

**District: 004****Vendor Activity****QSS/OASIS**

Page 1 of 1

Vendor Number: 017522 - PERFORMANCE FACT INC

Beginning Date

Ending Date

07/01/2020

06/30/2025

Transaction Types

Reference Number:000000

PO Acct Line:0

Invoice Number:

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Transaction Type	Encumbered Balance	Pending Payment	Payment
Canceled Warrants			0.00
Credit Memo		0.00	0.00
Est Payables/Payments	0.00	0.00	0.00
Hand Warrants			0.00
Liability Payments		0.00	0.00
Purchase Orders/Payments	0.00	0.00	398,680.00
Pay Vouchers		0.00	15,500.00
Travel Claims		0.00	0.00
Revolving cash		0.00	0.00
Req enc	0.00		
Vendor Total	0.00	0.00	414,180.00
1 vendor(s) and 17 detail record(s) selected.			

Entered	Reference	Paid	Warrant	Enc	Amount	FD	BDR	SCH	RESC	Y	GOAL	FUNC	OBJT	TYPE	Invoice No
06/14/2021	PV-001003	06/16/2021	03298426 R		15,500.00		01-100-000-0000-0-0000-7150-5800-0000								1480
11/05/2021	PO-500866	11/05/2021		179,600.00	0.00		01-100-000-0000-0-0000-7150-5800-0000								
12/09/2021	PO-500866	12/13/2021	03309832 R	-35,920.00	35,920.00		01-100-000-0000-0-0000-7150-5800-0000								1509
02/15/2022	PO-500866	02/23/2022	03313996 R	-35,920.00	35,920.00		01-100-000-0000-0-0000-7150-5800-0000								1529
03/09/2022	PO-500866	03/14/2022	03315562 R	-35,920.00	35,920.00		01-100-000-0000-0-0000-7150-5800-0000								1540
04/13/2022	PO-500866	04/18/2022	03317952 R	-35,920.00	35,920.00		01-100-000-0000-0-0000-7150-5800-0000								1547
06/30/2022	PO-500866	06/30/2022		-35,920.00	0.00		01-100-000-0000-0-0000-7150-5800-0000								Roll to 2022/23
07/01/2022	PO-500866	07/01/2022		35,920.00	0.00		01-100-000-0726-0-0000-7150-5800-0000								
10/28/2022	PO-600921	10/28/2022		255,000.00	0.00		01-100-000-0000-0-0000-7150-5800-0000								
10/28/2022	PO-600921	11/02/2022	03331471 R	-105,000.00	105,000.00		01-100-000-0000-0-0000-7150-5800-0000								1584
10/28/2022	PO-600921	10/28/2022		112,500.00	0.00		01-100-000-0726-0-0000-7150-5800-0000								
01/04/2023	PO-600921	01/09/2023	03335504 R	-37,500.00	37,500.00		01-100-000-0000-0-0000-7150-5800-0000								1590
02/07/2023	PO-600921	02/15/2023		-112,500.00	0.00		01-100-000-0000-0-0000-7150-5800-0000								use line 2
02/16/2023	PO-600921	02/21/2023	03338507 R	-37,500.00	37,500.00		01-100-000-0726-0-0000-7150-5800-0000								1605
03/22/2023	PO-600921	03/27/2023	03341228 R	-37,500.00	37,500.00		01-100-000-0726-0-0000-7150-5800-0000								1612
04/27/2023	PO-600921	05/01/2023	03344127 R	-37,500.00	37,500.00		01-100-000-0726-0-0000-7150-5800-0000								1620
06/30/2023	PO-500866	06/30/2023		-35,920.00	0.00		01-100-000-0726-0-0000-7150-5800-0000								Roll to 2023/24

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Page 1 of 1

**District: 004****Vendor Activity****QSS/OASIS**

Page 1 of 1

Vendor Number: 017713 - PERFORMANCE FACT INC

Beginning Date

Ending Date

07/01/2020

06/30/2025

Transaction Types

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Reference Number:000000

PO Acct Line:0

Invoice Number:

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Transaction Type	Encumbered Balance	Pending Payment	Payment
Canceled Warrants			0.00
Credit Memo		0.00	0.00
Est Payables/Payments	0.00	0.00	0.00
Hand Warrants			0.00
Liability Payments		0.00	0.00
Purchase Orders/Payments	0.00	0.00	0.00
Pay Vouchers		0.00	35,920.00
Travel Claims		0.00	0.00
Revolving cash		0.00	0.00
Req enc	0.00		
Vendor Total	0.00	0.00	35,920.00

1 vendor(s) and 1 detail record(s) selected.

Entered	Reference	Paid	Warrant	Enc	Amount	FD	BDR	SCH	RESC	Y	GOAL	FUNC	OBJT	TYPE	Invoice No
11/02/2021	PV-000471	11/08/2021	03307703 R		35,920.00	01	100	000	0000	0	0000	7150	5800	0000	1494

Template: vendet (L.00.06)

Generated: 02/25/2025 at 10:15:06 AM

Page 1 of 1



**Agreement between  
WASHINGTON UNIFIED SCHOOL DISTRICT  
and PERFORMANCE FACT, Inc.  
regarding Strategic Plan Disciplined Implementation & Leadership for Results**

**BACKGROUND**

This Agreement outlines the scope of professional services that Performance Fact, Inc. will provide to **WASHINGTON UNIFIED SCHOOL DISTRICT** ("Client"). It has been prepared in order to align Performance Fact and the Client on common purpose and to ensure outcomes that are fair and just for all parties.

