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PERFORMANCE *fact*, INC.
Building leadership for courageous and accountable action in public education

BUSINESS OFFICE

OCT 16 2019

Scope of Professional Services
YAKIMA SCHOOL DISTRICT

(Yakima, WA)

Facilitation of Board's Vision, Mission, Core Values Exercise
BACKGROUND

This proposal outlines consulting, facilitation and documentation that Performance Fact will provide to **Yakima School District** (Yakima, Washington) regarding the facilitation of the Board's Vision, Mission, Core Values Exercise. The proposed scope of services covers the period August 2019 – January 2020. The Project Manager for Performance Fact is Mr. Mutiu O. Fagbayi (President/CEO). The Project Manager for Yakima School District is Mr. Trevor Greene (Superintendent).

PROJECT DELIVERABLES & PROFESSIONAL FEES

Performance Fact's professional services will include:

- See Exhibit A.3 for additional details.

The total professional fee for this project is **\$4,655** (August 2019 – January 2020).

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.

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:

November 2019	100% of total professional fees
TOTAL	\$4,655

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.

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.

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.

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

YAKIMA SCHOOL DISTRICT

By: 

Title: Superintendent

Date: Aug. 30, 2019

PERFORMANCE FACT, INC.

By: Mutiu O. Fagbayi

Mutiu O. Fagbayi

Title: President/CEO

Date: June 17, 2019



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Exhibit A.3

2019-2020 Professional Services

YAKIMA SCHOOL DISTRICT

17 June 2019 (rvsd)

1. Facilitation of Board's Vision, Mission, Core Values Exercise

- Facilitate the Board's deliberations focused on clarifying district Vision, Mission, and Core Values (or Core Beliefs)
- Ideally, this *process* should occur *before* the start of the Strategic Planning phase; however, if time is tight, it can be scheduled to run concurrently

Fees for Professional Services: \$4,655*

**Includes 5% professional discount*

BUSINESS OFFICE
OCT 16 2019

Figure 1

Moving Forward as One!

STRATEGIC PLANNING & ALIGNMENT

Professional Services by Level of Engagement

Components	Level	1	2	3
0. GETTING READY				
Design meetings/conference calls with Superintendent & key leaders/partners		⊙	⊙	⊙
Compilation of multi-year student data (academic, social-emotional, resiliency)		⊙	⊙	⊙
Assessment of current state of professional practices & instructional effectiveness		⊙	⊙	⊙
Assessment of current state of educational programs, supports, and services			⊙	⊙
Student Voice: Focus Group with sampling of all students (# = number of groups)	⊙1	⊙2	⊙3	
WE HEAR YOU! – Student Voice Survey* (optional; additional fees apply)	+ \$	+ \$	+ \$	
WE HEAR YOU! – Stakeholders' Voice Surveys* (optional; additional fees apply)	+ \$	+ \$	+ \$	
1. STUDENT LEARNING				
Building Trust & Authentic Relationships		⊙	⊙	⊙
Analysis of student achievement data (using 4-Lens® protocol)		⊙	⊙	⊙
Vision/Mission/Core Beliefs: Goals, Measures & Benchmarks for Student Success		⊙	⊙	⊙
2. INSTRUCTIONAL EFFECTIVENESS				
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		⊙	⊙	⊙
Priorities for strengthening the Instructional Core			DIY	⊙
3. EMPOWERING INFRASTRUCTURE				
Identification of system-wide Strategic Priorities			⊙	⊙
Defining system-wide Key Actions			DIY	⊙
4. STAKEHOLDER PARTICIPATION & "REALITY CHECK"				
Facilitation of Planning Teams (1=Core Team; 2=Instructional Focus Team; 3=Community Forum; 4=Board; 5=Campuses/Departments; 6=Alignment Team; 7=Principals & Administrators)	1-2-4	1-2-3-4-7	All Teams	
Preparation of Briefing Packets for stakeholder "reality check" sessions	⊙	⊙	⊙	
Facilitation of Community Forums (# = number of forums)		⊙2	⊙3	
5. REPORT-PREPARATION AND ROLL-OUT				
Compilation of 4-8-page Strategic Plan overview/highlights	⊙	⊙	⊙	
Compilation of full Strategic Plan report (# = approx. number of pages)		⊙12	⊙20	
Facilitation of roll-out to selected audiences (# = number of sessions)		⊙1	⊙2	
6. PREPARATION, FACILITATION, GUIDELINES FOR IMPLEMENTATION				
Total number of on-site visitation-days (for facilitation, consultation, etc.)	3-4	5-6	7-9	
Total number of hours of "virtual" interactions (e.g., conference calls)	~24	~30	~45	
Total number of off-site days (planning & preparation, report compilation)	~6	~8	~12	
Guidelines for Long-term Implementation and Priorities for Year 1	⊙	⊙	⊙	

