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Education:

Harvard Graduate School of Education, Cambridge, MA
 EdM., **Mind, Brain, and Education**, June 2009

James Madison University, Harrisonburg, VA
 B.S., **Biology**, cum laude, June 1996

Experience:

CAST, Center for Applied Special Technology, Wakefield, MA
 Instructional Designer and Professional Learning, spring 2009- present

- National lead presenter for Universal Design for Learning and Educational Neuroscience
- Consulting and strategic planning for UDL Implementation at a classroom, school, district level
- Online instructor and design collaborator for Massachusetts Department of Education courses:
 - Universal Design for Learning, 101
 - Universal Design for Learning: Affect & Engagement
- Research Assistant for the Universally Designed Science Notebook (SNUdle and IQWST)

Walnut Hill Arts Academy, Natick, MA
 Instructor, 2010-2012

- Developed curricula and taught Psychology, Anatomy/Physiology, and Biology
- Led workshops for educators on applying theories of Mind, Brain, and Education
- Led workshops for teens and their parents: 'Brain education'

Harvard University, Cambridge, MA
 Facilitator for Mind, Brain, Education Institute, summer 2010, 2011
 Teaching Fellow

- Educational Neuroscience, fall 2009, 2010
- Universal Design for Learning, spring 2010

Middlesex Community College
 Instructor, 2010-2012

- Curricular design and lead instructor: Biology, Anatomy & Physiology

Johns Hopkins University Center for Talented Youth, Baltimore, MD
 Instructor, summer 2009, 2002 - 2007, 1997, 1998

- Curricular design and implementation include: Neuroscience, Sensation and Perception, Exercise Physiology

Relevant Coursework:



Mind, Brain, and Education

- Focus on neural networks of attention and consideration of bias tendencies present in science media

Framing Scientific Research for Public Understanding

- Specific focus on presenting genetics for public understanding: epigenetics, biodiversity, GMOs

Educational Research Statistics

Designing and Producing Media for Education

- Production of Flash animation for plant genetics research

Selected Achievements:

- **Maryland Public Television** lesson plan research and design for science curricula
- **Physical Therapy** volunteer work with patients with neurological and muscular-skeletal injuries
- **Literacy Group** of North Carolina Public Schools: implemented standards and assessed project goals
- **Independent tutor** for middle and high school science and math
- **Presenter** Learning and Memory workshops: Auburn at Towson University, Roland Park Country

Continuing Education:

University of North Carolina, Chapel Hill: Statistics, Physics, Molecular Genetics, Developmental Psychology, 1998-2001

Maryland Institute, College of Art: Certificate in Fine Arts, 2007



CURRICULUM VITAE

PATRICIA KELLY RALABATE

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EDUCATION

- 2007 **George Washington University**, Washington, DC
Ed.D., Leadership in Transition and Special Education
Dissertation: *The Relationship of Students with Disabilities Performance on Adequate Yearly Progress Accountability Measures to Inclusion Rates*
Advisor: Dr. Carol Kocchar-Bryant
- 1977 **University of Massachusetts**, Amherst, MA
M.A., Speech-language Pathology
Thesis: *An Analysis of a Videotape Language Sampling Procedure*
Advisor: Dr. Harry Seymour
- 1972 **State University of New York**, Fredonia, NY
B.S., Education, Communication Disorders

PROFESSIONAL EXPERIENCE

- 2011–present **CAST, Inc.**, *Director of Implementation and Director of National Center on Universal Design for Learning (UDL)*
Wakefield, MA

Identify and develop resources across the organization to support the implementation and scaling of Universal Design for Learning nationally.

Current and Recent Projects

Director of Implementation, Project Consultant, Towson University Universal Design for Learning – Professional Development Network (UDL-PDN). Responsible for facilitating and supporting the faculty UDL Professional Learning Communities (PLCs) project at Towson University (MD) in consultation with the Office of Academic Innovation. Faculty PLC members explore advances in the learning sciences and flexible curricular materials in order to develop a deep understanding of UDL and its application to instruction in higher education (ongoing).

Director of Implementation, CAST Project Lead, District of Columbia Office of the State Superintendent of Education (OSSE) Universal Design for Learning – Common Core State Standards Project (UDL-CCSS). Responsible for leading CAST professional learning coaches supporting communities of practice within DC public schools and charter schools focused on infusing UDL practices in the implementation of the CCSS (ongoing).

Director of Implementation, Project Consultant, Towson University Presidential Scholar Universal Design for Learning Professional Development Project. Responsible for facilitating and supporting professional learning communities (PLCs) in the Baltimore County Public Schools (MD) as they apply the UDL framework to learning environments in middle schools. This project is a joint project of the Towson University Office of the Presidential Scholar, Baltimore County Public Schools, Kennedy-Kreiger Institute, and CAST (ongoing).

Director of Implementation, *Universal Design for Learning Professional Development System: Leveraging Technology, Data, and UDL Principles to Improve Teaching and Learning in Literacy*. Responsible for leading project team in developing a scalable approach to building educator skills and district capacity for system-wide implementation of UDL using a blended learning approach to deepen UDL practice aligned to the Common Core State Standards. Second phase of a three-year UDL implementation project targeting middle school literacy in four districts. Funded by the Bill & Melinda Gates Foundation (2011-2013).