**1. PARTIES**

This Agreement is made in July 2022 between the Client and Performance Fact, Inc. The project manager for the Client is Dr. Cheryl Hildreth, Superintendent of Schools. The project manager for Performance Fact, Inc. is Mutiu Fagbayi, President/CEO. It is generally understood that additional individuals designated by the Client and Performance Fact project managers may play significant roles during certain phases of this project.

**2. SCOPE OF WORK**

The Scope covers three school-years: 2022-2023, 2023-2024, and 2024-2025. See Exhibit A (attached) for detailed outline of professional services.

**3. PAYMENT/EXPENSES**

The Client will pay Performance Fact a total of **\$255,00** for professional services completed during the **2022-2023 school year**, based on the scope of work outlined in *Exhibit A*.

Professional fees for 2023-2024 and 2024-2025 school years are estimated to be \$240,000 per school year (see Table 1, Exhibit A). Actual fees for each of those two year will be agreed by the client and Performance Fact before the start of each school year.

**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.

September 15, 2022	\$127,500 (50%)
November 15, 2022	\$42,500 (16.7%)
January 15, 2023	\$42,500 (16.7%)
March 15, 2023	\$42,500 (16.7%)

## 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*

July 20, 2022

### WASHINGTON USD SIGNATORY

*Name (Please Print)*

*Signature*

*Title*

*Date*

Scope of Professional Services  
**2022-2025 SY**  
**Washington Unified School District**  
*West Sacramento, CA*

Dr. Cheryl Hildreth, *Superintendent*

**GETTING IT DONE:  
DISCIPLINED IMPLEMENTATION  
&  
LEADERSHIP FOR RESULTS**

*Proposed by:*  
**Performance Fact, Inc.**  
Mutiu O. Fagbayi, President/CEO

July 2022

## BACKGROUND

During the 2021-2022 school year, Performance Fact facilitated a community-wide engagement process to develop the [five-year Strategic Plan](#) for Washington Unified School District (“WUSD”). Hundreds of stakeholders – including students, parents and caregivers, teachers, staff, administrators, district leadership, and community members and partner-organizations – participated in the months-long alignment exercise. The Superintendent of Schools, Dr. Cheryl Hildreth, championed the planning process.

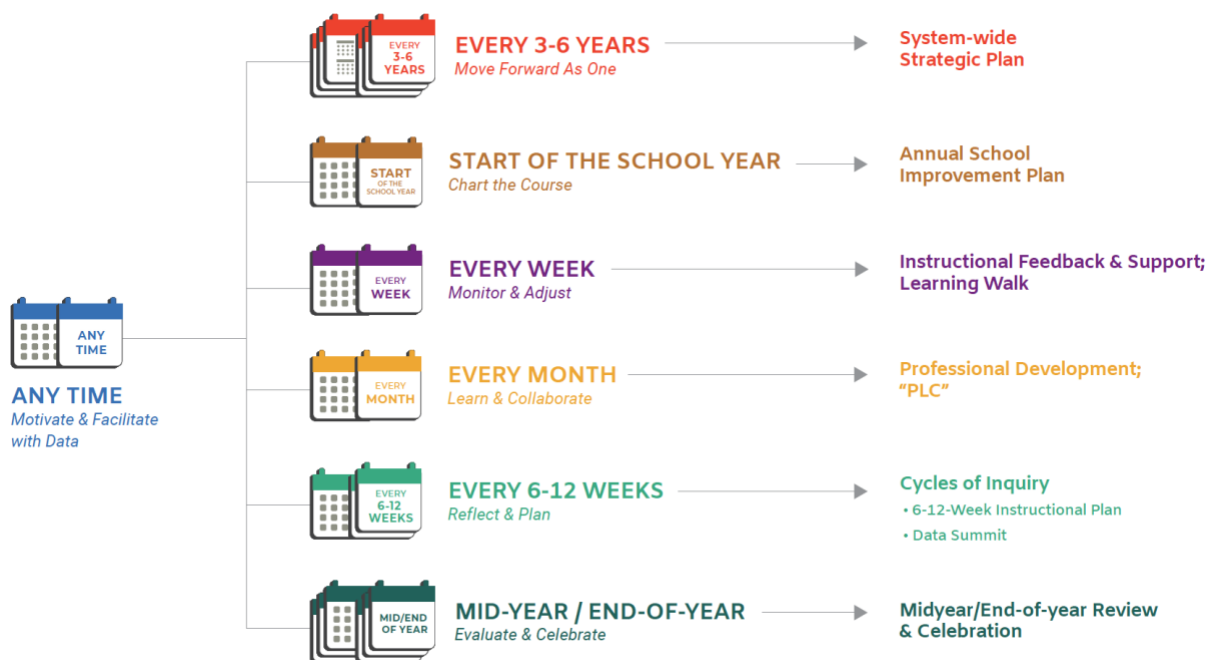
A results-focused plan is the first step towards realizing desired outcomes for student learning and achievement. However, without disciplined implementation, a plan flounders and may not live up to its promise. Therefore, after you “plan the work,” then, you must “work the plan” to realize the promise and expectations of the long-range plan.

