

Jan Upton, Ph.D.

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CAREER HIGHLIGHTS

Jan Upton received degrees in Sociology at the University of North Carolina at Chapel Hill (completed B.A. in 1982 with highest honors, M.A. in 1985, and Ph.D. in 1994). Her background in applied research spans more than 25 years and includes experience in welfare reform (1986-88), mathematics and science reform (1990-present), and higher education and institutional research (1996-present). She has been a co-writer and evaluator on funding proposals ranging from \$50,000 to over \$20 million in annual funding. Dr. Upton established Institutional Research Consultants, Ltd. (IRC) in 2000. IRC works closely with higher education faculty and other education service providers, helping them design evaluation plans, collect data, write reports, and communicate effectively with funding agencies. Dr. Upton is a recipient of the 2005 Ohio Program Evaluators' Group (OPEG) Evaluation Recognition Award and 2010 OPEG Roberta O'Keefe Service Award. She served on the OPEG Board for four years (Secretary, 2006-2010). She is a member of the American Evaluation Association (AEA) and OPEG.

EXPERIENCE

President and Founder, Institutional Research Consultants, Ltd. - Columbus, Ohio (2002-present) and Raleigh, NC (2000-2001). Private research firm that provides evaluation and institutional research services to universities, colleges, schools, and other educational service providers. Current clients include American Institutes for Research, Columbus City Schools (CCS), Columbus Education Association (CEA), Ohio Wesleyan University, Otterbein University, New York University, and The Ohio State University (OSU).

Education Research Consultant - Columbus, Ohio (1992-1995); Somerville, New Jersey (1995-1996); and Raleigh, NC (1996-2000 on a part-time basis). Provided evaluation services to education reform projects. Contracts: Rutgers University, Miami University, Horizon Research Inc., and Ohio Wesleyan University.

Director of Planning and Analysis, St. Augustine's College - Raleigh, North Carolina. 1996-2000. Conducted institutional research for historically black college with enrollment of 1,600 students. Point person for all data requests (reports to federal and state agencies as well as national publications). Prepared Facts Books and other statistical reports to facilitate strategic planning. Co-writer and internal evaluator on numerous grants (over \$2 million in revenue) and a \$12 million bond issue for the college.

Evaluation Specialist, Rutgers, the State University of New Jersey - Piscataway, New Jersey. 1995-1996. Internal evaluator for New Jersey's Statewide Systemic Initiative. Designed, implemented, and processed all internal research, providing reports to the National Science Foundation (NSF) and the New Jersey Department of Education.

Research Associate, Horizon Research, Inc. - Chapel Hill, North Carolina. 1990-1992. Documented and evaluated activities of major nationwide curriculum reform efforts directed by the National Science Teachers Association, the National Council of Teachers of Mathematics, and NSF.

Research Associate, Manpower Demonstration Research Corporation - New York City. 1986-1988. Coordinated data analysis of experimental studies evaluating the impact of job training and welfare reform for welfare recipients and high school dropouts.

EDUCATION

The University of North Carolina at Chapel Hill, North Carolina. Ph.D. in Sociology, 1994 (Area of Specialization: Social Stratification); M.A. in Sociology, 1985; B.A. with Highest Honors in Sociology and Political Science, 1982. Chancellor's Award in Sociology, 1982. Phi Beta Kappa, 1982.

Completed Institutional Review Board required Collaborative Institutional Training Initiative (CITI) courses (Human Research on 11/26/08 and Responsible Conduct of Research Curriculum on 1/11/09). Established Federalwide Assurance with OSU in May 2008 (Renewed in May 2011).

