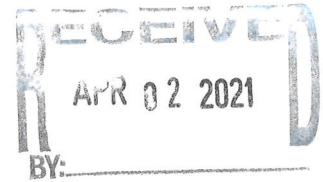




Performance Fact, Inc.
333 HEGENBERGER RD
SUITE 204
OAKLAND, CA 94621
(510)568-7944
contact@performancefact.com
www.performancefact.com



INVOICE

BILL TO

Sumner-Bonney Lake
1202 Wood Avenue
Sumner, WA 98390

INVOICE # 1468

DATE 03/15/2021

DUE DATE 04/14/2021

TERMS Net 30

DESCRIPTION	QTY	RATE	AMOUNT
Services - Strategic Planning	1	24,700.00	24,700.00

Invoice 1 of 4

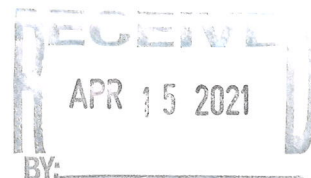
BALANCE DUE

\$24,700.00

4/2/21 OK to pay
HPP *[Signature]*
PO# 1012021003



Performance Fact, Inc.
333 HEGENBERGER RD
SUITE 204
OAKLAND, CA 94621
(510)568-7944
contact@performancefact.com
www.performancefact.com



INVOICE

BILL TO

Sumner-Bonney Lake
1202 Wood Avenue
Sumner, WA 98390

INVOICE # 1474

DATE 04/01/2021

DUE DATE 05/01/2021

TERMS Net 30

DESCRIPTION	QTY	RATE	AMOUNT
Services - Strategic Planning	1	24,700.00	24,700.00

Invoice 2 of 4

BALANCE DUE

\$24,700.00

4/15/21
OK to pay
Hyp Cal
PO # 1012021003



Performance Fact, Inc.
333 HEGENBERGER RD
SUITE 204
OAKLAND, CA 94621
(510)568-7944
contact@performancefact.com
www.performancefact.com

Reminder: Payment Address:
Mutlu Fagbayi
4022 Balfour Avenue
Oakland, CA 94610

INVOICE

BILL TO

Sumner-Bonney Lake
1202 Wood Avenue
Sumner, WA 98390

INVOICE # 1477

DATE 05/03/2021

DUE DATE 06/02/2021

TERMS Net 30

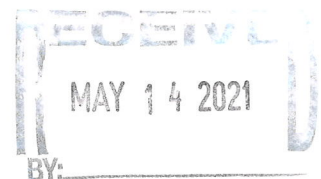
DESCRIPTION	QTY	RATE	AMOUNT
Services - Strategic Planning	1	24,700.00	24,700.00

Invoice 3 of 4

BALANCE DUE

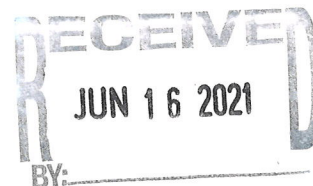
\$24,700.00

5/12/21
OK to pay Hgt LC
PO # 1012021003





Performance Fact, Inc.
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SUITE 204
OAKLAND, CA 94621
(510)568-7944
contact@performancefact.com
www.performancefact.com



INVOICE

BILL TO

Sumner-Bonney Lake
1202 Wood Avenue
Sumner, WA 98390

INVOICE # 1483

DATE 06/10/2021

DUE DATE 07/10/2021

TERMS Net 30

DESCRIPTION	QTY	RATE	AMOUNT
Services - Strategic Planning	1	24,700.00	24,700.00

Invoice 4 of 4

BALANCE DUE

\$24,700.00

6/16/21
OK to pay Hq Col
PO # 1012021003

Contract Review Form

APPROVED

SBLSD Contract Ref #:

