



**PERFORMANCE *fact*, INC.**

*Building leadership for courageous and accountable action in public education*

**Scope of Professional Services  
BETHEL SCHOOL DISTRICT (Spanaway, WA)  
Strategic Planning & Alignment**

**BACKGROUND**

This proposal outlines consulting, facilitation and documentation that Performance Fact will provide to **Bethel School District** (Spanaway, Washington) regarding the development of a community-wide Strategic Plan. The proposed scope of services covers the period September 2017 - February 2018. The Project Manager for Performance Fact is Mr. Mutiu O. Fagbayi (President/CEO). The Project Manager for Bethel School District is Dr. Jennifer Bethman (Assistant Superintendent for Secondary Schools).

**PROJECT DELIVERABLES & PROFESSIONAL FEES**

*Please see Exhibit A (attached) for detailed scope of services*

**RESCHEDULING/CANCELLATION POLICY**

Rescheduling/Cancellations of Specific Events/Activities per Contract:

- More than 30 days prior to scheduled date: No additional charge
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**LOGISTICS**

The Client or its designee(s) will oversee all logistics related to meetings, workshops and other gatherings associated with this project, including securing meeting location, room set-up and clean-up, A/V equipment, refreshments, etc.

**PAYMENT SCHEDULE**

Performance Fact will invoice the Client according to the following schedule:

October 2017	25% of total professional fees
November 2017	25% of total professional fees
December 2017	25% of total professional fees
January 2018	25% of total professional fees
<b>TOTAL</b>	<b>\$99,100.00</b>

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If a dispute arises out of or relates to this Agreement or a breach of this Agreement, and that dispute cannot be settled through negotiation, the parties agree first to try in good faith to settle the dispute by mediation through the Commercial Mediation Rules of the American Arbitration Association, before resorting to arbitration. In the event the dispute is not resolved by mediation, the parties agree to resolve the conflict through arbitration under the rules of the American Arbitration Association.

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IN WITNESS WHEREOF, the Parties hereto have each caused to be affixed hereto its or his/her hand and seal the day indicated below.

**BETHEL SCHOOL DISTRICT****PERFORMANCE FACT, INC.**

By:   
Dr. Jennifer Bethman

By: Mutiu O. Fagbayi  
Mutiu O. Fagbayi

Title: Asst. Superintendent of Secondary Schools

Title: President/CEO

Date: 7/25/17

Date: July 25, 2017



Exhibit A

# Moving Forward as One!™

## Strategic Planning Process

### BETHEL SCHOOL DISTRICT

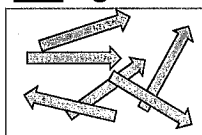
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To be effective, the alignment process must proactively seek out and embrace the diverse voices of the organization's diverse stakeholders. If we want all stakeholders to be committed to and be meaningfully engaged in the implementation of the plan, it is wise to involve each stakeholder in the development of the plan itself.

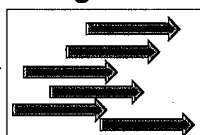
Strategic School Improvement Planning

### Why Plan?

#### Misalignment



#### Alignment



**Alignment:** getting people, process, program and structure on the same page, going in the same direction.

A primary aim of planning is unity of purpose, or *alignment*.

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THINK. BELIEVE. MOVE MOUNTAINS