IRC PROJECTS

CURRENT

NSF Funding

- 2011-2015 New York University - Measurement Approach to Rational Number (MARN)
- 2011-2014 Ohio Wesleyan University - Ecological Research as Education Network (EREN)
- 2009-2012 OSU - Transforming STEM Assessment Methodologies (a REESE program)
- 2009-2013 Ohio's Sustainable Science and Engineering Talent Expansion Program (OSTEP) – OSU and three community colleges (Columbus State, Stark State, and Washington State)

Ohio Board of Regents (OBR) Funding

- 2010-2012 Otterbein University - Operation Physics
- 2010-2012 OSU-Lima - Teaching Algebra in Context, Community, and Connections (TACCC)
- 2004-2012 OSU - Physical Sciences & Chemistry Modeling

Other Funding

- 2012-2014 American Institutes for Research - Race to the Top (Ohio Department of Education)
- 2011-2013 Columbus City Schools - NASA's K-12 Cooperative Agreements Notice (CAN)
- 2010-2015 Columbus Education Association - The 100% Project (National Education Association)

COMPLETED (PROJECTS SINCE BEGINNING IRC)

- 2011 OSU - Ohio House of Science & Engineering - Online Tutoring and Outreach to High Schools
- 2010-2011 Capital University – INQUIRE, Grades 3-6 Science (OBR)
- 2009-2011 OSU - Earth and Space Science Institute
- 2010 SPEC Associates – Review of SPEC Evaluation Services (Lumina Foundation for Education)
- 2010 PEACE Collaborative (with Usable Research) - Evaluation Planning (federal JAG)
- 2009-2010 TLC - K-3 IMPACT Elementary Math school-based projects (districts; Ohio 2004-2009)
- 2009-2010 OSU - Materials Science and Engineering Research Center (MRSEC) outreach programs
- 2007-2010 CCS - Science Works - Math Science Partnership (Ohio and federal)
- 2007-2010 John Carroll University - Working in Informal Science Education (NSF)
- 2003-2010 OSU - GK-12 Fellows Program (NSF)
- 2007-2010 Ohio Wesleyan University - Various programs (university, private, and NSF funding)
- 2006-2009 CCS - COMET - Math Science Partnership (Ohio Department of Education and federal)
- 2009 OSU DNA Workshops (part of House of Science initiative – university funding)
- 2007-2009 Ohio Academy of Science - Young Buckeye STEM Scholars (Ohio)
- 2007-2009 CCS - Math and Science Leadership Specialist Program (district)
- 2006-2008 Case Western Reserve University - Center for Layered Polymeric Systems (NSF)
- 2006-2008 Family Violence Prevention Project of Hamilton County (YWCA - private)
- 2003-2007 Duke University's Project H.O.P.E. (W.K. Kellogg Foundation)
- 2007 Otterbein College's Cognitive Guided Instruction (CGI) math coach project with CCS (OBR)
- 2007 North Carolina State A&T University's The Center for Student Success program (university)
- 2007 CCS Professional Learning Communities and Formula Writing (district)
- 2006 The Singing Angels (community singing program) in Cleveland, Ohio (private)
- 2006-2007 OSU's Early Childhood Science and Mathematics Institute (OBR)
- 2006-2007 Ohio Dominican University's Perry County Mathematics Collaborative (OBR)
- 2005 OSU's Environmental Molecular Science Institute's Teacher Workshops (NSF)
- 2005-2006 Schools of Promise case studies for the Ohio Department of Education (Ohio)
- 2005 Report on accreditation and licensure prepared for Humansoft in Kuwait (private)
- 2005 OSU's Chemistry Department's WOW Program (private)
- 2004-2006 CCS LACES Reading Program (district)
- 2004-2005 Assistance to Belmont Abbey College's development of a new master's level program (college)
- 2004 External evaluation services to the Science & Mathematics Network OMAP Partnership (Ohio)
- 2003-2004 OSU's Environmental Molecular Science Institute's (EMSI) Student Scientists (NSF)

