



THE SCHOOL DISTRICT OF PALM BEACH COUNTY
PURCHASING DEPARTMENT

School District Consultant Agreement

Agenda Item #	Board Meeting Date 9/16/20
Contact Name and PX Kristen Rulison 432-6345	
School/Department Name Teaching & Learning	

Agreement between the School Board of Palm Beach County and:

Collaborative for Academic, Social, & Emotional Learning

THIS AGREEMENT is entered into this 17th day of September, 2020 by and between the SCHOOL BOARD OF PALM BEACH COUNTY, hereinafter referred to as "Board" and Collaborative for Academic, Social, & Emotional Learning, hereinafter referred to as "Consultant".

WHEREAS, the Board desires to enter into this Agreement with the Consultant, providing, among other things, for the Consultant's services to the Board; and

WHEREAS, the Consultant desires to enter into this Agreement with respect to his/her (hereinafter his) services to the Board, upon the terms and conditions hereinafter set forth;

WHEREAS, the Consultant is specially trained and possesses the necessary skills, experience, education and competency, and licenses or credentials to perform the required services. NOW, THEREFORE, the Board and the Consultant agree as follows:

1. **TERM** The term of this Agreement shall commence on September 29, 2020 and shall end on August 31, 2021

2. **RESPONSIBILITIES OF CONSULTANT**

A. The Consultant shall perform the following services:

Consultant will provide support, training, and guidance in developing and executing a plan for systemic implementation of social and emotional learning (SEL) which may include the following: Direct District consultation and technical assistance to support the advancement of the SEL implementation plan with school level support within the Wallace PSELI pilot sites and District-wide; ongoing implementation and evaluation support; ongoing support for continuous improvement process; consultation on resource alignment; annual professional learning community focused on SEL Continuous Improvement; consultation on Wallace PSELI deliverables. CASEL will also invite District representatives to participate in CASEL events and activities for CASEL Districts: regular webinars with SEL Leads; annual SEL exchange; cross District leadership team events; superintendent's round table; virtual work sessions for SEL & Equity Coaches. See attachment A Scope of Services for detailed information.

B. Time, date, and location of services:

Time & Dates will vary. Virtual support until it is safe to resume face-to-face support as determined by the School District.

3. **CONSULTANT BACKGROUND INFORMATION**

Name of individual who will perform the services Sharon Raven

Education BS, Texas Christian University; MSED University of TX at Austin; Principal Certification; University of TX Austin

Position and Address Director of PSELI Implementation CASEL 815 West Van Buren St, Suite 210 Chicago, IL 60607

Targeted Group/School/Department PSELI pilot staff for student impact; central office SEL Team for District-wide student impact

Approximate Number to be Served 5,000

4. **EVALUATION/FOLLOW-UP METHOD**

Evaluation of the consultant shall be provided by Kristen Rulison, SEL Manager

NAME & TITLE OF THE CONSULTANT'S DISTRICT SUPERVISOR/EVALUATOR

the School District at regular intervals and in accordance with the attached evaluation too, Exhibit "B".

FINANCIAL IMPACT

The financial impact is \$120,000.00

The source of the funds is The Wallace PSELI Foundation Grant

DEPT	FUND	FUNC	ACCT	PROGRAM	BUDG. MGR.	LOCAL CODE	AWARD YEAR
9048	4888	9110	531010	0000	9048	000	2018

5. COMPLIANCE WITH POLICIES AND LAWS/INSPECTOR GENERAL

The Consultant shall comply with all current School Board of Palm Beach County's Policies. The School Board's policies are located at <http://www.palmbeachschools.org/policies/> and are incorporated herein. It shall be the Consultant's responsibility to comply with all School Board Policies as they may be modified from time to time during the term of this Agreement. The Consultant shall abide by all applicable federal, state and local laws.

School Board Policy 1.092, the Consultant(s) agrees and understands that the School District's Office of Inspector General shall have immediate, complete, and unrestricted access to all financial and performance-related records, papers, books, documents, information, writings, drawings, graphs, photographs, processes, data or data compilations, computer hard drives, emails, instant messages, services, and property or equipment purchased in whole or in part with School Board funds ("Information and Records"). Consultant(s) shall furnish the Inspector General with all Information and Records requested for the purpose of conducting an investigation or audit, as well as provide the Inspector General with reasonable assistance in locating assets and obtaining Information and Records that are in the possession, custody, or control of the Consultant(s) or its employees, agents, or subcontractor. Consultant(s) understands, acknowledges, and agrees to abide by applicable portions of School Board Policy 1.092.