00242

3/16/21 clm

Requestor: Hope Craker / Dr. L. Dent

Vendor: Performance Fact Inc

Type: ☒ General ☐ Inter-local Agreement ☐ MOA

Amount: \$ 98,800⁰⁰, if applicable

School Year: 20/21 Start Date: 1/2021 End Date: 6/2021

Certificate of Insurance: ☐ Yes ☒ No

Comments: _____

	<u>Date Received</u>	<u>Reviewed</u>	<u>Date Returned</u>	<u>Approve</u>	<u>Deny</u>	
Cheryl:	<u>3/16/21</u>	<input checked="" type="checkbox"/>	<u>3/16/21</u>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Matt:	_____	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	Route to Bang: <u>Y</u> N
Bang:	<u>3/16/21</u>	<input checked="" type="checkbox"/>	<u>3/16/21</u>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Route to Marion: <u>Y</u> <u>N</u>
Marion:	_____	<input type="checkbox"/>	_____	Review deadline	_____	

Board Approval: NA ☒ or Board Meeting Date: _____

per Bang
need:

Comments

Cheryl: - Exhibit A, sole source or?

Matt:

Bang:



Log In

Login.gov FAQs



ALERT: SAM.gov will be down for scheduled maintenance Saturday, 03/20/2021 from 8:00 AM to 8:00 PM.

Current Search Terms: Performance fact, Inc*

Total records:0

Result Page:

Sort by **Relevance** ▼ Order by **Descending** ▼

Your search for Performance fact, Inc* returned the following results...

Save PDF

Export Results

Print

No records found.

Result Page:

Save PDF

Export Results

Print



Search Results	Disclaimers	EAPN.kg.n
Data access	Accessibility	GNA.gov.LAL
Child Status	Privacy Policy	GSA.gov
About		USA.gov
Help		



Agreement between
SUMNER-BONNEY LAKE SCHOOL DISTRICT (Sumner, WA)
and **PERFORMANCE FACT, Inc.**
regarding **Community-wide Strategic Planning Process**

BACKGROUND

This Agreement outlines the scope of professional services that Performance Fact, Inc. will provide to **SUMNER-BONNEY LAKE SCHOOL DISTRICT** (SBLSD or “Client”). It has been prepared in order to align Performance Fact and **SBLSD** on common purpose and to ensure outcomes that are good and just for all parties.

1. PARTIES

This Agreement is made in January 2021, between **SBLSD** and Performance Fact, Inc. The project manager for **SBLSD** is Dr. Laurie Dent, Superintendent of Schools. The project manager for Performance Fact, Inc. is Mutiu Fagbayi, President/CEO. This Agreement covers the period from January 2021 to June 2021. It is generally understood that additional individuals designated by the **SBLSD** and Performance Fact project managers may play significant roles during certain phases of this project.

2. SCOPE OF WORK

(See Exhibit A, attached)

3. PAYMENT/EXPENSES

The Client will pay Performance Fact a total of **\$98,800** for professional services according to the estimates and scope of work outlined in *Exhibit A*.

The amount will cover fees for professional services and expenses, facilitation of all sessions, compilation of presentation materials, and ongoing communication with the Superintendent and the Board (including Board review sessions related to the strategic planning exercise).

4. RESCHEDULING/CANCELLATION POLICY

Rescheduling/Cancellations of Specific Events/Activities per Contract:

- More than 30 days prior to scheduled date: No additional charge
- Less than 30 days before scheduled date: \$500 additional fee payable by Client.

5. LOGISTICS

The Client or its designee(s) will oversee all logistics related to meetings, workshops and other gatherings associated with this project, including participants’ access to zoom (or equivalent) web conferencing, when applicable.

6. PAYMENT SCHEDULE

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

March 1, 2021	\$24,700
April 1, 2021	\$24,700
May 1, 2021	\$24,700
June 1, 2021	\$24,700

7. DISPUTE RESOLUTION

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.

8. EQUAL EMPLOYMENT OPPORTUNITY

Performance Fact does not discriminate against any employee or applicant for employment because of race, creed, color, sex, national origin, age, disability, or marital status.

9. OWNERSHIP OF MATERIALS

Performance Fact will be using propriety material during portions of the Contract. Such material shall remain the exclusive property of Performance Fact, and shall not be further disseminated without the express written consent of Performance Fact. In the event written permission is granted, acknowledgement of source for all Performance Fact proprietary materials, tools, processes, etc. is required.