* Customized survey for students in Grades 3-12; optional service

* Customized survey of stakeholders (e.g., teachers, staff, admin, parents, community)



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**Scope of Professional Services
YAKIMA SCHOOL DISTRICT
(Yakima, WA)**

Development of a Community-wide Strategic Plan

BACKGROUND

This proposal outlines consulting, facilitation and documentation that Performance Fact will provide to **Yakima School District** (Yakima, Washington) regarding the development of a community-wide strategic plan. The proposed scope of services covers the period August 2019 – January 2020. The Project Manager for Performance Fact is Mr. Mutiu O. Fagbayi (President/CEO). The Project Manager for Yakima School District is Mr. Trevor Greene (Superintendent).

PROJECT DELIVERABLES & PROFESSIONAL FEES

Performance Fact's professional services will include:

- See Exhibit A.1 for additional details.

The total professional fee for this project is **\$64,078** (August 2019 – January 2020).

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.

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:

September 2019	20% of total professional fees
October 2019	20% of total professional fees
November 2019	20% of total professional fees
December 2020	20% of total professional fees
January 2020	20% of total professional fees
TOTAL	\$64,078

DISPUTE RESOLUTION

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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.

EQUAL EMPLOYMENT OPPORTUNITY

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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.

YAKIMA SCHOOL DISTRICT

PERFORMANCE FACT, INC.

By: 

By: Mutiu O. Fagbayi

Mutiu O. Fagbayi

Title: Superintendent

Title: President/CEO

Date: Aug. 30, 2019

Date: June 17, 2019



PERFORMANCE *fact*, INC.

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Exhibit A.1

2019-2020 Professional Services

YAKIMA SCHOOL DISTRICT

17 June 2019 (*rvsd*)

1. Development of a Community-wide Strategic Plan

- See Level 2 in Figure 1 (below) for details
- Includes creation of an updated *Roadmap*, based on the outputs of the Strategic Planning deliberations
- Final Strategic Plan completed by mid-January 2020

Fees for Professional Services: \$64,078*

**Includes 5% professional discount*

Figure 1

Moving Forward as One!