The IG may need a meeting with Consultant(s) when the investigation or audit relating to the Agreement is near completion. Consultant(s) must agree to maintain the confidentiality of the preliminary/draft report and the information contained therein pursuant to section 119.0713(2), Florida Statutes, and shall enter into a written confidentiality agreement for the period until the investigation or audit is completed. Consultant(s)'s failure to enter such written confidentiality agreement shall be deemed to constitute Consultant(s)'s waiver of the opportunity to respond to the investigation or audit preliminary report, and the investigation or audit shall be completed without Consultant(s)'s response.

6. COMPENSATION

A. The School Board shall pay the Consultant the maximum sum of (write out amount)

One Hundred Twenty Thousand Dollars and Zero Cents

(\$ 120,000.00), for a maximum of N/A hours which is based upon the following rate schedule.

Daily Rate: N/A Hourly Rate: N/A

Flat Rate: \$10,000.00 per month (see Attachment B)

B. I grant permission for any or all parts of this presentation to be videotaped. ☒ Yes ☐ No

C. No payment shall be made unless and until the Board verifies that all services for which payment is requested have been fully and satisfactorily performed. The Consultant shall submit to the Board any documentation necessary to substantiate the full and satisfactory performance of the services for which payment is requested. The administrator who will verify the services have been performed and approve the invoice is: Kristen Rulison, SEL Manager

7. TRAVEL

If allowable, travel for this Agreement is not to exceed N/A for the term of the Agreement. The Consultant agrees to submit all necessary documentation and proof of expenses in accordance with F. S. § 112.061 and School Board Policy #6.01. The Consultant further agrees that reimbursement for travel must be submitted on travel reimbursement forms with the rates determined by F.S. § 112.061 and School Board Policy 6.01 and must be authorized by the appropriate administrator(s).

8. CONFIDENTIALITY OF STUDENT RECORDS

The Consultant is subject to all School Board obligations relating to compliance with student records confidentiality laws. By signing this Agreement, the Consultant acknowledges and agrees to comply with the Family Educational Rights and Privacy Act (FERPA) and all State and Federal Laws relating to the confidentiality of student records.

☒ Consultant will not receive student information.

☐ Consultant will receive student information and Release or Transfer of Student Information (PBSD 0313) will be completed prior to Consultant receiving student information.

☐ Consultant will receive student Information. Since parental consent will not be obtained and Consultant has legitimate educational interests in the information, Consultant shall hereby be deemed a "school official" in accordance with School Board Policy 5.50 and shall enter into the Addendum concerning student information (PBSD 2220) which is attached hereto and incorporated herein as Exhibit C.

9. BACKGROUND CHECKS/FINGERPRINTING

The Jessica Lunsford Act: All Consultants who are permitted access on school grounds when students are present, who may have direct contact with any student of the District, or who may have access to or control of school funds must be fingerprinted and background checked. Consultant agrees to undergo a background check and fingerprinting if he/she is an individual who meets any of the above conditions and to require that all individuals in the organization who meet any of the conditions to submit to a Level 2 FDLE background check and FBI screening, including fingerprinting by the School District's Police Department, at the sole cost of the Consultant. The report of the results will be immediately transmitted to the School District's Police Department, which shall be the sole determiner of clearance. Consultant shall not begin providing services until Consultant receives notice of clearance by the School District and is issued School District badges. Compliance requiring all Consultants to register as a visitor before entering school property and proper display of School District badges will be strictly enforced. Neither the Board, nor its members, officers, employees, or agents, shall be liable under any legal theory for any kind of claim whatsoever for the rejection of Consultant (or discontinuation of Consultants' services) on the basis of these compliance obligations. The Consultant agrees that neither the Consultant, nor any employee, agent or representative of the Consultant who has been convicted or who is currently under investigation for a crime delineated in section 435.04, Florida Statutes, will be employed in the performance of the contract.

10. PUBLIC RECORDS COMPLIANCE

CONSULTANT SHALL:

- A. Keep and maintain public records that ordinarily and necessarily would be required by the School Board of Palm Beach County in order to perform the service to the Board under this agreement.
- B. Upon request from the Board's custodian of public records, provide the Board with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes or as otherwise provided by law.
- C. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the Agreement term and following completion of the Agreement if the Responder does not transfer the records to the Board.
- D. Upon completion of the Contract, transfer, at no cost, to the Board all public records in possession of the Consultant or keep and maintain public records required by the Board to perform the service. If the Consultant transfers all public records to the Board upon completion of the Contract, the Consultant shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Consultant keeps and maintains public records upon completion of the Contract, the Consultant shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the Board, upon request from the Board's custodian of public records, in a format that is compatible with the information technology systems of the Board.