Director of Implementation, *A Comprehensive Universal Design for Learning Approach to Improve Reading Across the Curriculum for High-Need Students*. Principal Investigators: David Rose and Tracey Hall. Responsible for establishing a systems change approach during the first phase of a significant district-based implementation initiative that uses Universal Design for Learning to address poor reading comprehension skills across content areas in the middle grades. Funded by the Bill & Melinda Gates Foundation (2010-2011).

Project Director, *National Center on Universal Design for Learning*. Responsible for leading the strategic planning for a resource-rich center to support the field of educators, researchers, advocates and families invested in the growing field of Universal Design for Learning. Responsibilities include: development of plans for scaling, philanthropic and federal funding; cultivation of strategic partnerships with national organizations and communities of practice; and development and oversight of the online UDL Professional Learning Series. Seed funding from the Emily Hall Tremaine Foundation (2009-2011).

Project Director, *Understanding the Impact of the American Recovery and Reinvestment Act on the Development of Universal Design for Learning Programs*. Responsible for oversight of a research project in collaboration with Tomas Hehir and Associates to provide critical quantitative research for use by local education agencies and state and federal policy makers regarding use and allocation of federal funding to support Universal Design for Learning. Funded by the Emily Hall Tremaine Foundation (2011).

2010–2011 **Boston College, Postdoctoral Fellow in Universal Design for Learning**
Boston, MA

In residence at CAST, Wakefield, MA

A unique OSEP-funded fellowship focused on advancing the study and implementation of Universal Design for Learning (UDL). Responsibilities included leading development of online professional learning resources and investigating the impact of national and state UDL policy initiatives.

2010-2012 **NEA Academy, Professional Development Consultant**
Washington, DC

Provide conceptual guidance and develop assessments and resources for the NEA Academy professional development course on Response to Intervention entitled *Mastering RTI: A Step by Step Approach*. Launched in the fall of 2010, this on-line course was developed as a partnership product of the National Education Association, American Federation of Teachers and the National Association of School Psychologists in collaboration with the RTI Action Network.

2005-present **George Washington University, Part-time Professorial Lecturer**
Washington, DC

Teach on-campus and on-line graduate level courses on disability policy, legal processes, special and bilingual education policies, and inclusive practices.

2002-2010 **National Education Association (NEA), *Senior Policy Analyst, Special and Gifted Education***
Washington, DC

Served as content specialist and policy analyst for disability, special and gifted education issues. Provided technical assistance to state leadership, built collaborative relationships with key national education and disability groups, served on national coalitions and advisory boards, analyzed and synthesized relevant research and policies (such as NCLB, Section 504, IDEA and ADA), developed print and web-based support materials for members and coordinated professional development activities of the NEA IDEA Special Education Resource Cadre, a group of 30 educator leaders.

2008-2009 **National Education Association (NEA), *Associate Director, Education Policy and Practice***
Washington, DC

Concurrent with above position, served in an interim management position as a member of NEA's Executive Staff, supervised and supported 25 content education experts (e.g., assessment & accountability, English language learners, parent/community engagement, charter schools, vouchers, mathematics, science, language arts, and standards-based education), coordinated work among different departments, and addressed personnel/budgetary issues.

1984-2001 **Danbury Public Schools, *Speech-language Pathologist***
Danbury, CT

Taught students (PK & elementary) with mild to severe speech-language disabilities within public and non-public school settings. Served as supervising and mentoring teacher for special education teacher candidates and speech-language pathologists. Led school-based Child Study Team in developing instructional action plans for at-risk students with academic or behavioral needs.

1999-2001 **Danbury Public Schools, *Planning and Placement Team Coordinator***
Danbury, CT

Coordinated and chaired Individualized Education Program (IEP) meetings for all students (PK to 12th grade) within the public schools who received speech-language services or students in non-public schools who received special education services. Led speech-language department development of district-wide speech-language eligibility criteria, speech-language bank of goals/objectives and a non-special education process to ensure that students not meeting special education eligibility criteria still received appropriate support. Provided professional development on collaborative team building, alignment of IEPs with state standards, emerging practices and disability laws.

1978-1984 ***Speech-language Pathologist, 3 Districts (Connecticut and Massachusetts)***

RELATED PROFESSIONAL EXPERIENCE

2012-2013 **National Secondary Transition Technical Assistance Center**
This center disseminates information regarding policies, procedures, and evidence-based practices focused on improving academic and functional achievement for students with disabilities to ensure college- and career-readiness.

2007-present **National Task Force on Universal Design for Learning, Co-Chair**
This cross-partner national task force promotes accessible curriculum and instructional materials through the implementation of universal design for learning (UDL) principles.