This Proposal outlines the professional services that Performance Fact, Inc. will provide to support the execution of the district’s Strategic Plan. At Performance Fact, our approach is to align our external perspective with our client’s internal vision for their students, staffs, schools, and community. In particular, we aim to strengthen the organization’s capacity to achieve stronger results through [disciplined implementation](#), promotion of [equity-centered practices](#), and development of [sustainable leadership capacity](#).

Turning good intentions into stronger results for students demands consistent focus at every level: every classroom, every school, every department, at home and in the community. The primary responsibility for making sure that everything comes together to produce sustainable results rests primarily with leadership at the Board, Cabinet, district, and school levels. Performance Fact is committed to assisting WUSD strengthen its capacity-to-deliver by providing tools, technical assistance, and targeted professional learning essential for producing desired results.

## IMPLEMENTATION DESIGN

The [Roadmap for Disciplined Implementation](#) is a step-by-step process for implementing action plans. By dividing the work into discrete, calendar-driven chunks, leaders and practitioners can significantly reduce the “implementation gap” often associated with improvement plans.



The next section of this Proposal delineates specific processes and deliverables for each time interval, as identified collaboratively with the Superintendent. We also include the primary audiences/participants for each process or deliverable for this school year; those designations can be modified by mutual consent of the parties.

## SCOPE, SEQUENCE & DELIVERABLES

START OF THE SCHOOL YEAR	Chart the Course
School-level Annual Action Plan	<p>(Re)align the annual continuous improvement planning process (e.g., SPSA) to the district’s long-term plan, and to applicable State guidelines. Outline student achievement targets, practices and strategies, and professional development and collaboration themes for the year.</p> <ul style="list-style-type: none"> <li>• <i>Superintendent   Ed Services   Principals &amp; Administrators</i></li> <li>• <i>Optional: School Leadership Teams   State &amp; Federal Program Managers</i></li> </ul>
Department-level Annual Priorities	<p>Define annual district-level priorities and milestones, aligned to the data-informed needs identified in the school-level improvement plans. Be explicit about the supports and services that the district-level Educational Services team will provide to facilitate school and system-wide implementation. Furthermore, clarify how other district-level departments (e.g., HR, Technology, Business Services ) will provide critical supports for school-level implementation.</p> <ul style="list-style-type: none"> <li>• <i>Superintendent   Cabinet</i></li> <li>• <i>Optional: District-level Managers &amp; Coordinators   Principals</i></li> </ul>
Roadmap Calendar	<p>Create a consolidated Roadmap Calendar of U key activities and events to ensure alignment of people and time, and to provide an efficient mechanism for conscious (intentional) use of time throughout the school year. The Roadmap Calendar serves as the “master” implementation calendar, established at the start of the school year, and updated as conditions warrant.</p> <ul style="list-style-type: none"> <li>• <i>Superintendent   Cabinet   Principals</i></li> <li>• <i>Optional: District-level Managers &amp; Coordinators</i></li> </ul>
Data, Assessment & Performance Management System	<p>Develop (or update) the district’s data management system (including formative assessments processes; data gathering, analysis, and dissemination) to ensure availability of timely, accurate, relevant data about student learning, professional practices and strategies, and operational performance in general.</p> <ul style="list-style-type: none"> <li>• <i>Superintendent   Cabinet   Principals   Research &amp; Evaluation Team   Technology Department   Teacher-leaders</i></li> <li>• <i>(Optional) District’s SIS and Information Management providers</i></li> </ul>



Vital Signs Scorecard™ (Design & Baseline)	<p>Design the Vital Signs Scorecard™, or dashboard of key indicators of progress regarding student learning, teaching practices, leadership practices, and organizational practices, as outlined in the strategic plan. The Vital Signs Scorecard offers timely, evidence-based feedback about adult practices (i.e., cause) and student progress (i.e., effect).</p> <p>Compile the baseline data for the vital signs (as appropriate) and set performance targets for the year(s).</p> <ul style="list-style-type: none"> <li>• <a href="#">Superintendent   Ed Services   Principals &amp; Administrators   District-level Managers &amp; Coordinators</a></li> <li>• <a href="#">Optional: School Leadership Teams   State &amp; Federal Program Managers</a></li> </ul>
CPR Card™ (Design & Baseline)	<p>Create the CPR Card (<u>C</u>ontinuous <u>P</u>rogress <u>R</u>eport <b>C</b>ard) to compile the milestones of progress (key tasks) across school-level improvement plans and district-level priorities for the year. Use the CPR Card to monitor the timeliness and quality of implementation of the day-to-day activities as well as long-term projects and priorities.</p> <ul style="list-style-type: none"> <li>• <a href="#">Superintendent   Ed Services   Principals &amp; Administrators   District-level Managers &amp; Coordinators</a></li> <li>• <a href="#">Optional: School Leadership Teams   State &amp; Federal Program Managers</a></li> </ul>

