

**AGREEMENT BETWEEN
THE SCHOOL BOARD OF SARASOTA COUNTY, FLORIDA AND**

University of South Florida, Sarasota-Manatee

New Memorandum Of Understanding (MOU) Agreement

This Agreement is entered into by and between the School Board of Sarasota County, Florida (hereinafter referred to as School Board), and University of South Florida, Sarasota-Manatee (hereinafter referred to as Recipient) and describes the programs to be conducted by Recipient, and the Recipient's obligations to, among other things, ensure the confidentiality and security of information and data exchanged between the School Board and Recipient.

I. Purpose and Duration of the Study/Project(s)

Pursuant to the Family Educational Rights and Privacy Act ("FERPA"), the School Board may disclose personally identifiable student data to organizations conducting studies for, or on behalf of, the School Board to (a) develop, validate, or administer predictive tests, (b) administer student aid programs, or (c) improve instruction. The project(s) to be undertaken by Recipient meets this standard as the project is intended to study educational outcomes to assist the board in improving instruction to students in Sarasota County. In addition, this partnership is designed to strengthen:

reading interest and attitudes toward learning for select Tuttle Elementary, Gocio Elementary, and Booker Middle School students.

Specific projects include:

- Secret Society of Readers (SSR)
- Inquiry Based Learning (IBL) and Experiential Learning (ExL)
- These projects are all a part of Henson Fund Initiatives (HFIs) for the 2023-2024 school year

These students/programs are expected to be completed by 05/10/2024 and this agreement will terminate on 08/30/2024

In accordance with the Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. §12329; 34 CFR Part 99) student records and all personally identifiable information are Private...filCi.qfu.: confidential and must not be disclosed to any other person or organization without the permission of the district or the Parent.

■ Data Requested

II. Recipient's Obligations Outcome:

Please identify outcome of report and the date of expected completion and return to the school board.

We anticipate this study will result in an Executive Summary and Full Report to be provided to stakeholders at the school level, district level, and to the project funding agency. Additionally, the research team anticipates publishing findings in research and practitioner journals as well as presenting findings at academic conferences.

The outcome report will be provided to The School Board by:

Lindsay Persohn, Ph.D. (study Principal Investigator) or
Cheyl Ellerbrock Ph.D. (study co-Principal Investigator) by
August 30, 2024

Recipient shall:

1. Use personally identifiable information from education records only to meet the purpose or purposes of its study/programs as stated above;
2. Keep all education records strictly confidential and conduct the study in a manner that does not permit personal identification of parents and students by anyone other than representatives of its organization with legitimate interests and further; Respect the privacy of these records and will neither seek to view nor share within Recipient's organization the contents of any records except in the furtherance of the program's implementation, program review, program evaluation nor, disclose the contents of any record to any third party person.
3. Destroy all personally identifiable information when the information is no longer needed for the purposes for which the study/program was conducted. Such destruction will take place within thirty (30) days of the conclusion of the study/program.
4. Refrain from publishing any individual identifiable student or teacher data.
5. Refrain from publishing any reports that use any aggregated student or teacher data unless agreed to by the School Board of Sarasota County.
6. Ensure that data required will be transferred using a secure file sharing service required by the district. All data received from the School Board will be stored on a secure server accessible only to employees with direct involvement in this project.

III. General Provisions

1. The School Board may terminate this Agreement, without cause, at any time by providing written notice to the Recipient. In the event of such termination, all personally identifiable education record information provided by the School Board to Recipient shall be returned by Recipient to the School Board within ten (10) days. Recipient may not retain any copies of such information.
2. The parties are independent contractors in the performance of all obligations hereunder.
3. Any additions, changes, deletions or modifications to this document must be agreed upon in writing by both parties.

4. This Agreement represents the entire agreement between the parties, and no prior or subsequent oral agreements shall be binding upon either of the parties until reduced to writing.

5. This Agreement shall be governed by and construed under federal law and the laws of the State of Florida. The sole and exclusive venue for any action arising from or related to this Agreement shall be in the Twelfth Judicial Circuit Court, in and for Sarasota County, Florida.

6. Any notices to the parties will be sent via U.S. Mail as follows:

If to the School Board:

If to Recipient:

1960 Landings Blvd

8350 N Tamiami Trail

Sarasota, FL 34231

Sarasota, FL 34243

7. Each Party to this Agreement shall be responsible for any liability, claim, loss, damage or expenses, including without limitation, reasonable attorney fees, arising from its negligent acts or omissions in connection with its performance of this Agreement, or its failure to comply with the terms of this Agreement.