Strategic School Improvement Planning

### Phases of the Strategic Planning Process

- 1 • "Is everyone ready to go?" [Community mobilization]
- 2 • "Where are we now?" [Assessment of current state]
- 3 • "Where are we going next?" [Core purpose, goals, measures]
- 4 • "Is everyone still with us?" [Stakeholder "reality check"]
- 5 • "How are we going to get there?" [Building blocks: practices, strategies, structures]
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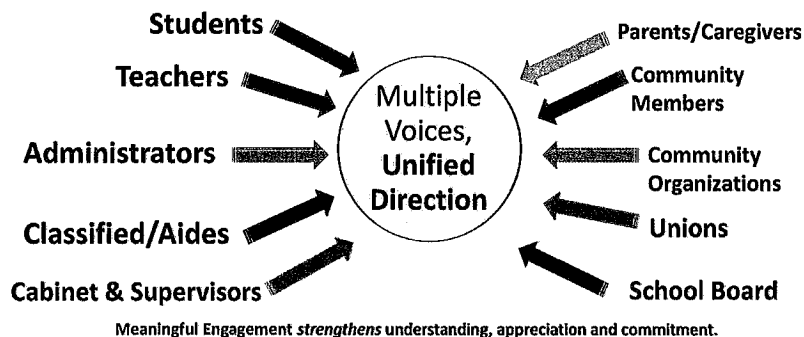
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# EMBRACING VOICES OF DIVERSE STAKEHOLDERS

**MOVING FORWARD AS ONE!** – Performance Fact's strategic planning process – utilizes a series of stakeholder-teams to guide clients through the development of a strategic alignment plan that embraces each community's diverse voices.

## Embracing Diverse Voices & Perspectives



Each school system defines its relevant stakeholders with an appreciation of the paramount importance of broad-based, equitable representation within and across groups. While the configuration of the diverse groups may vary from one system to another, four teams are required in order to ensure equitable, diverse, and informed voice and a well-developed strategic plan:

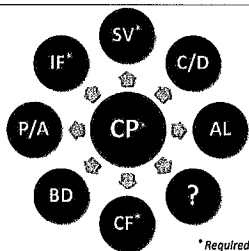
1. Student Voice Team
2. Core Planning Team
3. Instructional Focus Team
4. Community Forum

The *Core Planning Team* cuts across all stakeholder groups. The other teams offer opportunities for "reality check" or focused listening sessions with subsets of the stakeholders, as appropriate. The number and types of "reality check" sessions are customized to the unique context of each community.

## Embracing Diverse Voices & Perspectives

### Core Planning Team (CPT) ...

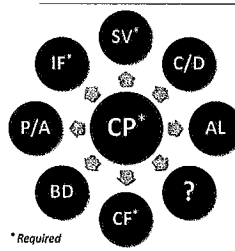
- ☐ Diverse team; includes all stakeholders
- ☐ Stewardship of the process and products
- ☐ "Integrator" of input from all perspectives
- ☐ Co-facilitator of "reality check" sessions
- ☐ 20-150 people



## Embracing Diverse Voices & Perspectives

### "Reality Check" Teams & Listening Sessions ...

- ☐ SV = Student Voice Team
- ☐ IF = Instructional Focus Team
- ☐ C/D = Campus/Department Team
- ☐ P/A = Principals/Administrators Team
- ☐ AL = Alignment Team
- ☐ BD = Board Review Team
- ☐ CF = Community Forums



Each Team is described more fully in the next section.

## MOBILIZING DIVERSE PERSPECTIVES AROUND A UNIFIED DIRECTION: Stakeholder Planning Teams

**Core Planning Team (CP)** consists of a cross-section of all stakeholders, including students whenever possible. Because the team includes internal and external stakeholders, it takes the lead in setting the broad direction for the plan, including the Goals, Measures and Benchmarks of Student Success as well as the "Four Pillars" (or building blocks) of educational practices, programs and structures. This team can have 20-150 members, as appropriate.

**Student Voice Team (SV)** consists of 30-100+ students who represent the diversity among all students (e.g., demographic, academic, attitudinal, dropouts, graduates, etc.). The team serves as the direct voice of the entire student body. Some of the students on this team may also serve on the Core Planning Team. (Optional: For more in-depth understanding, a client may choose to administer customized written surveys of Students and other Stakeholders. Those surveys are priced separately, based on the number of stakeholders, the number of questions, and the level of survey analysis).

**Instructional Focus Team (IF)** takes the lead in identifying the professional practices that will enhance instructional effectiveness. The team consists of at least one teacher from each school, all (or representative sampling) of principals and other school administrators, and district-level teaching-&-learning coaches, facilitators, support staff, etc.