- 2007–2013 **National Dissemination Center for Children with Disabilities (NICHCY) Advisory Panel**
This OSEP-funded national TA&D center responds to requests for information about IDEA and provides the TA&D network with guidance on effective dissemination practices.
- 2007–2011 **National Accessible Reading Assessment Projects**
The advisory committee of this federally-funded project addressed standardized assessment accessibility for students with disabilities.
- 2005–2011 **National Coalition on Special Education and Related Service Shortages**
This cross-partner national coalition advocates for policies that help reduce shortages of special education personnel.
- 1999–2011 **IDEA Partnership, Activity Leader**
Co-led efforts to create a National Community of Practice on Universal Design for Learning. Collaborated with other organization representatives to create various products on the implementation of IDEA and communities of practice on disability and special education issues, such as transition, mental health, Title I, and conflict resolution and mediation under IDEA.
- 2008–2010 **National Center on Response to Intervention (RTI) Advisory Committee**
This federally-funded project is charged with providing technical assistance to state departments of education on implementing Response to Intervention.
- 2007–2010 **RTI Action Network Advisory Council**
Funded by the Cisco Foundation and supported by the National Center on Learning Disabilities, this group develops resources on RTI for educators.
- 2007–2010 **IRIS Advisory Committee**
This federally-funded project develops on-line professional development resources for higher education faculty and PK-12 educators.
- 2002–2011 **National Alliance of Pupil Staff Organizations (NAPSO)**
This cross-partner national coalition advocates for pupil and related service associations.
- 2000–2001 **U.S. Office of Special Education Expert Planning Panel**
Joined 80 key national special education researchers and advocates to identify research needs and program planning priorities for IDEA '97.

SELECTED PUBLICATIONS

- Ralabate, P., Currie-Rubin, R., Boucher, A., & Bartecchi, J. (March, 2014). Collaborative planning using Universal Design for Learning. *ASHA Perspectives*, Rockville, MD: American Speech-Hearing-Language Association.
- Domings, Y., Crevecoeur, Y. C., & Ralabate, P.K. (2013). Meeting the needs of learners with autism spectrum disorders: Universal design for learning. In K. I. Boser, M. S. Goodwin, & S. Wayland (Eds.) *Learning Technologies for People with Autism and Related Conditions: A Research-based Guide for Teachers, Parents, and Clinicians*. Baltimore, MD: Brookes Publishing Company.
- Ralabate, P., Hehir, T., Dodd, E., Grindal, T., Vue, G., Eidelman, H., Karger, J., Smith, F., & Carlisle, A. (2012). *Universal design for learning: Initiatives on the move: Understanding the impact of the Race to the Top and ARRA funding on the promotion of universal design for learning*. Wakefield, MA: National Center on Universal Design for Learning.
- Ralabate, P. (August, 2011). Universal Design for Learning: Meeting the needs of all students. *ASHA Leader*, Rockville, MD: American Speech-Hearing-Language Association.
- Ralabate, P. (Ed.) (2007). *Truth in labeling: Disproportionality in special education*. Washington, DC: NEA.
- Ralabate, P. (Ed.) (2006). *Twice-exceptional dilemma*. Washington, DC: NEA.
- Ralabate, P. (Ed.) (2005). *The puzzle of Autism*. Washington, DC: NEA.

- Ralabate, P. (2004). What is a “highly qualified” special education teacher? *Education for all, Accountability for all*. Washington, DC: The George Washington University.
- Ralabate, P. (2004). *Advocating for special education working conditions*. Washington, DC: NEA.
- Ralabate, P., & Foley, B. (2004). *IDEA and NCLB: The intersection of access and outcomes*. Washington, DC: NEA.
- Ralabate, P. (Ed.) (2004). *The accessible classroom primer CD*. Washington, DC: NEA, Johns Hopkins University & MAR*TEC.
- Ralabate, P. (2002). *Meeting the challenge: Special education tools that work for all kids*. Washington, DC: NEA Professional Library.
- Brannen, S. J., Cooper, E., Dellegrotto, J. T., Disney, S. T., Eger, D. L., Ehren, B. J., Ganley, K. A., Isakson, C. W., Montgomery, J. K., Ralabate, P. K., Secord, W. A., & Whitmire, K. A. (2000). *Developing educationally relevant IEPs: A technical assistance document for speech-language pathologists*. Rockville, MD: American Speech-Language and Hearing Association
- Holcomb, S., Admunson, E., & Ralabate, P. (2000). *The new IDEA survival guide*. Washington, DC: NEA Professional Library.

AWARDS

- 2010-2011 Boston College-CAST UDL Postdoctoral Fellowship, OSEP
- 2010 Martha J. Fields Award of Excellence, National Association of State Directors of Special Education (NASDSE)
- 2004-2007 OSEP Leadership in Special Education Scholarship, the George Washington University, Washington, DC

SELECTED AFFILIATIONS: Phi Delta Kappa, Association for Supervision and Curriculum Development, Council for Exceptional Children

CURRICULUM VITAE

DAVID H. ROSE

CAST, Inc.
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Wakefield, MA 01880
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EDUCATION

- 1976 **Harvard University, Graduate School of Education**, Cambridge, MA
Ed.D., Human Development & Reading
- 1968 **Reed College**, Portland, OR
M.A., Teaching
- 1967 **Harvard College**, Cambridge, MA
B.A., Psychology

PROFESSIONAL EXPERIENCE

- 1987–Present **CAST (Center for Applied Special Technology): *Chief Scientist, Cognition and Learning; Founding Director***
Wakefield, Massachusetts
- 1985–Present **Harvard Graduate School of Education: *Lecturer (Neuropsychology)***
Cambridge, Massachusetts
- 1983–1987 **North Shore Children’s Hospital: *Director, Medical Educational Evaluation Center***
Salem, Massachusetts
- 1978–1983 **Children’s Hospital Medical Center: *Psychologist, Dept. of Pediatrics, Developmental Evaluation Clinic***
Boston, Massachusetts
- 1973–1979 **Tufts University: *Assistant Professor, Elliot-Pearson Dept. of Child Study***
Medford, Massachusetts