8. Recipient's obligations which are continuing in nature shall survive the termination or expiration of this Agreement.

9. Recipient shall comply with Florida's Public Records Law including:

- a. keeping and maintaining public records that ordinarily and necessarily would be required by the School Board in order to perform the service;
- b. providing the public with access to public records on the same terms and conditions that the School Board would provide the records and at a cost that does not exceed the cost provided in this chapter or as otherwise provided by law;
- c. ensuring that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law; and
- d. meeting all requirements for retaining public records and transfer, at no cost, to the School Board all public records in possession of Recipient upon termination of the Agreement and destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. All records stored electronically must be provided to the School Board in a format that is compatible with the information technology systems of the School Board.

IF RECIPIENT HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES TO ITS DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT 941-927- 4009, publicrecordrequest@sarasotacountyschools.net, THE SCHOOL BOARD OF SARASOTA COUNTY, FLORIDA, 1960 Landings Blvd., Sarasota, FL 34231 .

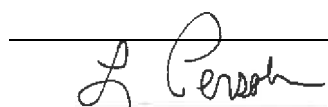
The Parties execute this Agreement voluntarily and intending to be bound by the terms of this Agreement.

I UNDERSTAND AND AGREE TO THE CONDITIONS SET FORTH IN THIS DOCUMENT

Approved as to Form and Legal Content
by Shumaker, Loop & Kendrick, LLP
Attorneys for The School Board
of Sarasota County, Florida
Signed: MRM Date: November 8, 2023

Name (Print) Lindsay Persohn

Date 08/10/2023



Signed (8/10/2023)

ORGANIZATIONAL DATA REQUEST

Instructions: Complete all sections of this application and sign, date, and submit.

SECTION 1 - REQUESTOR INFORMATION

Name Lindsay Persohn

Address 8350 Tamiami Trail, Sarasota, FL 34243

Phone (863) 860-3904

Email lpersohn@usf.edu

Analyst Completing this Form? **D** Yes **Employee ID No. (A#)**

Analyst Name

Phone

Ext

Email

SECTION 2 - STUDY FEATURES

Title What is the title of the study/project(s)?

Building Literacy through Mentorship, Inquiry, and Experiences (Study Title)

Secret Society of Readers (SSR) (project title)

Inquiry-Based Learning (IBL) and Experiential Learning (ExL)

Both projects are a part of the Henson Fund Initiatives (HFI) for the 2023-2024 academic year.

Purpose/Objective In a few sentences, describe why the study is being conducted, please be specific.

The primary purposes of this study include:

- o assess growth in Tuttle Elementary, Gacia Elementary, and Booker Middle students' interests and attitudes towards reading based on program design and participation
- o identify ways in which the HFIs impact interests and attitudes toward literacies and lifelong learning for college-age mentors
- o identify ways in which the HFIs impact learning in ELA and Social Studies (by way of grades, test scores, observational data from teachers, Advisory Board, learners, families, and USF mentors)
- o identify ways in which the HFIs impact civic engagement for learner participants (by way of observational data from teachers, learners, families, and USF mentors; project evaluation rubrics, peer/mentor observations, and Exit tickets)

Questions/Hypotheses List research questions/hypotheses.

We believe the HFIs may have a positive impact on participating learners. The study is designed to inform our understandings related to the primary purposes of the study listed above.

SECTION 3 - METHODS AND PROCEDURES

Provide a **brief** summary of research methods, including specific actions that will be taken to answer the research questions and meet the stated purpose or objective of the study. This may include procedures for research activities such as sampling, identifying participants, collecting data, and analyzing results. When discussing sampling procedures, be sure to describe how potential participants will be identified and describe sampling techniques, indicating whether the research project requires the use of a comparison/control group.