**Principals/Administrators Team (P/A)** provides school and district-level administrators an avenue for staying abreast of and guiding the work of the other groups, particularly since these school and district leaders will be directly responsible for overseeing the implementation of the plan.

**Alignment Team (AL)** consists of key decision-makers or opinion shapers from the key institutions within the community (e.g., school system, parent & community leaders, union, business/higher education, community-based organizations or CBOs, governmental entities, faith-based groups, etc.). The team size, membership, scope of involvement, or formal vs. informal structure depends on the local context and need.

**Community Forum (CF)** provides every resident an opportunity to participate in and influence the direction of the strategic plan *prior to its completion and formal adoption* by the Board. Community Forums are "reality check" sessions that are held at multiple times and in multiple locations throughout the community. The insights from the Community Forums are shared with the Core Planning Team for integration into the strategic plan, as appropriate.

**Campus/Department "Reality Check" (C/D)** offers all district employees – at the school site or in district support position – an opportunity to provide input and feedback prior to the formal adoption of the plan. The structure of the "reality check" is flexible, as long as all staff (or groups broadly representative of all staff) have a chance to voice their perspective. Those perspectives are presented to the Core Planning Team for integration into the formal plan, as appropriate.

**Board Review Team (BD)** ensures that the school Board is continually kept abreast of the progress of the strategic planning process. The updating process could be via formal presentations at periodic intervals, or through ongoing reporting by the Superintendent or Board-designated strategic planning point-person(s). The Board is encouraged to share its views regarding the ongoing planning process and emerging outputs; however, the Board is urged to defer formal action on the strategic plan until it is presented by the Superintendent for formal adoption *at the end of the planning process*.

**Scope of Professional Services - STRATEGIC PLANNING & ALIGNMENT**  
**Bethel School District (Spanaway, WA)**

Components	Level	1	2	3
<b>0. GETTING READY</b>				
Design meetings, formation of Planning Teams, planning calendar				⊙
Compilation of multi-year student data (academic, social-emotional, resiliency)				⊙
Assessment of professional practices and instructional effectiveness				⊙
Assessment of educational programs, supports, and services				⊙
WE HEAR YOU! – Student voice*				⊙
WE HEAR YOU! – Stakeholder's Voice (non-student) *				
<b>1. STUDENT LEARNING</b>				
Trust: From the A-Frame to a Bridge™				⊙
Analysis of student achievement data (using 4-Lens® protocol)				⊙
Goals, Measures & Benchmarks of Student Success				⊙
<b>2. INSTRUCTIONAL EFFECTIVENESS</b>				
Root-cause analysis of current state of student achievement				⊙
Clarification of the "Four Pillars" of professional practices and programs				⊙
Articulation of the professional practices for instructional effectiveness				⊙
<b>3. EMPOWERING INFRASTRUCTURE</b>				
Identification of educational programs				⊙
Ensuring empowering supports for schools				⊙
Ensuring excellence in system-level operations and services				⊙
<b>4. STAKEHOLDER PARTICIPATION &amp; "REALITY CHECK"</b>				
Facilitation of Planning Teams				⊙
Preparation of <i>Briefing Packets</i> for stakeholder "reality check"				⊙
Facilitation of Community Forums and stakeholder "reality check" sessions				⊙
<b>5. REPORT-PREPARATION AND ROLL-OUT</b>				
Preparation of custom Strategic Plan report for Leadership and Planning Teams				⊙
Facilitation of strategic plan roll-out to selected audiences (# groups)				⊙
Customized transition-to-implementation framework				⊙
<b>6. FACILITATION, CONSULTATION &amp; RESOURCES</b>				
24/7 access to Eye on the Goal™ online tools and resources (# of login ID's)				⊙20
Total number of on-site visitation-days (for facilitation, consultation, etc.)				7-10
Total number of hours of "virtual" interactions (e.g., conference calls)				~45

\*Focus with selected students; customized survey for all students in Grades 3-12.