Failure of Consultant to abide by the terms of this provision shall be deemed a material breach of this Contract. This provision shall survive any termination or expiration of this Contract. In the event of a dispute regarding the enforcement of this provision where the Consultant has unlawfully refused to comply with the public records request within a reasonable time, the School Board shall be entitled to recover its reasonable costs of enforcement, including reasonable attorney's fees from the Consultant as authorized by 119.07(1), Fla. Stat.

IF THE CONSULTANT HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONSULTANT'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, HE OR SHE MUST CONTACT THE PUBLIC RECORDS MANAGEMENT COORDINATOR FOR THE SCHOOL DISTRICT OF PALM BEACH COUNTY BY PHONE AT 561-629-8585, BY EMAIL AT PUBLICRECORDS@PALMBEACHSCHOOLS.ORG, OR BY MAIL AT 3300 FOREST HILL BLVD., SUITE C-110, WEST PALM BEACH, FL 33406.

11. INDEPENDENT CONTRACTOR

The Consultant is, for all purposes arising under this Agreement, an independent contractor under this Agreement. Services provided by Consultant pursuant to this Agreement shall be subject to the supervision of Consultant. In providing such services, neither Consultant nor its agents shall act as officers, employees, or agents of the School Board of Palm Beach County, Florida. No partnership, joint venture, or other joint relationship is created hereby. School Board of Palm Beach County, Florida does not extend to Consultant or Consultant's agents any authority of any kind to bind School Board of Palm Beach County, Florida in any respect whatsoever.

12. OWNERSHIP

- A. With the exception of all pre-existing consultant intellectual property used under this agreement, all reports, studies, information, data, statistics, forms, designs, plans, procedures, systems, and other materials produced by the Consultant under this Agreement shall be the sole and exclusive property of Board. No such materials produced, either in whole or in part, under this Agreement shall be subject to private use, copyright or patent right by the Consultant in the United States or in any other country without the express written consent of Board. To the extent that any of the Consultant's pre-existing intellectual property is embedded in any deliverables. Consultant hereby grants Board a perpetual, non-exclusive royalty free and paid up license to use the pre-existing intellectual property as part of the deliverables.
- B. Board shall have unrestricted authority to publish, disclose, distribute and otherwise use, copyright or patent any such materials produced by the Consultant under this Agreement.

13. INDEMNIFICATION/HOLD HARMLESS

Consultant shall, in addition to any other obligation to indemnify The School Board of Palm Beach County, Florida and to the fullest extent permitted by law, protect, defend, indemnify and hold harmless the School Board, its agents, officers, elected officials and employees from and against all claims, actions, liabilities, losses (including economic losses), costs arising out of any actual or alleged; bodily injury, sickness, disease or death, or injury to or destruction of tangible property including the loss of use resulting there from, or any other damage or loss arising out of, or claimed to have resulted in whole or in part from any actual or alleged negligent act or omission of the Consultant, Contractor, subcontractor, anyone directly or indirectly employed by any of them, or anyone for whose acts any of them may be liable in the performance of the work; or violation of law, statute, ordinance, governmental administration order, rule or regulation by Contractor in the performance of the work; or liens, claims or actions made by the Consultant or any subcontractor or other party performing the work; or claims by third parties (including, but not limited to, Contractor's employees or subcontractors) based upon an alleged breach by Contractor of any agreement with such third party (e.g., an employment agreement or licensing agreement), or allegation that Contractor's provision of services to the School Board pursuant to the Contract infringes upon or misappropriates a patent, copyright, trademark, trade secret, or other proprietary right of the third party. The indemnification obligations hereunder shall not be limited to any limitation on the amount, type of damages, compensation or benefits payable by or for the Consultant for any subcontractor under workers' compensation acts; disability benefit acts, other employee benefit acts or any statutory bar.

Consultant recognizes the broad nature of this indemnification and hold harmless article, and voluntarily makes this covenant for good and valuable consideration provided by the School Board in support of this indemnification in accordance with the laws of the State of Florida. This article will survive the termination of this Contract.