We will utilize a multiple case study approach (Yin, 2003). These cases are bound within the context of Secret Society of Readers (SSR) at Booker Middle School, Tuttle Elementary, and Gacia Elementary. Forty 5th graders at Tuttle and Gacia Elementary; and forty 6th grade and forty 7th grade student participants at Booker Middle School have been selected and targeted by the school district to receive this intervention. Up to thirty USF students have been hired to work as mentors and matched with SSR members based on learning interests. At the start of the program, USF mentors administered the Elementary Reading Attitudes Survey (McKenna & Kear, 1990) to establish a baseline for SSR members' reading interests and attitudes toward reading. The ERAS will be administered again at the end of the school year to determine changes in reading attitudes. In early Spring 2024, USF mentors will participate in focus group conversations designed to identify ways in which mentor/mentee relationships support 5th, 6th, and 7th grade students' outlook on learning and learner identities and ways in which the project impacts interests and attitudes toward literacies and lifelong learning for the college-age mentors. They will also discuss the addition of newly added IBL and ExL initiatives and ways in which they influence critical-thinking and problem-solving skills, as well as student awareness and participation in the local community. From these focus group interviews, interested mentors will be asked to participate in targeted individual interviews to collect additional data. We will conduct focus group interviews with SSR participants in the fall and early Spring 2024, then select interested SSR participants to engage in individual interviews to collect additional data in the Spring. Focus group and individual interview transcripts will be analyzed for themes and impacts of the program. Booker Middle School ELA and Social Studies departmental heads, along with the Career Counselor, Community Engagement Coordinator, and Assistant Principal making up the IBL Advisory Board will be invited to join two focus groups, in the Fall and Early Spring, to gain their understanding of impacts of the three-pronged program. Tuttle Elementary, Gacia Elementary, and Booker Middle parents/guardians of students involved in the program will be asked to provide feedback on their observations around any changes in their student's attitudes toward reading and learning since the start of the program, as well as feedback on the IBL and ExL excursions in the community, via individual interviews or written surveys in Early Spring. Lastly, the administrators and data personnel at Tuttle Elementary, Gocio Elementary, and Booker Middle School, making up the Operating Board will be invited to join two focus groups, one in the Fall and one in the Spring, for their perspectives of all three initiatives via informal quantitative data at the administrative level, in the classroom, and the impact on school climate.

Data Collection Method

Which of these apply to data in the study? Select all that apply.

Existing data stored in SCS databases, is required

e.g., test scores, demographics. This data can only be released if the researcher agrees to the following statements:

I acknowledge I will not request SCS data directly from individual schools.

I understand that all existing data must be requested from the district by completing the Data Element Request portion of this application.

I will complete the Data Element Request Information to identify the specific data and format I will require, with the understanding that I may request up to 10 data elements and no more than the current year plus three past years will be provided.

Data will be collected using instruments (e.g., observations, interviews, surveys). NOTE: Copies of all instruments must be provided with this Request Application.

Protocols and Instruments

If "Data will be collected using instruments (e.g., from observations, interviews, surveys)," fill out the information requested in this section and upload copies of all instruments, including documentation supporting the use of these instruments. See the Applicant Assurances on pages 8 through 10 to ensure the appropriate documentation for published and new surveys is submitted.

Which of these instruments are included in your research project? Select all that apply:

Observation Form

Test

Survey

Interview/focus group

Instruction

Other, specify What is going to be produced as a result of this research? (e.g., journals, audio, video, etc.)

Expected Participant Information Indicate which participant groups will be included, their grade levels or departments, the expected duration of research activities for each participant group, and the number of expected participants. List the duration of each participant group time commitment in minutes/hours. For example, if a 30-minute survey to select students in grades 6-8 is being administered, indicate the duration of research activities as 30 minutes or half an hour. Note, census data collection is not permitted (i.e., do not list "all" for any participant group).

Participants	Describe Participants (include grade, subject taught, school position & specific identifies other than names)	# of Participants	Time Commitment
Student/Grade Levels	participating students in grades 5, 6, 7	up to 120	up to (2) 50 minute interviews
Teachers	ELA teacher, SS teacher, career, community, (3) school data administrator	up to 7	up to (2) 30 minute interviews
SB Administrators	1 each school admin rep	up to 3	up to (2) 30 minute interviews
Parents & Guardians	families of participating students in grades 5, 6, 7	up to 120	up to (1) 15 minute individual interview
DB Administrators			
Other	USF student mentors	up to 30	up to (1) 50 minute interview

Instructional Time Describe how any interruption to instructional time will be minimized. N/A is not an acceptable answer and if this field is left blank, the proposal will **NOT** be approved.

The study will take place during already approved times for the initiatives. No additional instructional time will be needed to conduct the study.

Reporting SCS requires submission of a one-page executive summary within 45 calendar days of the expiration of the Research Notice of Approval. Other than the project's final report and mandatory one-page executive summary, describe the plan for publication and/or presentation of the findings? Include any names (e.g., journals, books) and applicable links.

NOTE: Without prior approval, the district requires removal of the SCS district name, any names of schools, or names of personnel within SGS on any final reporting.

In addition to the Executive Summary and a full report, we anticipate this study will result in multiple conference presentations and research manuscripts. Specifically, we anticipate sharing the study findings at the annual meeting of the American Educational Research Association and the Association for Middle Level Education. Manuscripts will be prepared for the Journal of Adolescent and Adult Literacy, the Middle School Journal, and The Reading Teacher.

Compensation/Incentives Does this study provide compensation or incentives to research participants and/or the school/department included in the research? Use this space to describe any compensation or incentives as *well* as the conditions for receiving such compensation/ incentives.