\*Customized survey with other stakeholders (e.g., teachers, staff, admin, community optional; additional professional fees apply).

# Strategic Planning Calendar (v072417)

Day	Date	Time	Team/Focus	Est'd # of Participants
--	Aug 2017	TBD	<b>C&amp;I / Educational Services</b>	-
--	Sep, 2017	TBD	<b>Student Voice</b>	All Students in Grades 3-12
Thu	Oct 12, 2017	AM, and PM	<b>Student Voice</b>	~150 students
Fri	Oct 13, 2017	AM	<b>Student Voice</b>	~150 students
Wed	Oct 18, 2017	8:00AM – 3:30PM	<b>Core Planning Team - #1</b>	60+
Thu	Oct 19, 2017	7:00AM– 7:45AM	<b>Alignment Team - #1</b>	15+
Thu	Oct 19, 2017	8:00AM – 3:30PM	<b>Core Planning Team - #2</b>	60+
Wed	Nov 8, 2017	8:00AM – 3:30PM	<b>Core Planning Team - #3</b>	60+
Wed	Nov 8, 2017	3:30PM – 4:00PM	<b>Leadership Team - #1</b>	60+
Thu	Nov 9, 2017	7:00AM– 7:45AM	<b>Alignment Team - #2</b>	15+
Thu	Nov 9, 2017	8:00AM – 3:30PM	<b>Core Planning Team - #4</b>	60+
Wed	Nov 29, 2017	8:00AM – 3:30PM	<b>Instructional Focus Team</b>	50+
Wed	Nov 29, 2017	6:00PM– 8:00	<b>Community Forum</b>	?
Thu	Nov 30, 2017	7:00AM– 7:45AM	<b>Alignment Team - #3</b>	15+
Thu	Nov 30, 2017	8:00AM – 3:30PM	<b>Instructional Focus Team</b>	50+
Thu	Nov 30, 2017	6:00PM– 8:00PM	<b>Community Forum</b>	?
Wed	Dec 13, 2017	8:00AM – 2:30PM	<b>Core Planning Team - #5</b>	60+
Wed	Dec 13, 2017	2:45PM – 4:00PM	<b>Leadership Team - #2</b>	60+
Wed	Jan 10, 2018	2:45PM – 4:00PM	<b>Leadership Team - #3</b>	60+
TBD	Nov, Dec 2017 (flexible)	TBD	<b>Each School; Each Department</b>	?

TBD	Jan. 2018	TBD	<b>Core Planning &amp; Instructional Focus Teams</b>	<ul style="list-style-type: none"> <li>Review of draft strategic plan; recognizing Core Planning Team and Instructional Focus Team for their service</li> </ul>	100+
TBD	Jan, 2018	TBD	<b>Board Approval</b>	<ul style="list-style-type: none"> <li>Formal Board presentation</li> </ul>	?
Wed	Feb 14, 2018 <i>tentative</i>	2:45PM – 4:00PM	<b>Leadership Team - #4</b>	<ul style="list-style-type: none"> <li>District-wide leadership team (school-level and district/central office level)</li> </ul>	60+

## Professional Fees

Strategic Planning (Level 3 services)	\$96,370.00
Customized <b>Student</b> Survey (Grades 3-12)	\$7,250.00
<i>Less Discount</i>	(\$4,520.00)
<b>Total Professional Fees</b>	<b>\$99,100</b>





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By: Mutiu O. Fagbayi  
Mutiu O. Fagbayi

Title: Asst. Superintendent of Secondary Schools

Title: President/CEO

Date: 7/25/17

Date: July 25, 2017



**Exhibit A**

# Moving Forward as One!™

## Strategic Planning Process

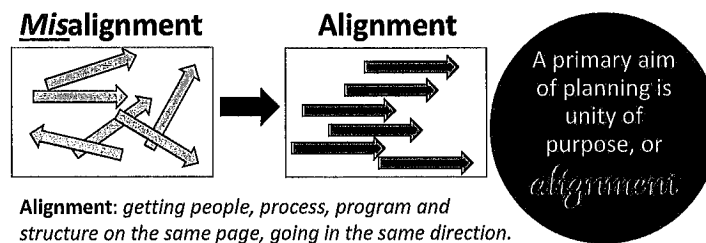
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Strategic School Improvement Planning