EVERY MONTH	Learn & Collaborate
Monthly Team Priorities	<p>Define explicit priorities and milestones for each month; monitor continuously, and communicate progress to all stakeholders.</p> <ul style="list-style-type: none"> <li>• <a href="#">Superintendent   Ed Services   Cabinet</a></li> <li>• <a href="#">Optional: Principals &amp; Administrative Team</a></li> </ul>
Cabinet Capacity-building (Coaching for High Performance)  (every 4-6 weeks)	<p>Facilitate capacity-building for the Superintendent's Cabinet, including:</p> <ul style="list-style-type: none"> <li>• Ongoing monitoring of progress regarding Annual Priorities;</li> <li>• Strengthening collaboration and collegial accountability across Department lines;</li> <li>• Providing individualized coaching and support for Cabinet members, as needed;</li> <li>• Assisting Cabinet members with development of their respective key indicators;</li> </ul>

	<ul style="list-style-type: none"> <li>Ensuring consistent cross-department alignment with the priorities in the Strategic Plan.</li> <li><i>Superintendent   Ed Services   Cabinet</i></li> </ul>
Alignment & Coherence: Professional Service Providers  (every 4-6 weeks)	<p>Facilitate alignment and coherence among key professional service providers, as identified by the Superintendent, including:</p> <ul style="list-style-type: none"> <li>Clarifying relative roles and responsibilities of each providing;</li> <li>Coordinating periodic check-ins of the service providers, when convened by the Superintendent;</li> <li>Producing summaries of progress across service providers.</li> <li><i>Superintendent &amp; Cabinet   NCUST   Nicole Anderson &amp; Associates</i></li> <li><i>Optional: YCOE   Other providers and partners identified by the Superintendent</i></li> </ul>

EVERY 6-12-WEEKS		Reflect & Plan
Data Summit™	<p>At the end of each 6-12-week cycle, compile data about student learning and professional practices, based on the priorities identified in the instructional plan for the cycle. Use the Data Summit protocol to:</p> <ul style="list-style-type: none"> <li>Analyze student learning</li> <li>Examine professional practices and strategies</li> <li>Draw conclusions and plan for the next cycle</li> </ul> <p>Data sources for the Data Summit include instructional monitoring logs, formative/benchmark assessments, CPR Card and Vital Signs Scorecard.</p> <ul style="list-style-type: none"> <li><i>Superintendent   Ed Services   Principals &amp; Administrators</i></li> <li><i>Optional: School Leadership Teams   District-level Managers &amp; Coordinators</i></li> </ul>	
Superintendent's School Progress Review	<p>Conduct quarterly (or trimester) evidence-based school progress reviews based on protocols established by the Superintendent and focused on each school's annual continuous improvement plan.</p> <ul style="list-style-type: none"> <li><i>Superintendent   Ed Services   Principals &amp; Administrators</i></li> <li><i>Optional: School Leadership Teams   District-level Managers &amp; Coordinators</i></li> </ul>	

MID-YEAR &	Evaluate & Celebrate
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END-OF-YEAR	
Progress Report to the Community	<p>Evaluate progress and celebrate student, team and school progress at the mid-point of the school year, relative to the priorities in the annual school-level and district-level continuous improvement plans. Share a progress report with all stakeholders (including community groups) regarding the priorities in the annual improvement plans. Repeat at end-of-year, with identification of priorities to be considered in the annual improvement plan for the next school year.</p> <ul style="list-style-type: none"> <li>• <a href="#">Superintendent   Ed Services</a></li> <li>• <a href="#">Optional: Principals &amp; Administrators</a></li> </ul>

ANYTIME	Motivate & Facilitate with Data
Leading with Data	<p>Utilize a set of data tools to facilitate progress monitoring and data-informed decision-making regarding student learning and professional practices and strategies. Core data tools include:</p> <ul style="list-style-type: none"> <li>• <a href="#">4-Lens Data Analysis Protocol</a> to probe a variety of student data (including data from benchmark assessments, state tests, survey data, attendance and disciplinary referrals) across four perspectives: Growth – Consistency – Equity – Standards</li> <li>• <a href="#">Vital Signs Scorecard™</a> to monitor key metrics of student learning, teaching practices, leadership practices, and organizational practices outlined in the strategic plan (or continuous improvement plan)</li> <li>• <a href="#">CPR Card™</a> to track progress regarding implementation of milestones of progress</li> <li>• <a href="#">Instructional Tracker</a> to track the quality and effectiveness of day-to-day instruction using instructional monitoring tools framed around the professional practices and educational strategies in the district's strategic plan. Use data from the observations to inform feedback, coaching, and support for teachers and staff.</li> <li>• <a href="#">Voice Surveys</a> to provide feedback from students, educators, and external stakeholders regarding their perception of and engagement with the school system</li> </ul> <ul style="list-style-type: none"> <li>• <a href="#">Superintendent   Ed Services   Cabinet   Principals &amp; Administrators</a></li> <li>• <a href="#">Optional: School Leadership Teams   District-level Managers &amp; Coordinators</a></li> </ul>