CURRENT & RECENT RESEARCH GRANTS

- 2012–2016 ***Principal Investigator: Center on the Use of Emerging Technologies to Improve Literacy Achievement for Students with Disabilities in Middle School.*** Funded by the U.S. Dept. of Education, Office of Special Education Programs. In partnership with Vanderbilt University, the Center is researching and developing a technology-rich learning environment that makes it possible for schools to provide personalized literacy support across content areas to students throughout the school day–The Universal Literacy Network (ULN). The purpose of the ULN is to foster a passionate interest and investment in reading for students who have traditionally been uninterested in, or disenfranchised by, traditional classroom literacy practices.
- 2012–2016 ***Co-Principal Investigator: Center for Research in Online Learning for Students with Disabilities.*** Funded by the U.S. Dept. of Education, Office of Special Education Programs. CAST in collaboration with the University of Kansas and the National Association of State Directors of Special Education, conducts research on how K-12 online learning impacts the access, participation, and progress of students with disabilities. Research outcomes are expected to inform the design, selection, and implementation of online digital curriculum materials, the systems that deliver and support them, and the instructional practices associated with their use, in order to

- increase their efficacy for students with disabilities and other elementary and secondary learners.
- 2010–2015 **Co-Principal Investigator: Center for Implementation of Technology in Education (CITEd II):** Funded by the U.S. Dept. of Education’s Office of Special Programs (OSEP). The American Institutes of Research (AIR) and CAST are collaborating to provide technical assistance to SEAs and LEAs in implementing and evaluating selected evidence-based technology practices. CITEd II is a continuation of CAST’s previous successful five-year initiative with AIR and the Education Development Center (EDC).
- 2009–2014 **Principal Investigator: National Center on Accessible Instructional Materials (AIM):** Funded by the U.S. Dept. of Education’s Office of Special Programs (OSEP). The AIM Center provides technical assistance to state educational agencies, local education agencies, and other stakeholders to develop effective systems for the timely delivery of high-quality accessible instructional materials to all students with disabilities who need them. The National Center is a continuation of CAST’s work on the NIMAS Technical Assistance Center and the AIM Consortium.
- 2009–2014 **Principal Investigator: National Instructional Materials Accessibility Standard (NIMAS) Center:** Funded by the U.S. Dept. of Education’s Office of Special Programs (OSEP). The NIMAS Center oversees the creation of an increasingly valid and comprehensive NIMAS technical specification that is both practical and widely adopted by states, publishers, and conversion houses. The Center is continuation of CAST’s work on the NIMAS Development Center.
- 2007–2011 **Chief Scientist, Cognition and Learning: Principled Science Assessment Design for Students with Disabilities.** Funded by the U.S. Dept. of Education’s Institute of Education Sciences. SRI International and CAST are pairing UDL with the assessment design techniques and tools of evidence-centered design to develop assessment items that more accurately reflect outcomes for all students on statewide middle school science assessments.
- 2007–2011 **Chief Scientist, Cognition and Learning: The Universally Designed Science Notebook: An Intervention to Support Students with Disabilities in Science Learning.** Funded by the U.S. Dept. of Education’s Institute of Education Sciences. CAST, in collaboration with the Lawrence Hall of Science at the University of California-Berkeley, is investigating a universally designed science notebook to support 4th- and 5th-grade students, in particular those with high-incidence disabilities, in learning science.
- 2007–2011 **Principal Investigator: Universal Design of Inquiry-Based Middle and High School Science Curricula.** Funded by the National Science Foundation. CAST, in collaboration with Education Development Center (EDC) and the University of Michigan, is infusing UDL into middle school and high school science curricula and creating systems to support curriculum developers in creating universally designed science curricula.
- 2007–2009 **Principal Investigator: Accessible Instructional Materials (AIM) Consortium:** Funded by the U.S. Dept. of Education’s Office of Special Programs (OSEP). CAST is working intensively with 15 states on NIMAS implementation. The Consortium works to improve academic outcomes for approximately 1.3 million K-12 students with print disabilities through the timely acquisition and delivery of high-quality educational materials in accessible formats (audio, Braille, eText, large print).

- 2004–2009 **Principal Investigator: National Instructional Materials Standard (NIMAS) Development Center:** Funded by the U.S. Dept. of Education's Office of Special Programs (OSEP). Center provides national leadership to further the development and maintenance of the NIMAS work and support its large-scale implementation.
- 2004–2009 **Principal Investigator: National Instructional Materials Standard (NIMAS) Technical Assistance Center:** Funded by the U.S. Dept. of Education's Office of Special Programs (OSEP). Center supports the efficient production of baseline NIMAS files and the conversion of these files into alternate formats.
- 2004–2009 **Co-Principal Investigator: AIR Center for Implementation of Technology in Education (CITEd):** Sponsored by the U.S. Department of Education's Office of Special Programs (OSEP). The American Institutes of Research (AIR), CAST, and the Education Development Center (EDC) have established a Technology Implementation Center to provide a cohesive, coordinated system of technical assistance to support SEAs and LEAs in implementing and evaluating selected evidence-based technology practices.
- 2002–2005 **In-House Consultant: Reading to Learn (Investigating General and Domain-Specific Supports in a Technology Rich Environment with Diverse Readers Learning from Informational Text):** Funded by the U.S. Department of Education's Institute of Education Sciences. CAST and the University of Michigan are conducting this research to enhance our understanding of young students' comprehension of informational text and inform teacher practice, the design of texts and technology, and the design of websites.
- 1999–2004 **Principal Investigator: National Center on Accessing the General Curriculum (NCAC):** Funded by the U.S. Dept. of Education's Office of Special Programs (OSEP). Center provides a vision of how new curricula, teaching practices, and policies can be woven together to create practical approaches for improved access to the general curriculum by students with disabilities.