14. WAIVER OF SUBROGATION

In the event of loss, damage or injury to the Consultant and/or the Consultant's property, the Consultant shall look solely to any insurance in its favor without making any claim against the School Board of Palm Beach County. The Consultant hereby waives any right of subrogation against the School Board of Palm Beach County, for loss, damage or injury within the scope of the Performer's insurance, and on behalf of itself and its insurer, waives all such claims against the School Board of Palm Beach County.

NOTE: The terms and conditions of this agreement shall apply with respect to Consultant's operations for any school or ancillary owned by the School Board of Palm Beach County.

15. AMENDMENT

This Agreement may be amended only with the mutual consent of the parties. All amendments must be in writing and must be approved by the Board.

16. ASSIGNMENT

Neither the Consultant nor the Board may assign or transfer any interest in this Agreement without the prior written consent of the other party.

17. GOVERNING LAW AND VENUE

This Agreement shall be construed in accordance with the laws of the State of Florida, without regard to conflict of laws provisions. If any litigation shall result from the Contract Documents, the parties shall submit to the jurisdiction of the State Courts of the 15th Judicial Court and exclusive venue shall lie in Palm Beach County, Florida. BY ENTERING INTO THIS AGREEMENT, CONSULTANT AND SCHOOL BOARD OF PALM BEACH COUNTY, FLORIDA HEREBY EXPRESSLY WAIVE ANY RIGHTS EITHER PARTY MAY HAVE TO A TRIAL BY JURY OF ANY CIVIL LITIGATION RELATED TO THIS AGREEMENT. IF A PARTY FAILS TO WITHDRAW A REQUEST FOR A JURY TRIAL IN A LAWSUIT ARISING OUT OF THIS AGREEMENT AFTER WRITTEN NOTICE BY THE OTHER PARTY OF VIOLATION OF THIS SECTION, THE PARTY MAKING THE REQUEST FOR JURY TRIAL SHALL BE LIABLE FOR THE REASONABLE ATTORNEYS' FEES AND COSTS OF THE OTHER PARTY IN CONTESTING THE REQUEST FOR JURY TRIAL, AND SUCH AMOUNTS SHALL BE AWARDED BY THE COURT IN ADJUDICATING THE MOTION.

18. TERMINATION

The Board reserves the right to terminate this Agreement at any time and for any reason, upon giving thirty (30) days' notice to the other party. If said Agreement should be terminated for convenience as provided herein, the Board will be relieved of all obligations under said Agreement and the Board will only be required to pay that amount of the Agreement actually performed to the date of termination with no payment due for unperformed work or lost profits. In the event School Board determines that the Consultant's services are not being performed as agreed upon, the Consultant shall be deemed to be in default and the Board reserves the right to cancel this Agreement with five (5) days' notice and to withhold all monies due the Consultant until such time as the Board, in its sole discretion shall determine whether to have the contract services completed by others or to cease obtaining the services. In the event that the Board determines to have the Agreement completed by others, the Consultant shall be liable for any costs of completion in excess of that called for in this Agreement. In the event that the Board determines not to have the contract completed by others, the Consultant shall be paid for the services that it satisfactorily performed prior to the termination but, in no event, shall the Consultant be paid for any work not actually performed or for lost profits. In the event that it is determined that a termination for cause was unjustified, the termination shall be deemed a termination for convenience and the Consultant shall be entitled to payment only for work actually performed prior to the termination and to any additional sums.

19. COMMERCIAL NONDISCRIMINATION

Consultant shall not discriminate on the basis of race, gender, gender identity or expression, religion, national origin, ethnicity, sexual orientation, age or disability in the solicitation, selection, hiring, or treatment of sub-consultants, vendors, suppliers, or commercial customers. Consultant shall provide equal opportunity for sub-consultants to participate in all of its public sector and private sector sub-consulting opportunities, provided that nothing contained in this clause shall prohibit or limit otherwise lawful efforts to remedy the effects of marketplace discrimination that has occurred or is occurring in the marketplace, such as those specified in the Palm Beach County School Board Policy 6.143. Consultant understands and agrees that violation of this clause is a material breach of the contract and may result in contract termination, debarment, or other sanctions.

20. LEGAL REVIEW

The parties hereto represent that they have reviewed the Agreement and have sought legal advice concerning the legal significance and ramifications of the provisions contained herein.