**Table 1: Fees for Professional Services**  
**3-YEAR DISCIPLINED IMPLEMENTATION**  
**& LEADERSHIP FOR RESULTS**

Year 1 2022-2023 SY	<p>Strengthening the Foundation, Investing in People &amp; Processes</p> <p>Total Professional Fees for SY22/23 = \$255,000</p>
Year 2 2023-2024 SY	<p>Going to Scale<sup>*</sup></p> <p><i>Estimated</i> Professional Fees for SY23/24 = \$240,000</p>
Year 3 2024-2025 SY	<p>Ensuring Sustainability<sup>*</sup></p> <p><i>Estimated</i> Professional Fees for SY24/25 = \$240,000</p>

<sup>\*</sup> Detailed scope of professional services to be developed collaboratively by client and Performance Fact



PERFORMANCE *fact*, INC.

*Developing leaders. Transforming Practices. Inspiring Results.*

**Agreement between**  
**WASHINGTON UNIFIED SCHOOL DISTRICT** (West Sacramento, CA)  
**and PERFORMANCE FACT, Inc.**  
*regarding Strategic Planning, Implementation, & Leadership for Results*

**BACKGROUND**

This Agreement outlines the scope of professional services that Performance Fact, Inc. will provide to **WASHINGTON UNIFIED SCHOOL DISTRICT** ("Client"). It has been prepared in order to align Performance Fact and the Client on common purpose and to ensure outcomes that are fair and just for all parties.

**1. PARTIES**

This Agreement is made in August 2021 between the Client and Performance Fact, Inc. The project manager for the Client is Dr. Cheryl Hildreth, Superintendent of Schools. The project manager for Performance Fact, Inc. is Mutiu Fagbayi, President/CEO. It is generally understood that additional individuals designated by the Client and Performance Fact project managers may play significant roles during certain phases of this project.

The professional services Agreement consists of two parts:

- A. The **planning phase** which covers the period from August 2021 to June 2022. This primary deliverable for this phase will be a community-wide, equity-centered Strategic Plan.
- B. The two-year **implementation phase** which covers the school years 2022-2023 and 2023-2024. The primary deliverable of this phase will be tools, training, and technical assistance to support disciplined implementation of the Strategic Plan and to strengthen leadership capacity at all levels.

**2. SCOPE OF WORK**

(See Exhibit A, Exhibit B attached)

**3. PAYMENT/EXPENSES**

The Client will pay Performance Fact a total of **\$179,600** for professional services for the *planning phase* during the **2021-2022 school year**, based on the scope of work outlined in *Exhibit A*.

That amount will cover fees for professional services and expenses associated with the project, including development and compilation of presentation materials and ongoing communication with the Superintendent, the Board, and other stakeholders, as outlined in the Exhibits.

Estimated professional fees for 2022-2023 and 2023-2024 school years can be found in Table 1. Actual fees for each year will be agreed by the client and Performance Fact before the start of each new school year.

**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.

October 15, 2021	\$35,920
December 15, 2021	\$35,920
February 15, 2022	\$35,920
March 15, 2022	\$35,920
April 15, 2022	\$35,920

**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

August 10, 2021

**WASHINGTON USD SIGNATORY**

**CHERYL P. HILDRETH, ED.D.**

Name (Please Print)



Signature

**SUPERINTENDENT**

Title

**OCT. 6. 2021**

Date





PERFORMANCE *fact*, INC.

*Developing leaders. Transforming Practices. Inspiring Results.*

**Table 1**

Overview of the 3-Year Professional Services  
**2021-2024 School Years**

School Year	Theme	Professional Fees*	Reference
2021-2022	<i>Moving Forward as One:</i> <b>Community-wide Equity-centered Strategic Planning</b> <b>Professional Fees</b> <b>Less Professional Discount</b>  <b><u>TOTAL CONTRACT PRICE</u></b>	 \$249,600 <b>(\$70,000)</b>  <b><u>\$179,600</u></b>	Exhibit A
2022-2023	<i>Getting It Done:</i> <b>Disciplined Implementation &amp; Leadership for Results</b>	\$190,000 - \$255,000	Exhibit B
2023-2024	<i>Getting It Done:</i> <b>Disciplined Implementation &amp; Leadership for Results</b>	\$190,000 - \$255,000	Exhibit B

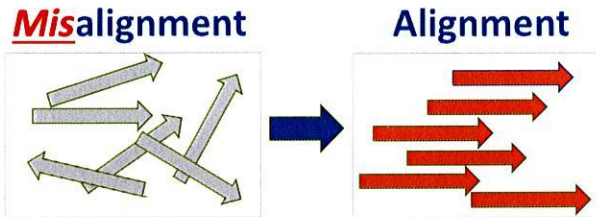
\* Professional Fees for the two implementation-support years (i.e., 2022-2023 and 2023-2024) are estimates at this point. Actual fees will be based on agreed-upon priorities and level of engagement for each school year.