STRATEGIC PLANNING & ALIGNMENT

Professional Services by Level of Engagement

Components	Level	1	2	3
0. GETTING READY				
Design meetings/conference calls with Superintendent & key leaders/partners		⊙	⊙	⊙
Compilation of multi-year student data (academic, social-emotional, resiliency)		⊙	⊙	⊙
Assessment of current state of professional practices & instructional effectiveness		⊙	⊙	⊙
Assessment of current state of educational programs, supports, and services			⊙	⊙
Student Voice: Focus Group with sampling of all students (# = number of groups)	⊙1	⊙2	⊙3	
WE HEAR YOU! – Student Voice Survey* (optional; additional fees apply)	+ \$	+ \$	+ \$	
WE HEAR YOU! – Stakeholders' Voice Surveys* (optional; additional fees apply)	+ \$	+ \$	+ \$	
1. STUDENT LEARNING				
Building Trust & Authentic Relationships		⊙	⊙	⊙
Analysis of student achievement data (using 4-Lens® protocol)		⊙	⊙	⊙
Vision/Mission/Core Beliefs; Goals, Measures & Benchmarks for Student Success		⊙	⊙	⊙
2. INSTRUCTIONAL EFFECTIVENESS				
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		⊙	⊙	⊙
Priorities for strengthening the Instructional Core			DIY	⊙
3. EMPOWERING INFRASTRUCTURE				
Identification of system-wide Strategic Priorities			⊙	⊙
Defining system-wide Key Actions			DIY	⊙
4. STAKEHOLDER PARTICIPATION & "REALITY CHECK"				
Facilitation of Planning Teams (1=Core Team; 2=Instructional Focus Team; 3=Community Forum; 4=Board; 5=Campuses/Departments; 6=Alignment Team; 7=Principals & Administrators)	1-2-4	1-2-3-4-7	All Teams	
Preparation of Briefing Packets for stakeholder "reality check" sessions	⊙	⊙	⊙	
Facilitation of Community Forums (# = number of forums)		⊙2	⊙3	
5. REPORT-Preparation and Roll-out				
Compilation of 4-8-page Strategic Plan overview/highlights	⊙	⊙	⊙	
Compilation of full Strategic Plan report (# = approx. number of pages)		⊙12	⊙20	
Facilitation of roll-out to selected audiences (# = number of sessions)		⊙1	⊙2	
6. PREPARATION, FACILITATION, GUIDELINES FOR IMPLEMENTATION				
Total number of on-site visitation-days (for facilitation, consultation, etc.)	3-4	5-6	7-9	
Total number of hours of "virtual" interactions (e.g., conference calls)	~24	~30	~45	
Total number of off-site days (planning & preparation, report compilation)	~6	~8	~12	
Guidelines for Long-term Implementation and Priorities for Year 1	⊙	⊙	⊙	

* Customized survey for students in Grades 3-12; optional service

* Customized survey of stakeholders (e.g., teachers, staff, admin, parents, community)

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PERFORMANCE *fact*, INC.

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**Scope of Professional Services
YAKIMA SCHOOL DISTRICT
(Yakima, WA)**

Strategic Planning

BACKGROUND

This proposal outlines consulting, facilitation and documentation that Performance Fact will provide to **Yakima School District** (Yakima, Washington) regarding community-wide strategic planning. The proposed scope of services covers the period August 2019 – January 2020. The Project Manager for Performance Fact is Mr. Mutiu O. Fagbayi (President/CEO). The Project Manager for Yakima School District is Mr. Trevor Greene (Superintendent).

PROJECT DELIVERABLES & PROFESSIONAL FEES

Performance Fact's professional services will include:

- See Exhibit A for additional details.

The total professional fee for this project is **\$75,145** (August 2019 – January 2020).

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.

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 2019	20% of total professional fees
November 2019	20% of total professional fees
December 2019	20% of total professional fees
January 2020	20% of total professional fees
February 2020	20% of total professional fees
TOTAL	\$75,145

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.

EQUAL EMPLOYMENT OPPORTUNITY

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OWNERSHIP OF MATERIALS

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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.

YAKIMA SCHOOL DISTRICT

PERFORMANCE FACT, INC.

By: 

By: Mutiu O. Fagbayi
Mutiu O. Fagbayi

Title: _____

Title: President/CEO

Date: _____

Date: June 17, 2019



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Exhibit A

2019-2020 Professional Services

YAKIMA SCHOOL DISTRICT

17 June 2019 (rvsd)

1. Development of a Community-wide Strategic Plan

- See Level 2 in Figure 1 (below) for details
- Includes creation of an updated *Roadmap*, based on the outputs of the Strategic Planning deliberations
- Final Strategic Plan completed by mid-January 2020

Fees for Professional Services: \$67,450*

2. Development of Profile of a Yakima Graduate

- Facilitate community-wide conversations focused on reaching consensus on the knowledge, skills, and disposition of a Yakima high school graduate
- Engage diverse cross-section of the Yakima community in the process, in ways that ensure equitable opportunities for all groups to participate meaningfully
- Final product will be an easy-to-understand document, available in English and Spanish
- Ideally, this *Profile* exercise should occur *before* the start of the Strategic Planning phase; however, if time is tight, it can be scheduled to run concurrently