THIS SPACE INTENTIONALLY LEFT BLANK

21. SMALL BUSINESS/MINORITY STATUS

The Board strongly encourages active small business and/or minority/women business enterprise participation with all professional services. The Consultant certifies that:

This business is minority/women owned and operated (minimum 51%) ☐ Yes ☒ No

This is a small business enterprise ☐ Yes ☒ No

22. NOTICES

Any notice permitted or required under this Agreement shall be in writing and signed by the party giving or serving the same, and shall be served either by personal delivery or certified mail to the following persons and at the following addresses:

Consultant Business Name

SCHOOL BOARD OF PALM BEACH COUNTY, FLORIDA

Collaborative for Academic, Social, & Emotional Learning

Purchasing Department

3300 Forest Hill Boulevard, Suite A-323

West Palm Beach, FL 33406

Address

Director of PSEL Implementation CASEL 815 West Van Buren St,
Suite 210 Chicago, IL 60607

Telephone # 512-965-0955

Extension

Consultant E-mail (required)

sraven@casel.org

23. MANDATORY CONTRACT DOCUMENTS

This Agreement includes the terms and conditions set forth in this document, and set forth in the following additional documents attached hereto and incorporated herein: (approval will not be granted without these mandatory attachments):

Exhibit A - Beneficial Interest and Disclosure of Ownership Affidavit (PBSD 1997). See Page 6.


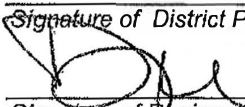
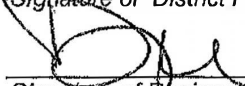
Exhibit B - Provide Consultant Evaluation (PBSD 2075). See Page 7

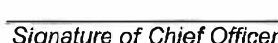
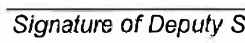
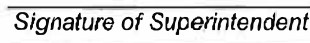
• \$5,000 or less per vendor/fiscal year/location requires consultant and principal/director signature only.

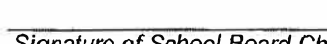
• \$5,001 to \$25,000 per vendor/fiscal year/location requires signature of consultant, principal/director, regional/ assistant superintendent, legal services, chief academic/operating officer, deputy superintendent/chief of schools and superintendent.

• All consultant contracts over \$25,000 per vendor/fiscal year/location must be approved by the Legal Department prior to Board approval. The Board Chairman will sign the contract after Board approval.

NOW, THEREFORE, the parties hereto have affixed their signatures on the day and year first above written.

	7/28/2020	Kitty Rothschild/Chief Operating Officer
Signature of Consultant	Date	Print Name of Consultant
	Date	Print Name of District Principal/Director
	7/30/2020	Diana Fedderman, Teaching and Learning
Signature of Regional/Assistant Superintendent	Date	Print Name of Regional/Assistant Superintendent

	Date	Dr. Glenda Sheffield, Chief Academic Officer
Signature of Chief Officer	Date	Print Name of Chief Officer
	Date	
Signature of Deputy Superintendent/Chief of Schools	Date	
Kimberly Hall	Digitally signed by Kimberly Hall Date: 2020.08.04 12:35:16 -04'00'	
Signature of Legal Services Designee	Date	
	Date	
Signature of Superintendent	Date	

	Date	Frank A. Barbieri, Jr., Esq., Chair
Signature of School Board Chairman	Date	Print Name of School Board Chairman



THE SCHOOL DISTRICT OF PALM BEACH COUNTY
PURCHASING DEPARTMENT

Beneficial Interest and Disclosure of Ownership Affidavit

Bid No. N/A Project No./Title CONSULTANT AGREEMENT

N/A - Non Profit 501(c)3 (Per Legal Not Required)

Corporate Name Collaborative for Academic, Social, & Emotional Learning

DBA (if applicable) CASEL Tax FEIN No. 20-5884201

Before me, the undersigned authority, personally appeared, N/A, ("Corporate Representative") this day of 20 20 , who, first being duly sworn, as required by law, subject to the penalties prescribed for perjury, deposes and says:

1) Corporate Representative has read the contents of this Affidavit, has actual knowledge of the facts contained herein, and states that the facts contained herein are true, correct, and complete.

2) The following is a list of every "person" (as defined in Section 1.01(3), Florida Statutes to include individuals, children firms, associates, joint adventures, partnerships, estates, trusts, business trusts, syndicates, fiduciaries, corporations and all other groups and combinations) holding 5% or more of the beneficial interest in the disclosing entity: (If more space is needed, attach separate sheet)

A. Persons or corporate entities owning 5% or more:		
Name	Address	Percentage
N/A		

B. Persons or corporate entities who hold by proxy the voting power of 5% or more:		
Name	Address	Percentage
N/A		

C. Stock held for others and for whom held:		
1. Name/2. From Whom Held	Address	Percentage
1. N/A		
2.		
1.		
2.		
1.		
2.		