## Exhibit A

# MOVING FORWARD AS ONE™ Community-wide Equity-centered Strategic Planning 2021-2022 SY

## Why Plan?

A primary purpose of planning is to facilitate unity of purpose, or alignment. 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.



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

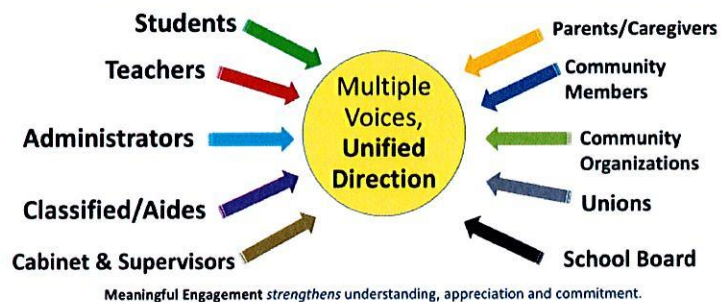
To be effective, the alignment process must proactively seek out and embrace the diverse voices of the organization's diverse stakeholders. If we want all stakeholders to be committed to and be meaningfully engaged in the *implementation* of the plan, it is wise to involve each stakeholder in the *development*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

## Embracing Diverse Voices & Perspectives

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 the community's diverse voices.

Each school system defines its relevant stakeholders, mindful of the paramount importance of broad-based, equitable representation within and across stakeholder groups.

## Embracing Diverse Voices & Perspectives



A Core Planning Team (CPT), comprised of representatives of all relevant stakeholder-groups works closely with the Performance Fact team to ensure that the process and outcomes of the strategic planning process are responsive to local needs and realities. The Core Planning Team serves as an "integrator" of all input from all participants; it provides a "reality check" throughout all phases of the planning exercise.



## Phases of the Strategic Planning Process

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

## What We Will Do: The Planning Model

### Equity-centered Strategic Planning Framework

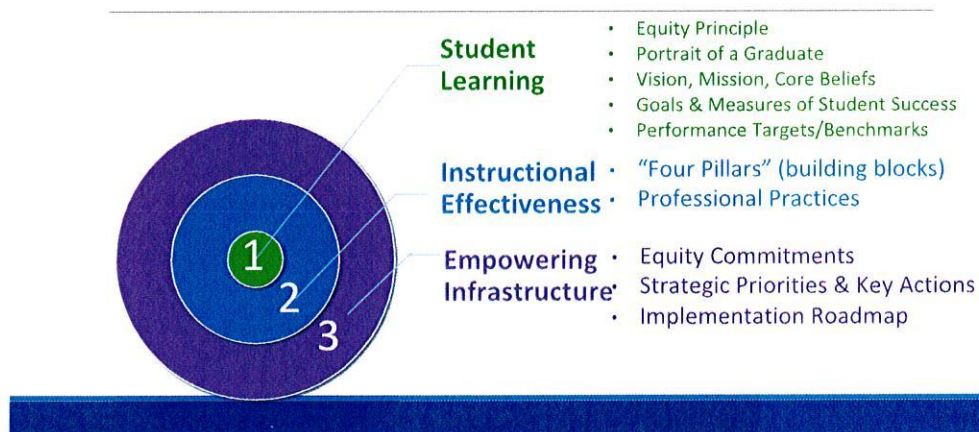


What data do we have?	What does the data say? <i>and</i> Why does the data look that way?	What are we going to do about it all?
Student Data from multiple sources	Student learning Areas of Strength and Areas of Concern  <i>and</i> "Root causes" (underlying causes) of the current state of student learning, growth, and success	<ul style="list-style-type: none"> <li>• Student Learning</li> <li>• Instructional Effectiveness</li> <li>• Empowering Infrastructure</li> </ul>

## What You Will Get: The Products

### Equity-centered Strategic Planning:

*"Ends and means in proper sequence."*





# Level 3 Strategic Planning Process: 2021/2022 SY

Level 1: Foundation   Level 2: Premier   Level 3: Premium   DYO: Design Your Own	<u>1</u>	<u>2</u>	<u>3</u>	<u>DYO</u>
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## D A T A

### What data do we have?

<b>Student Data</b>	Compile multi-year student data from multiple sources.	●	●	●
<b>Student Voice</b>	Administer online student survey <u>and</u> facilitate student focus group sessions.	●	●	●
<b>Equity Indicators &amp; Measures</b>	Compile comprehensive data on indicators of educational equity (based on the report of the National Academies of Science, Engineering & Medicine)		●	●
<b>Practitioners' Voices</b>	Administer online survey of teachers, leaders, and staff.			●
<b>Parent/Family Voice</b>	Administer online survey of parents and care-givers.			●
<b>Community Voice</b>	Administer online survey of community stakeholders.			●

## A N A L Y S I S

### What does the data say?

<b>4-Lens™ Analysis of Student Data</b>	Analyze qualitative and quantitative student data using the 4-Lens™ protocol [Lens 1 – Growth; Lens 2 – Consistency; Lens 3 – Equity; Lens 4 – Standards]; determine highest-priority Areas of Strength and Areas of Concern, based solely on student data.	●	●	●
<b>Equity Audit: Student Experiences</b>	Analyze disparities in student outcomes and access to opportunities and resources (based on the indicators of educational equity of the National Academies of Sciences, Engineering, and Medicine); determine the “equity challenges.”		●	●

