

**SCHOOL BOARD  
FINANCE SUMMARY FORM**

*The purpose of the document is to present the Providence School Board and Finance Committee with the necessary information to make data-informed decisions about the district's spending as it pertains to contracts.*

**Instructions:**

1. Please complete this form as fully and accurately as possible according to the guidance provided in each section.
  - a. The form must be completed if:
    - i. the total of the purchase or contract exceeds \$200,000
    - ii. the contract is for a term of more than one year
    - iii. the purchase or contract was NOT the result of formal competitive bidding or cooperative purchasing (i.e. it is a sole source purchase)
2. Once this form has been completed, send a copy to the Director of Purchasing and the Board Services Team. They will notify you of the next Finance Committee meeting and host a contract presentation review prior. Finance Committee typically meets the second Wednesday of the month. Only purchases/contracts that have already been reviewed and approved by the Superintendent will be scheduled before the Finance Committee.

**Vendor Name:** Dr. Samuel Ortiz

**Amount:** \$30,000

**Source of Funds and Fiscal Year:**      District-Based    School-Based

**Check box for fiscal year:**             FY22    FY23    FY24

**Purchase or Contract:**                 Purchase    Contract

**Length of Contract (list start date and end date):** September 1, 2022 through June 30, 2023

**PPSD Contact Name:** Natalie Fleming, Director of Social Emotional Learning & Mental Health

**Contract Type:**      New                     Renewal                     Extension                     Amendment

**Staff Recommendation:**

It is recommended that the Providence School Board approve a contract/purchase with Dr. Samuel Ortiz (vendor name) for professional development and consultation (type of services) amounting in \$30,000.00 (total amount in dollars) for Special Education Department, including managers, collaborative coaches, intervention specialists, school social worker & school psychologists (school name(s)). If approved, the contract will begin September 1, 2022 (date) and end June 30, 2023 (date), approximately.

**Justification of Spending:**

*Provide 5-7 points that support the recommendation as to why funds should be spent this way.*

*Use the prompts to help guide your response.*

- a. *How is this connected to the Turnaround Action Plan/ aligned to the district's vision?*
- b. *Why does the district need this purchase?*
- c. *Why is the dollar amount requested the necessary amount?*
- d. *What are the implications of not spending this money?*

Dr. Ortiz will be delivering professional development and consultation services to PPSD staff. The purpose of this service is to provide Special Education staff with current research on the relationship between language, cognitive, and academic development and how it may be used to guide the activities of pre-referral and post-referral assessment teams. Additionally, Special Education staff will learn current research on language, cognitive, and academic development, and their application to evaluation within a comprehensive, research-based framework for generating valid data to support conclusions and decisions regarding the presence or absence of various types of disorders with multilingual learners. Dr. Ortiz will be scheduled to provide monthly consultation services to train IEP teams throughout the stages of referrals to Special Education, making sure that all relevant information in determining access to consistent instruction, tiered support, impact of language, and necessary relevant information to determine language vs disability is provided at IEP TEAMS.

### **Justification of Vendor Selection**

*Provide 3-5 bullet points that support the recommendation as to how this vendor was selected. You may attach any documents with additional data on their performance (please note below that this information is attached).*

*Use the below prompts to help guide your response.*

- a. Provide a 3-5 sentence summary of the vendor (can cut and paste contract Executive Summary) about who they are and what they do.*
- b. What was the procurement process for selecting the vendor?
  - i. Which PPSD staff members were involved in that procurement process?**
- c. If this is a returning vendor:
  - i. Share a summary of our experience with this vendor.**

This vendor was selected as Dr. Ortiz is the sole source provider.