CORPORATE REPRESENTATIVE

By: N/A

SWORN TO and subscribed before me this day of 20 20 , by

N/A. Such person(s) (Notary Public must check applicable box).

☐ is/are personally known to me. ☐ produced a current driver license(s). ☐ produced as identification.

Notary Public

(Print, type, or stamp name of Notary Public)



THE SCHOOL DISTRICT OF PALM BEACH COUNTY
PURCHASING DEPARTMENT

Consultant Evaluation

PO Number _____

School/Department _____ Teaching & Learning

Name of Consultant _____ Collaborative for Academic, Social, & Emotional Learning

Contract Period From _____ September 29, 2020 To _____ August 31, 2021

Rating: 5 - Superior 4 - Satisfactory Plus 3 - Satisfactory 2 - Satisfactory Minus 1 - Unsatisfactory

	5	4	3	2	1
JOB KNOWLEDGE AND SKILL					
1. Technical and procedural know-how to complete the project					
2. Knowledge of his/her specialty area					
3. Ingenuity, creativity, and innovation					
4. General quality of the work performed					
5. Student Assessment					
PRODUCTIVITY					
1. Services provided matched the specifications of the contract					
2. Results produced					
3. Ability to meet goals as scheduled					
4. Success of the project					
COMMUNICATION					
1. Listening skills					
2. Returned phone calls, follow-up information, etc. in a timely manner					
3. Overall communication skills					
4. Overall accessibility/availability					
INTERACTION					
1. Working relationships with teachers and/or students					
2. Ability to work as part of a team					
3. Status updates and information received as the project progressed					

Rating: A - Agree D - Disagree N/A - Not Applicable

	A	D	N/A
1. Demonstrates dependability			
2. Demonstrates ingenuity/creativity/innovation			
3. Performs well under pressure			
4. Effective when presenting ideas orally			
5. Expresses ideas clearly and uses correct grammar in written communication			
6. Listens effectively			
7. Provides feedback in a constructive and timely manner			
8. Is self-reliant and requires little or no supervision			
9. Treats staff and/or students with fairness, respect and integrity			

I would hire this consultant again. ☐ Yes ☐ No

Kristen Rulison, SEL Manager

Signature of Evaluator

Print Name of Evaluator



Collaborative for Academic, Social, and Emotional Learning

SCOPE OF SERVICES - District Partnership

This Scope of Services is agreed pursuant to and hereby made a part of the Consulting Agreement (the “Agreement”), by and between the Collaborative for Academic, Social, and Emotional Learning, an Illinois 501(c)(3) corporation (“CASEL”), and (“the District”).

CASEL will work with the District leadership and staff, as mutually agreed, to provide strategic support, training, and guidance in developing and executing a plan for systemic implementation of social and emotional learning (SEL). CASEL support will be facilitated by a lead consultant who will draw upon additional support from the CASEL network of SEL experts, continuous improvement coaches, consultants, and staff as appropriate. The schedule and frequency of these supports will be determined in partnership with District leaders. The District can expect in-person, phone, and virtual strategic support from CASEL monthly. Travel and lodging for up to 12 visits (on average 2 days each) per year by CASEL personnel to the District are included at no additional charge outside of these contract terms for this purpose. This amount of time and visits may also be completed virtually, as determined by CASEL and District travel and visitor statements.

To ensure maximum benefit from this partnership, CASEL requests that the District provide:

- Opportunities for CASEL staff to meet with District Superintendent 3-4 times annually as part of CASEL coaching visits
- Designation of a cabinet-level SEL champion who will help to guide the systemic SEL work and will meet regularly with the CASEL team as well as the district’s own SEL lead
- Identification of an SEL lead who will act as day-to-day point person for the CASEL partnership and the district’s own SEL work in partnership with their SEL team
- A District SEL leadership committee/council that meets at least 4 X year and includes key Director drivers of the SEL work (Principal Supervisors, Equity, Research and Evaluation, Teaching and Learning) protocols

CASEL will collaborate with the District to develop an actionable strategic plan designed to achieve mutually agreed-upon goals and deliverables.