SELECTED PUBLICATIONS

Books:

- Rose, D.H., & Gravel, J.W. (2013). Using Digital Media to Design Student-Centered Curricula. In R. E. Wolfe, A. Steinberg, & N. Hoffmann (Eds.) *Anytime, Anywhere: Student-Centered Learning for Students and Teachers*. Cambridge, MA: Harvard Education Press.
- Hall, T.E., Meyer, A., & Rose, D.H. (2012). *Universal Design for Learning in the Classroom: Practical Applications*. New York: Guilford.
- Rose, D. H., & Meyer, A. (Eds.) (2006). *A practical reader in universal design for learning*. Cambridge, MA: Harvard Education Press.
- Rose, D., Meyer, A., & Hitchcock, C. (2005). *The universally designed classroom*. Cambridge, MA: Harvard Education Press.
- Rose, D., & Meyer, A., with Strangman, N., & Rappolt, G. (2002). *Teaching every student in the digital age: Universal design for learning*. Alexandria, VA: Association for Supervision and Curriculum Development.
- Meyer, A., & Rose, D. (1998). Learning to read in the computer age. In J. Chall (Series Ed.), & J. Onofrey (Ed.), *From reading research to practice*. Cambridge, MA: Brookline Books.

Selected Columns, Chapters and Articles (2008-2013):

- Rose, D.H. & Gravel, J.W. (in press). Universal design for learning. In L. Florian (Ed.) SAGE handbook of special education, 2nd Ed. London: SAGE.

- Glass, D., Meyer, A., & Rose, D.H. (2013). The Arts and Universal Design for Learning. In *The Harvard Educational Review, Expanding Our Vision for the Arts in Education*, 83(1). Cambridge, MA: Harvard Education Press.
- Dolan, R. P., Burling, K., Harms, M., Strain-Seymour, E., Way, W., & Rose, D. H. (2013). A Universal Design for Learning-based framework for designing accessible technology-enhanced assessments. (Research Report). Iowa City, IA: Pearson Education Measurement. Retrieved from http://images.pearsonclinical.com/images/tmrs/DolanUDL-TEAFramework_final3.pdf
- Karger, J., Rose, D., & Boundy, K. B. (2012). Applying “Universal Design for Learning” to the education of youth in detention and juvenile corrections facilities. In S. Bahena, N. Cooc, R. Currie-Rubin, P. Kuttner, and M. Ng (Eds.) *Disrupting the School-to-Prison Pipeline*, 119-143. Cambridge, MA: Harvard Educational Review.
- Chita-Tegmark, M., Gravel, J. W., Serpa, M. deL. B., Domings, Y., & Rose, D. H. (2012). Using the universal design for learning framework to support culturally diverse learners. *Journal of Education* 192(1): 17-22.
- Rose, D. H., & Gravel, J. W. (2012). Curricular opportunities in the digital age. Students at the Center Series. *Boston: Jobs for the Future*. Retrieved online from www.studentsatthecenter.org/papers/curricular-opportunities-digital-age
- Rose, D. H., & Gravel, J. W. (2010). Universal design for learning. In B. McGaw, P. Peterson, & E. Baker (Eds.), *International encyclopedia of education*, (3rd Ed). Oxford: Elsevier.
- Rose, D. H., & Vue, G. (2010, Winter). 2020’s learning landscape: A retrospective on dyslexia. *Perspectives on Language and Literacy*, 33-37.
- Rose, D., & Dalton, B. (2009). Learning to read in the digital age. *Mind, Brain, and Education*, 3(2), 74–83.
- Rose, D., & Gravel, J. W. (2009). UDL, global positioning systems, and lessons for improving education. In D. Gordon, J. Gravel, & L. Schifter (Eds.), *A policy reader in universal design for learning*. Cambridge, MA: Harvard Education Press.
- Rose, D. H., Hall, T. E., & Murray, E (2008, Fall). Accurate for all: Universal design for learning and the assessment of students with learning disabilities. *Perspectives on Language and Literacy*, 23-28.
- Rose, D. & Rappolt-Schlichtmann, G. (2008). Applying universal design for learning with children living in poverty. In S. B. Neuman (Ed), *Educating the other America: Top experts tackle poverty, literacy and achievement in our schools*. Baltimore, MD: Paul H. Brookes Publishing.
- Dalton, B., Rose, D., & Christodoulou, J. (submitted). *Technology’s role in advancing literacy and achievement for diverse adolescent learners*. A Report to the Carnegie Corporation of New York.
- Rose, D., & Dalton, B. (2008). Learning in the digital age. In K. W. Fisher & T. Katzir (Eds), *Building usable knowledge in mind, brain, and education*. Cambridge University Press.
- Dalton, B., & Rose, D. (2008). Scaffolding digital comprehension. In C. C. Block, & S. R. Parris (Eds.), *Comprehension instruction: Research-based best practices*, (2nd Ed), pp. 347-361. New York, Guilford Publications.
- Rose, D. H., Harbour, W. S., Johnston, C. S., Daley, S. G., & Abarbanell, L. (2008). Universal design for learning in postsecondary education: Reflections on principles and their application. In S. E. Burgstahler, & R. C. Cory (Eds.), *Universal design in higher education: From principles to practice*. Cambridge, MA: Harvard Education Press.