## D I S C O V E R Y

### Why does the data look that way?

<b>Assessment of the Standards-aligned Instructional System</b>	Assess the effectiveness of core academic programs relative to the components of a standards-aligned system: A – Standards; B – Assessments; C – Curriculum; D – Instruction; E – Instructional Materials & Resources; F – Interventions & Acceleration.	●	●	●
<b>Root-cause Analysis</b>	Determine the underlying causes of the current state of student learning, growth, and success.	●	●	●
<b>Equity Audit: Professional Practices, Services, &amp; Supports</b>	Conduct a rigorous evaluation of professional practices, services, and supports to clarify the causes of the disparities in outcomes and access among student-groups (i.e., the “equity challenges”).			●

continued →

Level 1: Foundation   Level 2: Premier   Level 3: Premium   DYO: Design Your Own	1	2	3	DYO
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## SOLUTION What are we going to do about it all?

### 1. Student Learning

<b>Portrait of a Graduate</b>	Articulate the qualities and attributes of a high school graduate: the knowledge, skills, and disposition of a graduate equipped for success at the next level.		●	●	
<b>Core Purpose</b>	Clarify the vision, mission, and core values of the organization.	●	●	●	
<b>Goals, Measures, Benchmarks</b>	Set the goals for student success; define the measures of student progress towards the goals, and specify the performance benchmarks (i.e., "excellence targets").	●	●	●	
<b>Equity Principles and Equity Challenge</b>	Articulate the organization's equity commitments and define specific targets for closing/eliminating the disparities in outcomes and access for identified student-groups (i.e., "equity challenge" populations).		●	●	

### 2. Instructional Effectiveness

<b>"Four Pillars"</b>	Define the building blocks of a coherent, durable framework or theory of action; i.e., the capabilities that must be developed to realize the outcomes for students.	●	●	●	
<b>Professional Practices</b>	Outline the foundational teaching practices, leadership practices, and organizational practices essential for continuous improvement of instruction at every level.	●	●	●	
<b>Instructional Priorities: Core Subjects</b>	Outline the priorities for continuous improvement of each component of standards-aligned instructional system for the core subjects: A – Standards; B – Assessments; C – Curriculum; D – Instruction; E – Instructional Materials & Resources; F – Interventions & Acceleration.		●	●	
<b>Educational Strategies</b>	Define equity-focused high-impact strategies, processes, and for each Goal or Pillar (as appropriate).	●	●	●	

### 3. Empowering Infrastructure

<b>Mission-focused Supports &amp; Services</b>	Define system-level services and supports to support students and schools, and to cultivate a high-trust, equitable, continuous learning, and accountable culture.		●	●	
<b>Leadership for Results</b>	Outline recommendations for strengthening leadership competence, confidence, and courage at every level, and for championing a culture of equitable access and equal outcomes for all students.		●	●	
<b>Implementation Roadmap</b>	Develop a detailed roadmap for disciplined implementation, including explicit milestones for Year 1 and a blueprint for Year 2 and Year 3.		●	●	
<b>Needs-based Resource Allocation</b>	Develop guidelines for equitable allocation of resources, with particular attention to closing/eliminating disparities in outcomes and access among student-groups.			●	



## Exhibit B

# GETTING IT DONE!

## Disciplined Implementation & Leadership for Results

### 2022-2023 SY and 2023-2024 SY

### BACKGROUND

A results-focused plan is the first step towards realizing desired outcomes for student learning and achievement. However, without disciplined implementation, a plan flounders and may not live up to its promise. Therefore, after you “plan the work,” then, you must “work the plan” to achieve desired results.

This Proposal outlines the professional services that Performance Fact, Inc. (“PFI”) will provide to **Washington Unified School District (“WUSD”)**, to support the implementation of the district’s strategic plan, which will be developed during the 2021-2022 SY.

Performance Fact will facilitate the planning process during the 2021-2022 SY. When the planning phase is completed, Performance Fact will provide tools, training, and technical assistance to support the *implementation* of the strategic plan for two school years: 2022-2023 and 2023-2024.

### IMPLEMENTATION DESIGN

The **Roadmap for Disciplined Implementation** is a step-by-step process for implementing action plans. By dividing the work into discrete, calendar-driven chunks, leaders and practitioners can significantly reduce the “implementation gap” often associated with improvement plans. Performance Fact offers customizable tools, processes, and resources to assist the district in this regard.