The CASEL team will review the existing SEL implementation and outcome data, current processes in place, and will co-develop a plan for additions and refinements based on implementation goals. The CASEL team will orient the District to CASEL’s Theory of Action implementation rubric and review essential elements of SEL continuous improvement, identifying which elements the District has existing capacity for and plans to execute on their own, and which elements the CASEL team will support.

Technical assistance activities during the partnership may include activities in the following areas depending on priorities determined during a Partnership Collaboration planning meeting:

For the District:

- Building Foundational Support and Planning:
 - Support in a stakeholder engagement process for the creation of a **districtwide vision** that establishes SEL as essential to the district's educational mission, aligns SEL to core district values and articulates shared language around SEL.
 - Tools and support to assist the District in conducting a comprehensive District **Resources and Needs Inventory** to assess programming and initiatives in place that can be leveraged and spread while identifying areas of need in schools throughout the District.
 - Development of an **implementation and aligned evaluation plan** inclusive of short- and long-term SEL goals and a roll-out strategy for schoolwide SEL implementation including support for Adult and student SEL.
 - Consultation on **Resource Alignment** to support systemic SEL in the District. This might include guidance for:
 - Positioning of the SEL department within organization-wide structures
 - Hiring key central office SEL positions, including sharing relevant resources (e.g., job descriptions, evaluations, interview questions, etc.), reviewing candidate resumes and profiles, participating in the interview process, and/or making final recommendations for final candidates. Any PII CASEL may learn during the course of this process will remain strictly confidential and in the event that any representative of CASEL receives PII for any employee or potential employee, CASEL will promptly destroy the information when the task is completed and will preserve the confidentiality of the information at all times.
 - Budgeting support for staffing and programming needs, including consultation on funding sources and allocation recommendations.
 - Fundraising support, including consulting on fundraising strategy and messaging, availability of speakers, planning resources, and event support to maximize opportunity with local funders. Additionally, CASEL may review grants and applications and provide supporting documentation. When available, CASEL may also bring to the District funding opportunities such as federal- or foundation-supported grants for national CASEL collaboration projects on targeted priority areas.
 - **Communications** support, which may include collaboration to develop and execute an SEL Communications plan, providing expertise on messaging and strategic positioning of SEL and the latest research findings for a variety of audiences (e.g., parents, board, union, funders) and delivery systems (e.g., materials, website, presentations, social media). When available, CASEL may also provide opportunities to highlight the District's SEL work through national media opportunities as part of our collaborations and events.

Strengthen Adult SEL Competencies and Capacity

- Support to **Build Central Office Expertise and Capacity**. Building central office capacity so that they may then support schools is at the core of our partnership with your district. This may include professional learning, consultation, and/or coaching specifically for central office staff. These activities are designed to orient department leaders to SEL, its importance, and considerations for how to embed SEL in the context of their specific work in the District. This also may include in-person or virtual cross-District collaboration with role-alikes in other Districts to share and learn approaches and best departmental practices directly with peers.
- Development of an effective SEL **professional learning** program for school-based staff. This work ensures that explicit learning for SEL is taking place and that SEL is embedded in professional learning across the district. CASEL can also support the measurement of the impact of SEL professional learning across the district. CASEL may help design and/or provide foundational professional learning sessions in partnership with district staff to support staff development of **social, emotional and cultural competence**.
- Develop structures that **promote trust, community and collective efficacy** among staff. This may include opportunities for staff to build supportive professional relationships and a sense of shared purpose, decision-making and efficacy; the use of staff norms and/or shared agreements; or dedicated time to engage in collaborative reflection and problem solving, sharing ideas and responsibility, and community building.

Promote SEL for Students

- Support for the development and implementation of **SEL Learning Standards**, which may include consultation with national SEL standards experts and information about relevant policy work with 40 state departments of education connected to CASEL through our Collaborating States Initiative work. Resources and learnings from our national work can be shared and adapted to inform the District's development and implementation of District-specific SEL learning standards.
- Consultation on the **Adoption of Evidence-Based SEL Programs**, which may include recommendations based on standards, priorities, and budgets. This may also include guidance and/or participation on review committees and implementation planning to ensure buy-in and fidelity of users as well as systems for monitoring, evaluating outcomes, and continuously improving.
- Support for the **Integration of SEL with Existing Priorities and Initiatives**. This consultation can help to facilitate the integration of SEL with equity, academic instruction, discipline policies, teacher and principal evaluation practices, hiring practices, and/or other District initiatives and priorities to ensure the overall District SEL implementation is systemic. Additionally, consultation may be provided to help to develop a multi-tiered system of support (MTSS) for the District to outline how SEL is promoted at Tiers I, II, and III and integrated with academic and behavioral supports.
- Design of **family and community partnerships** for systemic SEL implementation including out of school time and other key community partners. Consultation to support leveraging families' expertise and diversity to ensure that SEL is taught in culturally relevant ways and to develop partnerships that recognize common goals, adopt aligned frameworks and language for SEL, and calibrate on adult behaviors that appropriately model and reinforce SEL for students