SELECTED EDUCATIONAL SOFTWARE DEVELOPMENT

- The UDL Curriculum Toolkit (Version 1.4) [2012 Computer Software]*. Wakefield, MA: CAST, Inc. Retrieved from <http://udl-toolkit.cast.org>
- ReadAbout*. Scholastic Inc. (2007) New York, NY.
- Thinking Reader*. Scholastic Inc. (2004) New York, NY.
- Bobby™, 3.2*. Watchfire Corporation (1996-2000) Waltham, MA.

eReader™. CAST, Inc. (1996-2000) Peabody, MA.
ULTimate CaptionWorks™. (1997) Peabody, MA: Universal Learning Technology, Inc.
WiggleWorks: Scholastic Beginning Literacy System. Scholastic, Inc. (1994) New York, NY.

PUBLIC POLICY INITIATIVES

United States Congressional Staff. Briefing on Universal Design for Learning and its Implications for No Child Left Behind Reauthorization. Dirksen Senate Office Building. February 23, 2007.

Commission on No Child Left Behind: Testimony given at a hearing held by the Commission in its efforts to examine the impact of the No Child Left Behind Act (NCLB) toward improving academic achievement for all students and closing the achievement gap. August 2, 2006.

United States Senate Committee on Appropriations, Subcommittee on Labor, Health and Human Services, and Education: Testimony given at a Hearing on Education Technology, July 25, 2001.

Texas Task Force on Electronic Textbook Accessibility: Member of Task Force, which prepared a report for the Texas Legislature explicating the advantages of electronic textbooks for people with disabilities. February 26, 1996.

Council of Exceptional Children (CEC): Advisor to CEC in its efforts to adopt and disseminate principles and national guidelines of universal design in education for educators, publishers and policy makers. September 1995.

ASSOCIATIONS, BOARDS, AND COMMITTEES

Member of the Technology Work Group (TWG) for the National Educational Technology Plan. *U.S. Department of Education*. 2009. Washington, D.C.

Education Advisory Board Member. *National Down Syndrome Society (NDSS)*. 2009–Present.

Advisory Board Member. *International Mind, Brain, and Education Society*. 2008–Present.

Professional Advisory Board Member. *National Center for Learning Disabilities (NCLD)*. October 2005–2011.

Advisory Board Member. *The Concord Consortium*. June 2005–Present.

Associate Editor, *Journal of Special Educational Technology*.

Member of the National Committee of Visitors. *National Science Foundation's Directorate of Human Resource Development*. May 3, 2000. Arlington, VA.

CURRICULUM VITAE

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Role at CAST: Director of Technical Assistance, CAST and National Center on Accessible Instructional Materials

Role on Center for Inclusive School-Wide Reform: Consultant, Technical Assistance

EDUCATION AND TRAINING

- Doctor of Education, Special Education Personnel Preparation with emphases on Assistive Technology and Distance Education Strategies., University of Kentucky, Lexington, Kentucky, December, 2004
- Assistive Technology Practitioner Credential: Rehabilitation Engineering and Assistive Technology Society of North America (RESNA), 2002
- Post-Master's coursework in Bilingual Education, Early Childhood Special Education, Assistive Technology and Educational Supervision (1975-1990)
- Master of Education, Curriculum and Instruction, Early Childhood Education. Florida Atlantic University, Boca Raton, Florida. June 1972
- Bachelor of Arts in Education, Elementary and Early Childhood. University of Florida, Gainesville, Florida. March, 1968

PROFESSIONAL ACTIVITIES AND EXPERIENCE

- October 2009-Present: **Director of Technical Assistance:** Center for Applied Special Technology (CAST). Wakefield, MA.
- October 2009-Present: **Director of Technical Assistance:** National Center on Accessible Instructional Materials at CAST. Wakefield, MA.
- October 2009-Present: **Formative Evaluator:** NIMAS Development Center at CAST.
- October, 2007-October, 2009: **Project Manager:** The Accessible Instructional Materials (AIM) Consortium at CAST. Wakefield, MA.
- 1997-October, 2007: **Independent Professional Developer and Consultant:** Assistive Technology and Leadership, Lake Jackson, TX.
- 2005-Present: **Conference Education Program Chairperson:** Assistive Technology Industry Assoc., Chicago, IL.
- Summer/Fall, 2007: **Collaborative Content Specialist** for *Accessible Instructional Materials Resource Guide for Texas Schools*. Currently in development for Texas Assistive Technology Network, led by Region IV Education Service Center (Behnke) Houston, TX.
- Spring, 2007: **Content Specialist and Presenter** for enhanced pod cast, *Making Decisions about Accessible Instructional Materials; Implications for CASE Committees*, Indiana Department of Education / Division of Exceptional Learners. Available online at <http://www.idealindiana.com/ideal/partners/patins/nimas.php>.
In association with PATINS and IDEAL