No compensation will be provided for participation in the study.

SECTION 4 • SECURITY

Risks What are the risks for SCS to participate in this study? **It is not plausible to claim that there are no risks involved in participation.**

For example: "Although all study interactions are those that are normally part of regular classroom activity, teachers may feel minor discomfort when viewing video recordings of their classroom practice."

Risk to all subjects is considered minimal. Participation in the study involves having conversations about the benefits and opportunities of the HFI programming, which participants are already participating. There is the possibility of discomfort in sharing ideas and feelings in focus groups. Participants will have the option to say as much or as little as they would like to share with the group. Our focus group discussion structures will mirror the inherent social risks for students'. We anticipate no greater social or psychological risk for participants than they experience in a typical classroom setting.

Security of Data and Participant Privacy Describe the measures that will be taken to ensure data security, including your website encryption type, collection methods, data storage precautions, or de-identification methods and data destruction method at the end of the study. Note all data must be destroyed after all analysis is completed and the final report is completed.

Digital data collected in this study will be stored on a secure online location (i.e. Box). Print-based data (e.g., consent documents, reading surveys) will be stored in the PI's locked office on the USF Sarasota-Manatee campus. Survey results will be assigned code numbers. Focus group and individual interviews will be video recorded and stored in a secure online location (i.e., Box). Focus group and individual interview transcripts will be generated using Otter.ai software and coded using NVivo or MAXQDA software. Any names appearing on collected physical documents will be anonymized by the research team by assigning students' code numbers. All participants will be invited to choose a pseudonym to be utilized in all study write-ups. Qualitative data collected by the research team will be stored for up to 3 years at the conclusion of the study. After that, data will be deleted or shredded. Raw data will only be shared among the research team (USF and school or district teams). Only an executive summary and anonymized reports will be shared with the project donors.

SCS Staff/Student/family involvement

- O** Yes, my research project involves in-person interaction with SCS staff, students, or families and I understand the badging requirements. See the Security Clearance document for details.
- Q** No, my research project does not involve in-person interaction with SCS staff, students, or families.

SECTION 5 - TIMELINE

Enter approximate dates for each of the following events. If not applicable, type N/A.

1. Data collection - Data from SCS participants

Avoid the beginning/end of school year and statewide testing. See the current year School Calendar and Assessment Calendar.

10/6/2023-5/5/2023

2. Data request- Data from SCS databases

Time needed will vary according to the complexity of the request. Upon approval, allow a minimum of 4 business weeks.

on or around Jan and May or June for quant data

3. Report Writing Analysis and synthesis of findings

7/1/2024-8/30/2024

4. Final Report - Submitted to institution

8/30/2024

5. Required Executive Summary or abstract due to SCS

This should be within 45 days of the expiration of the Research Notice of Approval.

on or around 8/30/2024

ORGANIZATIONAL DATA REQUEST

APPLICANT ASSURANCES

Instructions: Read the following assurances carefully and modify your research request to ensure you meet these requirements. Check each box to indicate you understand and will comply with each requirement of conducting research in Sarasota County Schools, sign, date, and submit the document as indicated.

Requestor Name Lindsay Persohn

By submitting a research request to Sarasota County Schools:

- I understand that all requests will be reviewed by the Sarasota County Schools (SGS) Research Review Team. The SCS Research Review Team will be the final decision-making body, either approving or denying the request.

- I acknowledge that I have included all required documents and I understand that missing or incomplete information will result in immediate denial.

- I understand that contact with schools/departments and/or potential participants is considered a research activity and cannot occur until a Research Notice of Approval is granted by the SCS Research Review Team.

Data Requests

- I understand that information available through SCS is, by federal and state law, confidential and shall be used only for the authorized purpose. Under no circumstances shall records and reports be released by SGS to any party unless such release is in strict accordance with the provisions, and to the entities identified in, the Family Educational Rights and Privacy Act (FERPA) 20 U.S.G. §12329; 34 CFR Part 99, chapter 119 and section 1002.22, Florida Statutes; and SGS School Board Policies.

- I acknowledge separate obligations in accordance with the requirements of these provisions by establishing duties of confidentiality, privacy, and nondisclosure. The information released by SGS will be used by me for generating aggregate statistics that will be used to evaluate educational programs or needs in Sarasota, Florida. A request will only be approved if it is determined to add to the educational knowledge base, meets all local requirements, and does not violate any of the prohibited activities listed below. Requests that have a potential benefit to Sarasota County schools, students and/or staff will be considered more favorably.