- **Ongoing Support for Continuously Improving SEL Implementation**

CASEL will meet quarterly over the calendar year (fall, winter, spring, and summer) with the District's SEL team to support the District SEL team's strategic (and evaluation) planning and goal-setting, review the CASEL District-level implementation rubric at least three times yearly to inform implementation goals, develop measurable action plans to achieve those goals, and track the SEL implementation process and outcomes throughout the year. Additionally, CASEL will provide access to our assessment protocols, tools, and resources (e.g., action-oriented SEL data reporting and associated trainings and companion materials). As mutually agreed upon, CASEL will provide consultation and professional development facilitation around other essential elements of SEL continuous improvement, including establishing, testing, and improving a long-term plan and how to continuously improve SEL at the school level to reach outcomes.

Beyond Technical Assistance

- **A CASEL partnership includes invitation to participate in exclusive CASEL events and activities for CDI Districts, such as:**
 - **Cross-district Leadership team.** Up to 6 consistent District participants will act as a catalyst for systemic, sustained and aligned SEL implementation in their district. The leadership team connects directly to superintendent /cabinet leadership. Consistent membership includes *SEL Lead, Equity Lead, and Research and Evaluation representative, + district-selected members (e.g. SEL or Equity team members.)*
 - **3 in-person (or virtual)** multi-day learning engagements. (Two specific to Leadership Teams from across the nation, plus the *SEL Exchange* described below.)
 - **6 virtual** work sessions. (Variety of whole group, role-alike, and project-aligned small group work.)
 - **CASEL's annual *SEL Exchange***, an international conference. *Superintendent participation is requested for this annual event. Travel group should include SEL Leadership Team. May also include key SEL champions such as principal supervisors, board members, SEL and Equity team members.*
 - Superintendent's Roundtable meeting (one District participant; one night).
 - Coordination and facilitation of visits or connections to other CDI Districts with action plans (4-20 District participants; one to two nights).
 - Regularly scheduled invitational virtual work sessions for cross-district, role-alike groups. For example:
 - District Research and Evaluation staff members** learning community with other Districts, to share learning about topics such as SEL data collection instruments and protocols; data analysis; best practices for reporting and using SEL data; and collecting, analyzing, and communicating about data effectively to stakeholders about the impact of SEL.
 - SEL and Equity School Coaches and/or Department team members** may engage in sharing practical strategies for on-going implementation work (e.g.,

problems of practice, consultancies, shared resources...) and collaborative professional learning opportunities.

SEL and Equity Leads may engage in focused leadership development, collaborative practice development and professional learning opportunities.

Attachment B**Payment
Terms**

The total fee for the services provided under this Agreement shall not exceed one hundred twenty thousand dollars. District shall make monthly payments as indicated below.

Invoice Period	Invoice Date	Amount
September 2020	10/1/2020	\$10,000
October 2020	11/1/2020	\$10,000
November 2020	12/1/2020	\$10,000
December 2020	1/1/2021	\$10,000
January 2021	2/1/2021	\$10,000
February 2021	3/1/2021	\$10,000
March 2021	4/1/2021	\$10,000
April 2021	5/1/2021	\$10,000
May 2021	6/1/2021	\$10,000
June 2021	7/1/2021	\$10,000
July 2021	8/1/2021	\$10,000
August 2021	9/1/2021	\$10,000
Grand Total:		\$120,000

Invoices shall be paid to CASEL within 30 days of receipt. Fees for services performed or requested beyond those set forth in Attachment A and stated in the agreement must be agreed upon in advance by both CASEL and District and shall be set forth in writing in an amendment to this Agreement.

Note: The total fee for the services provided under this Agreement, as stated in Section 4 is a fixed amount. The mix of services provided to the District, or the removal of any possible service listed above from the services provided to the District, will not reduce the total fee nor otherwise impact the cost of this partnership.