- 2005-2006: **Content Specialist** for Texas Assistive Technology Network AT Training Series: *Assistive Technology Evaluation: A Team Perspective* module and *Assistive Technology Implementation* module, Region IV Education Service Center (Carl) Houston, TX. Modules available online at <http://www.texasat.net>
- 2005-2006: **Primary Investigator** of ATSTAR program evaluation. (AT Strategies, Tools, Accommodations, and Resources). Knowbility, Inc. Austin, TX.
- 2004-2005: **Project Director** for ATSTAR Implementation (Assistive Technology Strategies, Tools, Accommodations, and Resources). Knowbility, Inc. Austin, TX.
- 2002-2006: **Faculty Associate**, Johns Hopkins University and Center for Technology in Education, (Castellani), Baltimore, MD.
- 2002-2006: **Online Mentor**, Commonwealth Center for Instructional Technology and Learning (Berdine), Dept of Special Education and Rehabilitation Counseling, University of Kentucky, Lexington, KY.
- 2001-2005: **Consultant** to the National Assistive Technology Research Institute (Hasselbring and Lahm). University of Kentucky, Lexington, KY.
- 2001-2003: **Content Specialist and Consultant** to Preparing Tomorrow's Teachers to Use Technology Grant (Venn), Dept of Education, Valdosta State University, Valdosta, GA.
- 2001-2002: **Content Specialist: Texas 4-Step Model for Assistive Technology Consideration**, Training module co-sponsored by the Texas AT Network, Texas AT Project, and University of Texas, Dept of Special Ed.
- 2000-Present: **Educational Consultant** to Infinetec Division of United Cerebral Palsy of Chicago.
- 2001: **Content Specialist and Consultant** to ATSTAR Project, Austin ISD, Austin, TX
- 1997-2001: **Research Assistant**, Department of Special Education, University of Kentucky, Lexington, KY.
- 1997-2001: **Core Consultant**, Project LINK-US, Education Development Center, Newton, MA.
- 1988-Present: **Invited Speaker and Professional Development Trainer**: Selected examples – New Zealand Assistive Technology Conference, Keynote and Featured Speaker, 2000, 2003, and 2007; National Association of State Directors of Special Education (NASDSE) Satellite broadcast on Assistive Technology and Universal Design for Learning (with Skip Stahl from CAST), 2005; Maryland Instructional Computers Coordinators Association, Featured Speaker, 2003; Texas Partners in Policymaking, 2002, 2003; RESNA, Instructional Course presenter, 2000; Louisiana Assistive Technology Network, Keynote presenter, 2000; Western Carolina Assistive Technology and Augmentative Communication Conference, Keynote presenter, 2000; Assistive Technology Industry Association Conference, 2001, 2002, 2004 and 2005; TAM Conference (Technology & Media Division of CEC), Keynote speaker, 1996, 1999 & 2000; Closing the Gap Preconference, 1995-2006; Oregon TechTrans Summit on Assistive Technology & Transition, Featured Speaker, 1997; Southeast Augmentative Communication Conference, Featured Speaker, 1996; Johns Hopkins Univ./NSDSE Assistive Technology Conference & Exhibition, Luncheon speaker, San Francisco, CA, 1996 & speaker, 1995; Special Education Summer Institute, Alabama State Department of Education, 1995 & 1996; Florida Assistive Technology Impact Conference & TAM, 1995; Technology & Teaching Conference, 1994; Eastern Montana University Augmentative Communication Conference, 1993; CONNSense at University of Connecticut, 1992 & 1996; Baylor College of Medicine/ Veteran's Authority Annual Conference, 1992; Minspeak

- Conferences, 1990, 1991, & 1995; Illinois Speech & Hearing Association, 1990; PennTech & International Society for Augmentative & Alternative Communication Retreat, 1989 & 1991; Greater Houston Chapter of the Autism Society of America, Houston, TX, 1988.
- Fall, 1996 and Winter, 1998: *Facilitator* of assistive technology training sessions on the World Wide Web “READY! SETT! GO! A Virtual Team Meeting Using the SETT Framework” for participants from all over the world. Sponsored and supported by the National Center for the Improvement of Practice (NCIP) in Special Education, Educational Development Center, Newton, MA.
 - 1991-1997: *Educational Specialist* in Assistive Technology, Region IV Education Service Center, Houston, TX 77095.
 - Assisted with statewide leadership in Assistive Technology for Texas Education Service Center Network (Function decentralized to Region IV ESC by the Texas Education Agency in 1996)
 - Developed and implemented collaborative professional development for transdisciplinary professionals and others who support users of assistive technology in a way that develops capacity to improve instruction for all students
 - Provided leadership in the development and operation of the Assistive Technology Resource Center, including activities, equipment, programs, and materials
 - Consulted with school districts and families of students with disabilities regarding acquisition and integration of appropriate technology into curriculum and instruction
 - Encouraged interagency collaboration in planning and implementing programs for people with disabilities
 - 1989-1991: *Regional Consultant* - Houston. Prentke Romich Co., Wooster, Ohio.
 - 1987-1989: *Technology Specialist/ Teacher/Trainer*. Brazosport ISD, Freeport, Texas.
 - 1986-1987: *Early Childhood - Special Education Teacher* (1/2 day), Computer Laboratory Coordinator and Apple Computer Grant Support Team, Brazosport ISD, Freeport, Texas.
 - 1969-1983: *General Education Teacher*, early childhood and elementary grades in Tifton, Georgia; Fort Pierce, Florida, Miami, Florida, and Caracas, Venezuela. 1983: Teacher (Grade 1), Escuela Campo Alegre, Caracas, Venezuela. International school accredited by Southern Association of Colleges and Schools.