### **Accountability Measures**

*In 3-5 bullet points, describe the accountability measures that will ensure that the vendor meets all requirements set forth in the contract and that the district is able to maintain a record of the quality of the services. These need to be performance-based in nature. Every contract should include explicit language requiring vendor accountability, i.e. required program evaluation or the submission of a final report summarizing progress against each itemized deliverable. **Note: if this contract is a purchase agreement, you can skip this section.***

*Use the below questions to guide your response.*

- a. Which PPSD staff member will serve as the lead for tracking accountability and performance metrics?*
- b. What accountability measures have you agreed upon in your contract (can copy and paste from draft contract)?*
- c. How is this purchase tied to overall student achievement (refer to TAP specific goals if possible)?*

Natalie Fleming, Director of Social Emotional Learning & Mental Health will serve as the lead for tracking accountability and performance metrics. There will be a Problem of Practice running document that specifically outlines goals through this partnership. Additionally, this is tied to overall student achievement as these session will further participant learning in providing an appropriate education for culturally and linguistically diverse students. Educating culturally and linguistically diverse students present unique challenges in part because certain assumptions key to the manner in which instruction is structured and learning is evaluated do not hold in the case of diverse learners as they do with native English speakers. Failure to appreciate the developmental issues inherent in the interaction between them can lead to problems in the attainment of academic skills for multilingual learners that are often mistakenly attributed to low ability or the presence of disabilities.

**Spending Breakdown**

*In the table below, list the deliverables of the purchase or contract and their associated cost to justify the total cost of the purchase. If easier, please attach an excel file or other document.*

Proposed Budget	Dollar Amount
A total of 100 hours of consultation services @ \$300 per hour	<b>\$30,000</b>
<b>Total</b>	<b>\$30,000</b>

# ORTIZ, DYNDA & ASSOCIATES LLC

115 Forest Ave. Unit 565

Locust Valley, NY 11560

Tel: 917-721-4127

July 28, 2022

Providence Public School District (PPSD)

Office of Student Supports

797 Westminster Street

Providence, RI 02903

Re: August 17-18, 2022 Workshops

To Whom It May Concern:

Pursuant to discussions with Natalie Fleming, Director of Social Emotional Learning and Mental Health and Amy Mellomessenger, this letter certifying sole source is provided in connection with the training and supporting materials to be used for the workshops scheduled on August 17<sup>th</sup> and 18<sup>th</sup>, 2022.

Accordingly, I certify that the goods and/or services identified for the purposes of the training are sole source and are precluded from competition because of the existence of various copyrights. The copyrighted materials used for the purposes of the training include all the following:

Assessment of Culturally and Linguistically Diverse Students – Book  
(Copyright 2005 Guilford Publications)

Handout material: Foundations of nondiscriminatory assessment, including content and information related to first and second language acquisition, educational programming and its relation to academic achievement, developmental perspectives on test performance of English learners and methods for evaluating the impact of cultural and linguistic differences on test performance of English learner.

Ortiz Picture Vocabulary Acquisition Test (Ortiz PVAT) – Test (Copyright 2018 Multi-health Systems)

Handout material: Applications and uses of the Ortiz PVAT in pre-referral contexts (progress monitoring, evaluation of growth) and as a nondiscriminatory measure of English language acquisition. Information on norm sample development, innovations in stratification of language

proficiency, and data regarding reliability and validity evidence in support of the test and its use with English speakers and English learners.  
Essentials of Cross Battery Assessment Third Edition – Book  
(Copyright 2013 John Wiley & Sons Inc.)

Handout material: Procedures, principles, and methods for applying the Dual-Discrepancy/Consistency (DD/C) model of PSW analysis for identification of learning disability and methods for establishing ecological validity related to the consistency between identified cognitive weaknesses and identified academic weaknesses that are empirically supported.

Cross-Battery Assessment Software System (X-BASS) – Software  
(Copyright 2022 John Wiley & Sons Inc.)

Handout material: Procedures and steps for using X-BASS software to assist in organizing diagnostic data (cognitive and academic) and preparing data for basic PSW analyses to ensure adequate representation of all relevant domains of functioning per the referral concerns. Advanced case studies featuring screen-captures of the X-BASS software are also included as illustrative guides for teaching the process and decision-making/interpretive framework.

General slide content and information – Visual graphics and text (Copyright 2022 Samuel O. Ortiz, Ph.D.)

Handout material: Unless otherwise noted and referenced accordingly, all graphics and text presented in the workshops and made available to the participants that is not subject to another copyright is original material that is copyrighted by the presenter (Samuel O. Ortiz) and is proprietary intellectual property.

I certify that the materials and services identified above are sole source, and the items are therefore precluded from competition.

Sincerely,

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Samuel O. Ortiz