### Why Plan?



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Strategic School Improvement Planning

### Phases of the Strategic Planning Process

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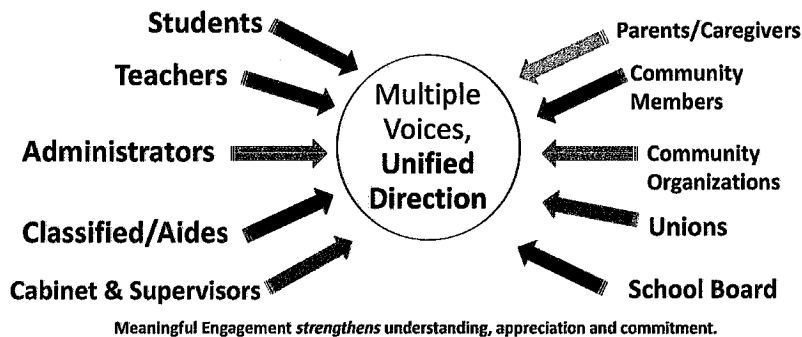
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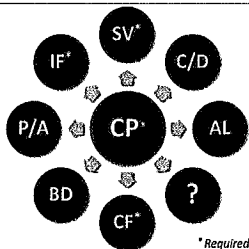
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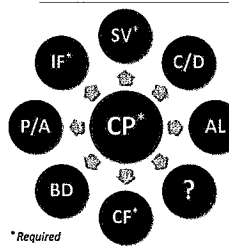
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Assessment of educational programs, supports, and services				⊙
WE HEAR YOU! – Student voice*				⊙
WE HEAR YOU! – Stakeholder's Voice (non-student) *				
<b>1. STUDENT LEARNING</b>				
Trust: From the A-Frame to a Bridge™				⊙
Analysis of student achievement data (using 4-Lens® protocol)				⊙
Goals, Measures & Benchmarks of Student Success				⊙
<b>2. INSTRUCTIONAL EFFECTIVENESS</b>				
Root-cause analysis of current state of student achievement				⊙
Clarification of the "Four Pillars" of professional practices and programs				⊙
Articulation of the professional practices for instructional effectiveness				⊙
<b>3. EMPOWERING INFRASTRUCTURE</b>				
Identification of educational programs				⊙
Ensuring empowering supports for schools				⊙
Ensuring excellence in system-level operations and services				⊙
<b>4. STAKEHOLDER PARTICIPATION &amp; "REALITY CHECK"</b>				
Facilitation of Planning Teams				⊙
Preparation of Briefing Packets for stakeholder "reality check"				⊙
Facilitation of Community Forums and stakeholder "reality check" sessions				⊙
<b>5. REPORT-PREPARATION AND ROLL-OUT</b>				
Preparation of custom Strategic Plan report for Leadership and Planning Teams				⊙
Facilitation of strategic plan roll-out to selected audiences (# groups)				⊙
Customized transition-to-implementation framework				⊙
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24/7 access to Eye on the Goal™ online tools and resources (# of login ID's)				⊙20
Total number of on-site visitation-days (for facilitation, consultation, etc.)				7-10
Total number of hours of "virtual" interactions (e.g., conference calls)				~45

\*Focus with selected students; customized survey for all students in Grades 3-12.

\*Customized survey with other stakeholders (e.g., teachers, staff, admin, community optional; additional professional fees apply).