## KEY DELIVERABLES (Illustrative)

START OF THE SCHOOL YEAR	
Chart the Course	
School-level Annual Action Plan	Develop an annual continuous improvement plan, aligned to the long-term strategic plan <u>and</u> to applicable State guidelines. Outline student achievement targets, practices and strategies, and professional development and collaboration themes for the year.
District-level Annual Operational Plan	Define annual district-level priorities and milestones, aligned to the data-informed needs identified in the school-level improvement plans. Be explicit about how district-level departments – including but not limited to the teaching-&-learning team – will support school level implementation.
Vital Signs Scorecard™ (Baseline)	Develop the Vital Signs Scorecard, or a dashboard of key indicators of progress regarding student learning, teaching practices, leadership practices, and organizational practices, as outlined in the strategic plan. The Vital Signs Scorecard offers timely, evidence-based feedback about adult practices (i.e., cause) and student progress (i.e., effect). Review/update the Vital Signs Scorecard at least once each month.
CPR Card™ (Baseline)	Create the CPR Card ( <u>C</u> ontinuous <u>P</u> rogress <u>R</u> eport <u>C</u> ard) to compile the milestones of progress (key tasks) across all improvement plans. Use the CPR Card to monitor the timeliness and quality of implementation of the day-to-day activities as well as long-term projects and priorities. Review the CPR Card as a team at least once each month.
EVERY WEEK	
Monitor & Adjust	
NA	<i>No direct <u>weekly</u> activities led by Performance Fact at this time.</i>
EVERY MONTH	
Learn & Collaborate	
Leadership in Action Network™	Participate in proficiency-based continuous leadership learning through the Leadership-in-Action Network sessions each month, with participation by a team of administrators and teachers from each school, as well as district-level leaders and managers. The Leadership in Action Network serves as a cadre of facilitators who can guide dissemination and coherence across the entire school system.
Leading with Data	Utilize a set of data tools to facilitate progress monitoring and data-informed decision-making regarding student learning and professional practices and strategies. Core data tools include: <ul style="list-style-type: none"> <li>• <u>4-Lens Data Analysis Protocol</u> to probe a variety of student data (including data from benchmark assessments, state tests, survey data, attendance and disciplinary referrals) across four perspectives: Growth – Consistency – Equity – Standards</li> <li>• <u>Vital Signs Scorecard™</u> to monitor key metrics of student learning, teaching practices, leadership practices, and organizational practices outlined in the strategic plan (or continuous improvement plan)</li> </ul>



	<ul style="list-style-type: none"> <li>• <u>CPR Card™</u> to track progress regarding implementation of milestones of progress</li> <li>• <u>Instructional Tracker</u> to track the quality and effectiveness of day-to-day instruction using instructional monitoring tools framed around the professional practices and educational strategies in the district's strategic plan. Use data from the observations to inform feedback, coaching, and support for teachers and staff.</li> <li>• <u>Voice Surveys</u> to provide feedback from students, educators, and external stakeholders regarding their perception of and engagement with the school system</li> </ul>
Executive Coaching / Coaching for High Performance	Provide job-embedded, targeted coaching and support for the Superintendent; serve as a "critical friend" and thought partner, and assist (as needed) in providing coaching and support for specified leaders.
Cabinet Capacity-building	Facilitate capacity-building for the Superintendent's Cabinet, including: <ul style="list-style-type: none"> <li>• Ongoing monitoring of progress regarding District-level Annual Operational Plan</li> <li>• Strengthening collaboration and collegial accountability across Department lines</li> <li>• Providing individualized coaching and support for Cabinet members, as needed</li> <li>• Assisting Cabinet members with development of their respective key indicators</li> <li>• Ensuring consistent cross-department alignment with the priorities in the Strategic Plan</li> </ul>

EVERY 6-12-WEEKS	Reflect & Plan
Data Summit™	<p>At the end of each 6-12-week cycle, compile data about student learning and professional practices, based on the priorities identified in the instructional plan for the cycle. Use the Data Summit protocol to:</p> <ul style="list-style-type: none"> <li>• Analyze student learning</li> <li>• Examine professional practices and strategies</li> <li>• Draw conclusions and plan for the next cycle</li> </ul> <p>Data sources for the Data Summit include instructional monitoring logs, formative/benchmark assessments, CPR Card and Vital Signs Scorecard.</p>
Parent Learning Forum	Facilitate at least one parent engagement event each quarter. Focus the event on continuous learning for the parents themselves; i.e., on topics/strategies that would enable parents to be more effective advocates for and partners in their child's learning, growth, and success.

MID-YEAR & END-OF-YEAR	Evaluate & Celebrate
Progress Report to the Community	Evaluate progress and celebrate student, team and school progress at the mid-point of the school year, relative to the priorities in the annual school -level and district-level continuous improvement plans. Share a progress report with all stakeholders (including community groups) regarding the priorities in the annual improvement plans. Repeat at end-of-year, with identification of priorities to be considered in the annual improvement plan for the next school year.
Student Surveys	Conduct at least one survey of a representative sampling of students, focused on questions that would elicit students' opinion and satisfaction about their educational experiences. Survey questions should address academic, social-emotional, and extra-/co-curricular aspects of the students' experiences. Survey may also include questions to provide longitudinal feedback about "repeat" questions.
Data-informed Equity Audit	<p>Conduct a data-informed equity audit to assess extent to which student-groups and schools have access equitable access to opportunities and resources that guarantee fair, just, and affirming experiences and produce equal outcomes for every student, without exception.</p> <p>Identify the habits of mind and practices that will facilitate courageous equitable actions at every level.</p>