CONTRACT TERMS ACCEPTED:

PERFORMANCE FACT SIGNATORY

MUTIU O. FAGBAYI

Name



Signature

President/CEO

Title

SUMNER-BONNEY LAKE SD SIGNATORY

Name (Please Print)

Signature

Title

January 3, 2021

Date



Moving Forward as One!™

Community-wide Strategic Planning Process

Introduction

A primary purpose of planning is to facilitate unity of purpose, or *alignment* (Figure 1). Alignment is the process of reaching mutual understanding about common goals. It gives shared meaning to the work of the school or school district, thereby enabling successful accomplishment of the goals of the organization.

To be effective, the alignment process must proactively seek out and embrace the diverse voices of the organization's diverse stakeholders (Figure 2). 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.

Figure 1

Why Plan?

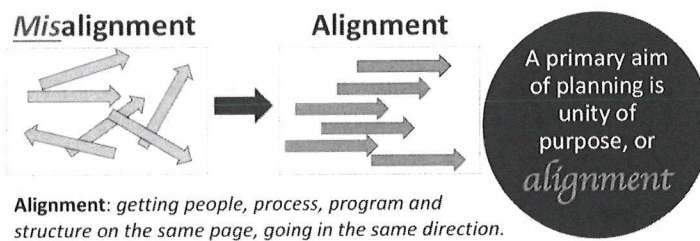
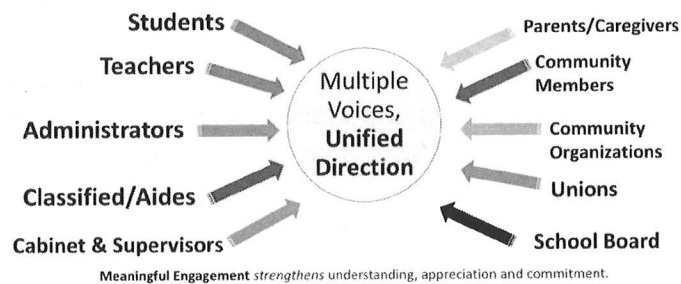


Figure 2

Embracing Diverse Voices & Perspectives



Strategic Planning in the Era of COVID-19

"In time, the virus will fade, and this sci-fi moment we're living in today will be behind us. But the memory of the choices we made and how we showed up as a leader while it was here, won't."

Trever Cartwright in Forbes Magazine (April 2020)

The era of the COVID-19 pandemic presents several challenges to our historical strategic process. The pandemic also offers a number of opportunities; adaptations and extensions that were less likely prior to the pandemic.

For example, a planning process conducted primarily in a virtual (online) environment loses some of the "three-dimensional" connectedness and intimacy that face-to-face interactions offer, even with Zoom breakout rooms. On the other hand, a predominantly virtual setting can accommodate many more participants, more diverse voices, and greater flexibility in scheduling.

At Performance Fact, we are making sensible adjustments to the design and delivery of our planning process, to ensure safe, authentic, meaningful experiences for the participants, and actionable strategic recommendations that fit the district's context.

Figure 3 illustrates the phases of the strategic planning process that would ensure alignment and engagement of a broad cross-section of all stakeholders.

Figure 3

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]
6	• "Have we aligned resources with the Plan?"	[Allocation of people, time, \$]
7	• "Do we have the support of our leaders and policymakers?"	[Formal approval]

The principles and processes implied in Figures 1-3 will guide the development of this community-wide strategic planning process, adapted to the "new normal" introduced by the COVID-19 pandemic.