Fees for Professional Services: \$6,750

3. Facilitation of Board's Vision, Mission, Core Values Exercise

- Facilitate the Board's deliberations focused on clarifying district Vision, Mission, and Core Values (or Core Beliefs)
- Ideally, this *process* should occur *before* the start of the Strategic Planning phase; however, if time is tight, it can be scheduled to run concurrently

Fees for Professional Services: \$4,900

4. If all three Options, Total Fees = \$75,145* (i.e., \$79,100 less 5% professional discount)

* Survey of students in Grades 3-12 – if requested – will incur additional \$2,700-\$3,200
 + assumes on-site visits/meetings can be scheduled so that multiple activities can occur concurrently, whenever possible, to minimize costs to the district

Figure 1

Moving Forward as One!

STRATEGIC PLANNING & ALIGNMENT

Professional Services by Level of Engagement

Components	Level	1	2	3
0. GETTING READY				
Design meetings/conference calls with Superintendent & key leaders/partners		⊙	⊙	⊙
Compilation of multi-year student data (academic, social-emotional, resiliency)		⊙	⊙	⊙
Assessment of current state of professional practices & instructional effectiveness		⊙	⊙	⊙
Assessment of current state of educational programs, supports, and services			⊙	⊙
Student Voice: Focus Group with sampling of all students (# = number of groups)	⊙1	⊙2	⊙3	
WE HEAR YOU! – Student Voice Survey* (optional; additional fees apply)	+ \$	+ \$	+ \$	
WE HEAR YOU! – Stakeholders' Voice Surveys* (optional; additional fees apply)	+ \$	+ \$	+ \$	
1. STUDENT LEARNING				
Building Trust & Authentic Relationships		⊙	⊙	⊙
Analysis of student achievement data (using 4-Lens® protocol)		⊙	⊙	⊙
Vision/Mission/Core Beliefs; Goals, Measures & Benchmarks for Student Success		⊙	⊙	⊙
2. INSTRUCTIONAL EFFECTIVENESS				
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		⊙	⊙	⊙
Priorities for strengthening the Instructional Core			DIY	⊙
3. EMPOWERING INFRASTRUCTURE				
Identification of system-wide Strategic Priorities		⊙		⊙
Defining system-wide Key Actions			DIY	⊙
4. STAKEHOLDER PARTICIPATION & "REALITY CHECK"				
Facilitation of Planning Teams (1=Core Team; 2=Instructional Focus Team; 3=Community Forum; 4=Board; 5=Campuses/Departments; 6=Alignment Team; 7=Principals & Administrators)	1-2-4	1-2-3-4-7	All Teams	
Preparation of Briefing Packets for stakeholder "reality check" sessions	⊙	⊙	⊙	
Facilitation of Community Forums (# = number of forums)		⊙2	⊙3	
5. REPORT-PREPARATION AND ROLL-OUT				
Compilation of 4-8-page Strategic Plan overview/highlights	⊙	⊙	⊙	
Compilation of full Strategic Plan report (# = approx. number of pages)		⊙12	⊙20	
Facilitation of roll-out to selected audiences (# = number of sessions)		⊙1	⊙2	
6. PREPARATION, FACILITATION, GUIDELINES FOR IMPLEMENTATION				
Total number of on-site visitation-days (for facilitation, consultation, etc.)	3-4	5-6	7-9	
Total number of hours of "virtual" interactions (e.g., conference calls)	~24	~30	~45	
Total number of off-site days (planning & preparation, report compilation)	~6	~8	~12	
Guidelines for Long-term Implementation and Priorities for Year 1	⊙	⊙	⊙	

* Customized survey for students in Grades 3-12; optional service

* Customized survey of stakeholders (e.g., teachers, staff, admin, parents, community)

Yakima School District | Proposed Strategic Planning Calendar

Tentative schedule pending finalization with client; dates not firm commitment until after formal contract