- I understand that deliberate or accidental misuse of information may result in loss of access, disciplinary action, dismissal or prosecution under the scope of all applicable federal and state laws and regulations.

- I understand that some data elements are readily available, such as information about assessments, demographics, course enrollment, and accountability. Data requests involving only these data elements will take up to two business weeks. Requests involving other elements will take additional resources to complete:

SCS Staff/Student/Family Involvement

I understand that consent forms and student consent is required for research involving SGS staff, students, or families. Consent forms must be provided for all research participants. If the research will involve students, a parent/guardian consent or permission form must be provided. All consent forms submitted for approval must include the required Sarasota County Schools components which can be found on the Consent - Organizational and Personal Research (029-19-RAE). An Institutional Review Board (IRB) letter does excuse you from this SCS requirement.

I understand that gaining "assent" for participant permission from a child or adult is NOT permitted. "Assent" is a term used to express willingness to participate in research by persons who are too young to give informed consent but who are old enough to understand the proposed research. In general, its expected risks, possible benefits, and the activities expected of them as subjects. If the research will involve students, student consent is required. An IRB letter does not excuse you from SGS requirements. Methods for obtaining and documenting student consent must be determined in conjunction with SGS prior to the start of any research activity in SCS.

I understand that after gaining approval of a research application and before engaging in research activities, each researcher or research team member (applicant, research assistants, collaborators, etc.) who interacts in-person with SCS staff, students or families, during events or otherwise, must be prepared to show the following items at any time. I understand that I will be responsible for the costs involved in the badging process.

- A copy of the Research Notice of Approval
- Security Clearance document

Reporting.

I understand that I must obtain permission to use the SCS district name, any school name, or names of any personnel in research findings prior to dissertation or prospectus, defense, publication, presentation, and/or any correspondence regarding this research project. Without this written permission, the SCS district or any school name should not be included in any written or oral communication or publication regarding this research.

I understand that SCS may request one complete copy of each report or product developed as a part or outcome of the research project. No charge will be made of SCS for any of these reports, copies, or products; and all will be provided within 45 calendar days of the development of the report or product, or within 45 calendar days of the end of the study, whichever comes first.

I understand that SCS requires an Executive Summary or abstract to be submitted within 45 calendar days of the Research Notice of Approval expiration, and that SCS may post the required Executive Summary or abstract on their research website.

Resubmitting or Changing a Request

I understand that I will have 12 months from the date of approval to complete this research project; if additional time is needed, I will need to submit a Research Review Committee Change Request (028-19-RAE) to SCS for an extension.

I understand that I must complete and submit a Research Review Committee Change Request (028-19-RAE) should any part of this application change.

I understand that I am obligated to report unanticipated problems or adverse events related to subject participation that occur in the context of an ongoing or closed SGS-approved research project. If there are any unanticipated problems or adverse events, I will notify SGS via email to research@sarasotacountyschools.net

Survey/Interview Protocol Use

I understand that each request can only submit up to three interview protocols and/or surveys. The same survey or interview protocols in multiple languages will be considered a single survey.

I understand that the SCS Research Review Team will review each survey submitted and/or interview protocol. The inclusion of any inappropriate content will result in denial.

I understand that the use of published surveys with published statistical documentation are highly recommended. This documentation must be included on the research request form. The researcher must document that they obtained permission from the survey publisher. The associated institution must sign off that such permission was obtained.


a I understand that any modification of published surveys must be noted. The researcher must document that they obtained permission from the survey publisher. The associated institution must sign off that such permission was obtained.

If the survey is newly created by the researcher, documentation of how it was piloted and reviewed must be included. The associated institution must sign off that the survey was piloted.

If a survey is in any language other than English, a translation of the survey must be provided. The researcher must document this on the research request form. The associated institution must sign off that the translation was accurate and error free. **12**

Prohibited Activities

- I understand that I cannot begin a research project without first receiving district permission via the district research request process.
- I understand that I cannot recruit or contact students or staff *via* county email or district mailboxes.
- I understand I cannot access ANY staff or student data without direct district approval obtained through this research process. I understand that even if a district employee has access to student or staff data as a result as their normal employment duties, this is still prohibited for personal research, and employees are only permitted to access data as a job function only, it should never be used for personal benefit.
- I understand that I cannot contact students, communicate with students, survey students or access ANY of their school or personal data without first obtaining parental or guardian written permission via a district approved informed consent form.
- I understand that I cannot make any request that interrupts instructional time.



Signed (8/10/2023)

* I acknowledge by typing my name above, my electronic signature shall be deemed to have been "signed" and will constitute an "original" when printed from electronic records. Forms submitted without a signature will be returned without review.