Proposed Strategic Planning Process

{tentative start date: January/February 2021; end date: April/May 2021}

Phases	Purpose, Process, Participants
Phase 1: Is everyone <u>ready</u> to go? [January 2021]	<i>Mobilization of the community</i> <ul style="list-style-type: none"> Finalize project scope and calendar with Superintendent/Board Define planning teams, participants, and communication plan Conduct orientation and listening sessions with selected stakeholders
Phase 2: Where are we <u>now</u>? [February 2021]	<i>Assessment of the current state</i> <ul style="list-style-type: none"> Conduct focus groups or surveys to capture student voice and stakeholder voice Analyze student data using the 4-Lens™ data analysis protocol Conduct root-cause analysis of current state of student learning and professional practices
Phase 3: Where are we going next? [February – March 2021]	<i>Purpose, student outcomes, and benchmarks</i> <ul style="list-style-type: none"> Reaffirm purpose: vision, mission, core values, equity statements Clarify outcomes for students: goals and measures of success Set performance benchmarks: achievement targets
Phase 4: Is everyone still with us? [March 2021]	<i>Reality check</i> <ul style="list-style-type: none"> Conduct reality check with students Conduct reality check with family/community stakeholders Conduct reality check with school-level and district-level staff
Phase 5: How are we going to get there? [March – April 2021]	<i>Building blocks, practices, strategies</i> <ul style="list-style-type: none"> Articulate the Four Pillars (building blocks), or theory of action Define Professional Practices for Instructional Effectiveness Define Educational Strategies and Key Actions
Phase 6: Have we aligned resources to the plan? [April - May 2021]	<i>Allocation of resources</i> <ul style="list-style-type: none"> Identify major resource implications (people, time, money) Define guidelines for acquiring and allocating resources Realign organizational structure, as appropriate
Phase 7: Do we have a clear pathway for follow-through? [April - May 2021]	<i>Roadmap for Disciplined implementation</i> <ul style="list-style-type: none"> Secure formal approval of the plan (by the board) Develop Roadmap for disciplined implementation Define Year 1 priorities and develop implementation plan

Project Scope-&-Sequence and Calendar

{tentative dates; pending confirmation with the Superintendent}

{All sessions to be conducted through remote /virtual participation, via zoom}

{Each session 3 hours in length, except *when indicated otherwise*}

	DATE	START/END TIME	FOCUS	PARTICIPANTS
1	January		<i>Student Voice</i> (Focus Group Discussion with representative sample of students)	<ul style="list-style-type: none"> One Elementary group; Secondary; each 45-60 minutes duration; 15-25 students per group
2	February		<i>Vision/Mission/Core Values; Equity Commitment; (optional: Portrait of a Graduate)</i>	<ul style="list-style-type: none"> Board Superintendent & Cabinet
3	February		<i>Vision/Mission/Core Values; Equity Commitment; (optional: Portrait of a Graduate)</i>	<ul style="list-style-type: none"> Board Superintendent & Cabinet
4	February		<i>Vision/Mission/Core Values; Equity Commitment; (optional: Portrait of a Graduate)</i>	<ul style="list-style-type: none"> Board Superintendent & Cabinet
5	February		<i>Vision/Mission/Core Values; Equity Commitment; (optional: Portrait of a Graduate)</i>	<ul style="list-style-type: none"> Board Superintendent & Cabinet
6	March		<i>Goals & Measures of Student Success, Equity Indicators</i>	<ul style="list-style-type: none"> Representative sample of <u>all</u> stakeholders (including students) 60+ people
7	March		<i>Goals & Measures of Student Success, Equity Indicators</i>	<ul style="list-style-type: none"> Representative sample of <u>all</u> stakeholders (including students) 60+ people
8	March		<i>Theory of Action; Four Pillars; Professional Practices; Educational Strategies</i>	<ul style="list-style-type: none"> Representative sample of Practitioners: Cabinet, Building Admin, Teachers, Support Staff, Coaches, District-level personnel 30+ people
9	April		<i>Theory of Action; Four Pillars; Professional Practices; Educational Strategies</i>	<ul style="list-style-type: none"> Representative sample of Practitioners: Cabinet, Building Admin, Teachers, Support Staff, Coaches, District-level personnel 30+ people
10	April		<i>Theory of Action; Four Pillars; Professional Practices; Educational Strategies</i>	<ul style="list-style-type: none"> Representative sample of Practitioners: Cabinet, Building Admin, Teachers, Support Staff, Coaches, District-level personnel 30+ people
11	April		Board/Cabinet Status Review	<ul style="list-style-type: none"> Board & Cabinet
12	May		<i>School-level/Department-level "reality check"</i>	<ul style="list-style-type: none"> Cabinet
13	May		<i>Strategic Plan Compilation</i>	<ul style="list-style-type: none"> Performance Fact Team Superintendent/Cabinet
14	May/June		<i>Board Review/Adoption</i>	<ul style="list-style-type: none"> Board & Cabinet