Date	Team/Focus	
August-early September	Off-site prep by Performance Fact Team	<ul style="list-style-type: none"> (Off-site) Review of recent community assessments, surveys, other existing locally available data/information
August-early September	C&I / Educational Services	<ul style="list-style-type: none"> Data-gathering and analysis (student data and professional practices)
Sept 16	C&I / Educational Services	<ul style="list-style-type: none"> Assessment of current state of standards-aligned instruction and educational programs
Sept 16	Student Voice (Focus Groups)	<ul style="list-style-type: none"> Conversations with diverse cross-section of students; one group per level – elementary, middle, high school; 1 approx. 60-75-minute per session.
Sept 16	Board Check-in	<ul style="list-style-type: none"> Intro session with the Board (preview to full-day on Sep. 17)
Sept 17	Board full-day session	<ul style="list-style-type: none"> Full-day Board workshop regarding <i>Profile of a Graduate; Vision, Mission, Core Values</i>
Sept 23-24	Core Planning Team/IF Team – Session #1	<ul style="list-style-type: none"> Representatives of <u>all</u> community stakeholder groups (2-day session); full-day sessions
Sept 23 <u>or</u> 24	Alignment Team – Session #1	<ul style="list-style-type: none"> Community leaders and opinion-shapers (from multiple sectors); approx. 1-hour session
Sept 23	Board Check-in	<ul style="list-style-type: none"> Board status report and/or workshop regarding <i>Profile of a Graduate; Vision, Mission, Core Values</i>
Oct 14-15	Core Planning Team/IF Team – Session #2	<ul style="list-style-type: none"> Representatives of <u>all</u> community stakeholder groups (2-day session); full-day sessions
Oct 14 <u>or</u> 15	Alignment Team – Session #2	<ul style="list-style-type: none"> Community leaders and opinion-shapers (from multiple sectors), approx. 1-hour session
Oct 14	Board Check-in	<ul style="list-style-type: none"> Board status report and/or workshop regarding <i>Profile of a Graduate; Vision, Mission, Core Values</i> [if no conflict with evening Community Forum]
Oct 14	Community Forum #1	<ul style="list-style-type: none"> "Reality check" session with community stakeholders; evening event open to <u>all</u>; review <u>all</u> activities to-date: <i>Strategic Plan, Profile, Vision/Mission/Core Values</i>
Oct 15	Community Forum #2	<ul style="list-style-type: none"> "Reality check" session with community stakeholders; evening event open to <u>all</u>; review <u>all</u> activities to-date: <i>Strategic Plan, Profile, Vision/Mission/Core Values</i>
Oct 23-Nov 13	School/ Department "Reality Check"	<ul style="list-style-type: none"> "Reality check" of draft strategic plan by staff of <u>each</u> school & <u>each</u> Department; co-facilitated by planning team members; also, to Community Groups
Nov 18	Core Planning Team/IF Team – Session #3	<ul style="list-style-type: none"> Representatives of <u>all</u> community stakeholder groups; full-day session
Nov 18	Alignment Team – Session #3	<ul style="list-style-type: none"> Community leaders and opinion-shapers (from multiple sectors); approx. 1-hour session
Nov 18	Board Update/Check In	<ul style="list-style-type: none"> Update board on progress to date [Note: Could also be extended to include work session regarding <i>Graduate Profile</i> and to wrap up <i>Vision/Mission/Core Values</i>]
Late Nov-Early Dec 2019	Strategic Plan compilation (mostly off-site work)	<ul style="list-style-type: none"> (Off-site) Successive drafts of the Strategic Plan; periodically reviewed with stakeholders, as appropriate
Dec 9	Core Planning Team/IF Team – Session #4 (Rollout of Draft Plan)	<ul style="list-style-type: none"> Half-day session; review of first complete draft of Strategic Plan
Dec 9	Alignment Team – Session #4	<ul style="list-style-type: none"> Review of first complete draft of Strategic Plan
Dec 9	Board Update/Check In	<ul style="list-style-type: none"> Update board on progress to date
Jan 13	Formal Board Approval of Strategic Plan	<ul style="list-style-type: none"> Submission of Final Report/Formal Board Approval (Note: Periodic check-in and status updates to Board and Cabinet throughout the process)



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**Scope of Professional Services
YAKIMA SCHOOL DISTRICT
(Yakima, WA)
Strategic Planning**

BACKGROUND

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PROJECT DELIVERABLES & PROFESSIONAL FEES

Performance Fact's professional services will include:

- See Exhibit A for additional details.