COMPLETED (PROJECTS SINCE BEGINNING IRC) - CONTINUED

- 2003-2005 John Carroll University and Case Western Reserve University Hierarchical Learning Ensembles (NSF)
- 2002-2006 North Carolina Central University's Project C.A.R.E. (W.K. Kellogg)
- 2002-2007 Ohio's Challenge Grant Alternative Education Program and Partnerships for Success (Ohio)
- 2002-2003 CCS Alternative Teacher Certification Program (district)
- 2002 United Way of Central Ohio and Private Industry Council's Summer Youth Employment Pilot (private)
- 2002-2006 Evaluation of CCS Urban Systemic Program (NSF)
- 2001-2002 IR and report writing assistance to North Carolina Central University (university)
- 2001 Assessment planning assistance to Newberry College prior to SACS review (college)
- 2001 Assessment planning assistance to Belmont Abbey College during SACS review (college)
- 2000-2001 Analysis of low-income housing contracts for law firm of Hartselle and Whiteman, LLP (private)
- 2000 Peer review of North Carolina A&T State University's Institutional Research Office (university)
- 1995-2001 Evaluation of STEM programs at Ohio Wesleyan University and OSU-Newark (OBR)

PROFESSIONAL MEMBERSHIPS

American Evaluation Association (AEA)

Ohio Program Evaluators' Group (OPEG); Roberta O'Keefe Service Award, 2010; Evaluation Recognition Award, 2005; OPEG Board of Trustees Secretary, 2006-2010; Program Committee, 2006-2009.

IRC PUBLICATIONS AND PRESENTATIONS

Presentation with Diane M. Wright, "Evaluation Planning: Internal Processes In Community Mental Health & A Consultant's Experience Evaluating Education Programs" at OPEG Fall Workshop on Nov. 20, 2009.

2009 Final report for Ohio Academy of Science's Young Buckeye STEM Scholars

<http://www.ohiosci.org/YBSTEMSFinalEvaluation.pdf>. Lynn Elfner, CEO, incorporated findings into two presentations: 2009 Sigma Xi Annual Meeting in Houston and 2010 AAAS Annual Meeting in San Diego.

Presentation with Rachel Holbert, Jerry Bean, Darryl Lang, and Charles Partridge, "Surviving and Thriving as an Evaluation Consultant in Lean Economic Times" at OPEG Spring Exchange on May 15, 2009.

Presentation with Janice Chappell and Tania Jarosewich, "The Challenge of Writing for More than One Audience: Our Experience with the Schools of Promise Case Studies" at OPEG Spring Exchange on May 18, 2007.

Presentation with Jere Boyer, Tom Archer, and Nancy Hood on Institutional Review Boards at the OPEG Fall Workshop on November 6, 2006.

Presentation with Janice Chappell, Kimbe Lange, and Jim Oyster, "Leadership Strategy for Student Success: Teaming Special Education/Intervention Teachers." OAASFEP (Title 1) Conference on October 11, 2007.

Fall 2006. With Stephen C. Maack, "Collaborative Relationships in Evaluation Consulting" in New Directions for Evaluation, (Number 111).

March/April 2006. With Gregory A. DiLisi and Steven J. Eppell, "Hierarchical Learning Ensembles: Team Building for Undergraduate Scientists and Engineers" in Journal of College Science Teaching (Volume XXXV, Number 5).

2005 Eight case studies and cross-site for the Ohio Department of Education's "Schools of Promise." IRC's Reading/Language Arts case studies are mid-way down the page.

<http://education.ohio.gov/GD/Templates/Pages/ODE/ODEDetail.aspx?page=3&TopicRelationID=1677&ContentID=4082&Content=72711>. IRC did a presentation with two of the participating principals at the Ohio Association of Administrators of State and Federal Education Programs (OAASFEP) in October 2006.

2003-2004 Assistance with presentation and identification of data resources for Governor's Office, State of Ohio, Child Well-being Commitments project. Presentations on data analysis tools developed for Partnerships for Success for The Center for Learning Excellence at The Ohio State University.

2002-2007 Prepared Annual Reports for Ohio's Challenge Grant Alternative Education Program
<http://cle.osu.edu/wp-content/uploads/2006year-endreport.pdf>.