# Strategic Planning Calendar (v072417)

Day	Date	Time	Team/Focus	Est'd # of Participants
--	Aug 2017	TBD	<b>C&amp;I / Educational Services</b>	Assessment of current state of standards-aligned instruction and educational programs
--	Sep, 2017	TBD	<b>Student Voice</b>	Customized survey of ALL students in Grades 3-12; administered at school
Thu	Oct 12, 2017	AM, and PM	<b>Student Voice</b>	Conversations with diverse cross-section of students; one group per level – elementary, middle, high school; approx. 75-120-minute sessions.
Fri	Oct 13, 2017	AM	<b>Student Voice</b>	R Conversations with diverse cross-section of students; one group per level – elementary, middle, high school; approx. 75-120-minute sessions.
Wed	Oct 18, 2017	8:00AM – 3:30PM	<b>Core Planning Team - #1</b>	Representatives of all community stakeholder groups
Thu	Oct 19, 2017	7:00AM– 7:45AM	<b>Alignment Team - #1</b>	Community leaders and opinion-shapers (from multiple sectors)
Thu	Oct 19, 2017	8:00AM – 3:30PM	<b>Core Planning Team - #2</b>	Representatives of all community stakeholder groups
Wed	Nov 8, 2017	8:00AM – 3:30PM	<b>Core Planning Team - #3</b>	Representatives of all community stakeholder groups
Wed	Nov 8, 2017	3:30PM – 4:00PM	<b>Leadership Team - #1</b>	District-wide leadership team (school-level and district/central office level)
Thu	Nov 9, 2017	7:00AM– 7:45AM	<b>Alignment Team - #2</b>	Community leaders and opinion-shapers (from multiple sectors)
Thu	Nov 9, 2017	8:00AM – 3:30PM	<b>Core Planning Team - #4</b>	Representatives of all community stakeholder groups
Wed	Nov 29, 2017	8:00AM – 3:30PM	<b>Instructional Focus Team</b>	Principals, Teachers, C&I/Educational Services, Instructional Coaches & Specialists, etc.
Wed	Nov 29, 2017	6:00PM– 8:00	<b>Community Forum</b>	"Reality check" session with community stakeholders; open to all.
Thu	Nov 30, 2017	7:00AM– 7:45AM	<b>Alignment Team - #3</b>	Community leaders and opinion-shapers (from multiple sectors)
Thu	Nov 30, 2017	8:00AM – 3:30PM	<b>Instructional Focus Team</b>	Principals, Teachers, C&I/Educational Services, Instructional Coaches & Specialists, etc.
Thu	Nov 30, 2017	6:00PM– 8:00PM	<b>Community Forum</b>	"Reality check" session with community stakeholders; open to all.
Wed	Dec 13, 2017	8:00AM – 2:30PM	<b>Core Planning Team - #5</b>	Representatives of all community stakeholder groups. [Note: 2:30pm adjournment]
Wed	Dec 13, 2017	2:45PM – 4:00PM	<b>Leadership Team - #2</b>	District-wide leadership team (school-level and district/central office level)
Wed	Jan 10, 2018 tentative	2:45PM – 4:00PM	<b>Leadership Team - #3</b>	District-wide leadership team (school-level and district/central office level)
TBD	Nov-Dec 2017 (flexible)	TBD	<b>Each School, Each Department</b>	"Reality check" of draft strategic plan by staff of each school & each Department; facilitated by planning team members

TBD	Jan. 2018	TBD	<b>Core Planning &amp; Instructional Focus Teams</b>	<ul style="list-style-type: none"> <li>Review of draft strategic plan; recognizing Core Planning Team and Instructional Focus Team for their service</li> </ul>	100+
TBD	Jan, 2018	TBD	<b>Board Approval</b>	<ul style="list-style-type: none"> <li>Formal Board presentation</li> </ul>	?
Wed	Feb 14, 2018 <b>tentative</b>	2:45PM – 4:00PM	<b>Leadership Team - #4</b>	<ul style="list-style-type: none"> <li>District-wide leadership team (school-level and district/central office level)</li> </ul>	60+

## Professional Fees

Strategic Planning (Level 3 services)	\$96,370.00
Customized <b>Student</b> Survey (Grades 3-12)	\$7,250.00
Less Discount	(\$4,520.00)
<b>Total Professional Fees</b>	<b>\$99,100</b>