The total professional fee for this project is **\$75,145** (August 2019 – January 2020).

RESCHEDULING/CANCELLATION POLICY

Rescheduling/Cancellations of Specific Events/Activities per Contract:

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LOGISTICS

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PAYMENT SCHEDULE

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TOTAL	\$75,145

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YAKIMA SCHOOL DISTRICT

By: _____

Title: _____

Date: _____

PERFORMANCE FACT, INC.

By: Mutiu O. Fagbayi

Mutiu O. Fagbayi

Title: President/CEO

Date: June 17, 2019



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Exhibit A

2019-2020 Professional Services

YAKIMA SCHOOL DISTRICT

17 June 2019 (rvsd)

1. Development of a Community-wide Strategic Plan

- See Level 2 in Figure 1 (below) for details
- Includes creation of an updated *Roadmap*, based on the outputs of the Strategic Planning deliberations
- Final Strategic Plan completed by mid-January 2020

Fees for Professional Services: \$67,450*

2. Development of Profile of a Yakima Graduate

- Facilitate community-wide conversations focused on reaching consensus on the knowledge, skills, and disposition of a Yakima high school graduate
- Engage diverse cross-section of the Yakima community in the process, in ways that ensure equitable opportunities for all groups to participate meaningfully
- Final product will be an easy-to-understand document, available in English and Spanish
- Ideally, this *Profile* exercise should occur *before* the start of the Strategic Planning phase; however, if time is tight, it can be scheduled to run concurrently

Fees for Professional Services: \$6,750

3. Facilitation of Board's Vision, Mission, Core Values Exercise

- Facilitate the Board's deliberations focused on clarifying district Vision, Mission, and Core Values (or Core Beliefs)
- Ideally, this *process* should occur *before* the start of the Strategic Planning phase; however, if time is tight, it can be scheduled to run concurrently

Fees for Professional Services: \$4,900

4. If all three Options, Total Fees = \$75,145⁺ (i.e., \$79,100 less 5% professional discount)

* Survey of students in Grades 3-12 – if requested – will incur additional \$2,700-\$3,200

+ assumes on-site visits/meetings can be scheduled so that multiple activities can occur concurrently, whenever possible, to minimize costs to the district

Figure 1

Moving Forward as One!

STRATEGIC PLANNING & ALIGNMENT

Professional Services by Level of Engagement

Components	Level	1	2	3
0. GETTING READY				
Design meetings/conference calls with Superintendent & key leaders/partners		⊙	⊙	⊙
Compilation of multi-year student data (academic, social-emotional, resiliency)		⊙	⊙	⊙
Assessment of current state of professional practices & instructional effectiveness		⊙	⊙	⊙
Assessment of current state of educational programs, supports, and services			⊙	⊙
Student Voice: Focus Group with sampling of all students (# = number of groups)	⊙1	⊙2	⊙3	
WE HEAR YOU! – Student Voice Survey* (optional; additional fees apply)	+\$	+\$	+\$	
WE HEAR YOU! – Stakeholders' Voice Surveys* (optional; additional fees apply)	+\$	+\$	+\$	
1. STUDENT LEARNING				
Building Trust & Authentic Relationships		⊙	⊙	⊙
Analysis of student achievement data (using 4-Lens® protocol)		⊙	⊙	⊙
Vision/Mission/Core Beliefs; Goals, Measures & Benchmarks for Student Success		⊙	⊙	⊙
2. INSTRUCTIONAL EFFECTIVENESS				
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		⊙	⊙	⊙
Priorities for strengthening the Instructional Core			DIY	⊙
3. EMPOWERING INFRASTRUCTURE				
Identification of system-wide Strategic Priorities		⊙		⊙
Defining system-wide Key Actions			DIY	⊙
4. STAKEHOLDER PARTICIPATION & "REALITY CHECK"				
Facilitation of Planning Teams (1=Core Team; 2=Instructional Focus Team; 3=Community Forum; 4=Board; 5=Campuses/Departments; 6=Alignment Team; 7=Principals & Administrators)	1-2-4	1-2-3-4-7	All Teams	
Preparation of Briefing Packets for stakeholder "reality check" sessions	⊙	⊙	⊙	
Facilitation of Community Forums (# = number of forums)		⊙2	⊙3	
5. REPORT-PREPARATION AND ROLL-OUT				
Compilation of 4-8-page Strategic Plan overview/highlights	⊙	⊙	⊙	
Compilation of full Strategic Plan report (# = approx. number of pages)		⊙12	⊙20	
Facilitation of roll-out to selected audiences (# = number of sessions)		⊙1	⊙2	
6. PREPARATION, FACILITATION, GUIDELINES FOR IMPLEMENTATION				
Total number of on-site visitation-days (for facilitation, consultation, etc.)	3-4	5-6	7-9	
Total number of hours of "virtual" interactions (e.g., conference calls)	~24	~30	~45	
Total number of off-site days (planning & preparation, report compilation)	~6	~8	~12	
Guidelines for Long-term Implementation and Priorities for Year 1	⊙	⊙	⊙	