PROFESSIONAL SERVICE ACTIVITIES

- Developer and author of the SETT Framework for making effective assistive technology decisions
- Editor of *The TAM Connector*. A publication of the Technology and Media Division (TAM) of the Council for Exceptional Children
- Past President of the Technology and Media Division (TAM) of the Council for Exceptional Children
- Founding member and steering committee member of SLATE: State Leaders of Assistive Technology in Education
- Co-founder and List facilitator of QIAT: Quality Indicators for Assistive Technology Services in School Settings. QIAT webmaster and listserv facilitator (<http://www.qiat.org>)
- Executive Board member, European Schools Project (representing the Technology and Media Division of CEC)
- Executive Board member, AIR Houston, Accessible Internet Rally

- Educational Representative, Test Development & Passing Scores Study Committees, RESNA, 1996
- Developer and facilitator of "PARTNERS", a home/school assistive technology program that consisted of evening open enrichment labs for parents and children and a computer checkout program, 1987-1990
- Author of professional papers, research articles, and text book chapters on the selection, acquisition and effective uses of assistive technology in education

PROFESSIONAL RECOGNITION

- Fellow, Kentucky Challenge Fellowship Grant, University of Kentucky, 2000-2001
- Electronic Learning Magazine Teacher of the Year Program: Distinguished Achievement Award (One of 6 in the nation). Scholastic, New York, 1989
- Teacher of the Year, 1988, Brazosview School and Brazosport ISD, Freeport, Texas
- Teacher of the Year and Nominee for Texas Teacher of the Year, 1988, Brazosport ISD, Freeport, Texas
- Jaycees Outstanding Young Educator, 1973. Tifton, Georgia

SELECTED PUBLICATION

- Bowser, G., & Zabala, J. (2012). AIM for digital equity. *Learning & Leading with Technology*, 16-19.
- Zabala, J., & Carl D. (February/March 2011). The AIMing for Achievement Series, part three: AIM Support at Your Fingertips. *Closing the Gap Solutions* 30(2), 34-36. Online at <http://aim.cast.org/sites/aim.cast.org/files/ClosingtheGap3.pdf>
- Carl D., & Zabala, J. (December 2010/January 2011). The AIMing for Achievement Series, part two: Navigating the decision-making process. *Closing the Gap Solutions* 30(1), 12-15. Online at <http://aim.cast.org/sites/aim.cast.org/files/ClosingtheGap2.pdf>
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- Berdine, W. H., Burlison, R. B., Case, D. A., Liaupsin, C. J., & Zabala, J. S. (1998). Guidelines for distance education program development and administration. In Spooner, F., & Ludlow, B. (Ed.) *Distance Education: A Manual for Administrators and Instructors*. Council for Exceptional Children: Reston, VA
- Bowser, G., Korsten, J., Reed, P., & Zabala, J. (1999). Quality indicators for effective assistive technology services. *TAM Connector*, 11(5), 1-5.
- Rose, D. H., Hasselbring, T. H., Stahl, S., & Zabala, J. (2005). Assistive technology and universal design for learning: Two sides of the same coin. In K. Higgins, R. Boone, & D. Edyburn (Eds.), *The Handbook of special education technology research and practice*. Knowledge by Design, Inc.: Whitefish Bay, WI.
- Scott, T. M., Nelson, C. M., & Zabala, J. (2003). Functional behavior assessment training in public schools: Facilitating systemic change. *Journal of Positive Behavior Interventions*, 5(4), 216-224.
- Texas Assistive Technology Network (2002). *Considering assistive technology in the development of the IEP*. Training module co-sponsored by the Texas AT Network, Texas AT Project, and University of Texas, Dept of Special Ed. Downloaded October 12, 2004 from <http://www.texasat.net/trgmod.htm#considering>.

- Texas Assistive Technology Network (In press). *Assistive technology evaluation: A team perspective*. Training module. Region IV Education Service Center. Houston, TX.
- Zabala, J. S. (1995). *The SETT framework: critical areas to consider when making informed assistive technology decisions*. Houston, TX: Region IV Education Service Center. (ERIC Document Reproduction Service No. ED381962).
- Zabala, J. S. (1996). SETTING the stage for success: Building success through effective use of assistive technology. *Proceedings of the Southeast Augmentative Communication Conference* (pp. 129-187). Birmingham, AL: United Cerebral Palsy of Greater Birmingham.
- Zabala, J. S., Bowser, G., Blunt, M., Carl, D. F., Davis, S., Deterding, C., Foss, T., Korsten, J., Hamman, T., Hartsell, K., Marfilius, S. W., McCloskey-Dale, S., Nettleton, S. D., & Reed, P. (2001). Quality indicators for assistive technology services. *Journal of Special Education Technology, 15*(4), 25-36.
- Zabala, J. S., & Carl, D.F. (2005). Quality indicators for assistive technology. In K. Higgins, R. Boone, & D. Edyburn (Eds.), *The Handbook of special education technology research and practice*. Knowledge by Design, Inc.: Whitefish Bay, WI.
- Zabala, J. S., & Hartsell, K. (in press). Assistive technology: legal and practical issues. In *Technology in Special Education, 4th Edition*. Ed. Jimmy Lindsey. ProEd Publications: Austin, TX