* Customized survey for students in Grades 3-12; optional service

* Customized survey of stakeholders (e.g., teachers, staff, admin, parents, community)

Yakima School District | Proposed Strategic Planning Calendar

Tentative schedule pending finalization with client; dates not firm commitment until after formal contract

Date	Team/Focus	
August-early September	Off-site prep by Performance Fact Team	<ul style="list-style-type: none"> (Off-site) Review of recent community assessments, surveys, other existing locally available data/information
August-early September	C&I / Educational Services	<ul style="list-style-type: none"> Data-gathering and analysis (student data and professional practices)
Sept 16	C&I / Educational Services	<ul style="list-style-type: none"> Assessment of current state of standards-aligned instruction and educational programs
Sept 16	Student Voice (Focus Groups)	<ul style="list-style-type: none"> Conversations with diverse cross-section of students; one group per level – elementary, middle, high school; 1 approx. 60-75-minute per session.
Sept 16	Board Check-in	<ul style="list-style-type: none"> Intro session with the Board (preview to full-day on Sep. 17)
Sept 17	Board full-day session	<ul style="list-style-type: none"> Full-day Board workshop regarding <i>Profile of a Graduate; Vision, Mission, Core Values</i>
Sept 23-24	Core Planning Team/IF Team – Session #1	<ul style="list-style-type: none"> Representatives of <u>all</u> community stakeholder groups (2-day session); full-day sessions
Sept 23 <u>or</u> 24	Alignment Team – Session #1	<ul style="list-style-type: none"> Community leaders and opinion-shapers (from multiple sectors); approx. 1-hour session
Sept 23	Board Check-in	<ul style="list-style-type: none"> Board status report and/or workshop regarding <i>Profile of a Graduate; Vision, Mission, Core Values</i>
Oct 14-15	Core Planning Team/IF Team – Session #2	<ul style="list-style-type: none"> Representatives of <u>all</u> community stakeholder groups (2-day session); full-day sessions
Oct 14 <u>or</u> 15	Alignment Team – Session #2	<ul style="list-style-type: none"> Community leaders and opinion-shapers (from multiple sectors); approx. 1-hour session
Oct 14	Board Check-in	<ul style="list-style-type: none"> Board status report and/or workshop regarding <i>Profile of a Graduate; Vision, Mission, Core Values</i> [if no conflict with evening Community Forum]
Oct 14	Community Forum #1	<ul style="list-style-type: none"> "Reality check" session with community stakeholders; evening event open to <u>all</u>; review <u>all</u> activities to-date: <i>Strategic Plan, Profile, Vision/Mission/Core Values</i>
Oct 15	Community Forum #2	<ul style="list-style-type: none"> "Reality check" session with community stakeholders; evening event open to <u>all</u>; review <u>all</u> activities to-date: <i>Strategic Plan, Profile, Vision/Mission/Core Values</i>
Oct 23-Nov 13	School/ Department "Reality Check"	<ul style="list-style-type: none"> "Reality check" of draft strategic plan by staff of <u>each</u> school & <u>each</u> Department; co-facilitated by planning team members; also, to Community Groups
Nov 18	Core Planning Team/IF Team – Session #3	<ul style="list-style-type: none"> Representatives of <u>all</u> community stakeholder groups; full-day session
Nov 18	Alignment Team – Session #3	<ul style="list-style-type: none"> Community leaders and opinion-shapers (from multiple sectors); approx. 1-hour session
Nov 18	Board Update/Check In	<ul style="list-style-type: none"> Update board on progress to date [Note: Could also be extended to include work session regarding <i>Graduate Profile</i> and to wrap up <i>Vision/Mission/Core Values</i>]
Late Nov-Early Dec 2019	Strategic Plan compilation (mostly off-site work)	<ul style="list-style-type: none"> (Off-site) Successive drafts of the Strategic Plan; periodically reviewed with stakeholders, as appropriate
Dec 9	Core Planning Team/IF Team – Session #4 (Rollout of Draft Plan)	<ul style="list-style-type: none"> Half-day session; review of first complete draft of Strategic Plan
Dec 9	Alignment Team – Session #4	<ul style="list-style-type: none"> Review of first complete draft of Strategic Plan
Dec 9	Board Update/Check In	<ul style="list-style-type: none"> Update board on progress to date
Jan 13	Formal Board Approval of Strategic Plan	<ul style="list-style-type: none"> Submission of Final Report/Formal Board Approval (Note: Periodic check-in and status updates to Board and Cabinet throughout the process)

Form

W-9(Rev. December 2014)
Department of the Treasury
Internal Revenue Service**Request for Taxpayer
Identification Number and Certification****Give Form to the
requester. Do not
send to the IRS.**

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
PERFORMANCE FACT, INC.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification; check only **one** of the following seven boxes:

☐ Individual/sole proprietor or single-member LLC
☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____
Note. For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner.
☐ Other (see instructions) ▶ _____

☒ C Corporation
☐ S Corporation
☐ Partnership
☐ Trust/estate

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):
 Exempt payee code (if any) _____
 Exemption from FATCA reporting code (if any) _____
(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.)
333 HEGENBERGER RD STE 204

6 City, state, and ZIP code
OAKLAND, CALIFORNIA 94621

7 List account number(s) here (optional)

Requester's name and address (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note. If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

Social security number

				-					
--	--	--	--	---	--	--	--	--	--

or

Employer identification number


1	6	-	1	5	3	8	3	2	1
---	---	---	---	---	---	---	---	---	---

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

Sign Here **Signature of U.S. person ▶**  **Date ▶** JULY 17, 2019

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at www.irs.gov/fw9.**Purpose of Form**

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)

- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding?* on page 2.

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting?* on page 2 for further information.



PERFORMANCE *fact*, INC.

Building leadership for courageous and accountable action in public education

**Scope of Professional Services
YAKIMA SCHOOL DISTRICT
(Yakima, WA)
Development of a Profile of a Yakima Graduate**

BACKGROUND

This proposal outlines consulting, facilitation and documentation that Performance Fact will provide to **Yakima School District** (Yakima, Washington) regarding the development of a profile of a Yakima Graduate. The proposed scope of services covers the period August 2019 – January 2020. The Project Manager for Performance Fact is Mr. Mutiu O. Fagbayi (President/CEO). The Project Manager for Yakima School District is Mr. Trevor Greene (Superintendent).

PROJECT DELIVERABLES & PROFESSIONAL FEES

Performance Fact's professional services will include:

- See Exhibit A.2 for additional details.

The total professional fee for this project is **\$6,412** (August 2019 – January 2020).

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.

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 2019	50% of total professional fees
December 2019	50% of total professional fees
TOTAL	\$6,412

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.

BUSINESS OFFICE
OCT 16 2019

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.

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.

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

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

By:  _____

By: Mutiu O. Fagbayi
Mutiu O. Fagbayi

Title: Superintendent

Title: President/CEO

Date: Aug. 30, 2019

Date: June 17, 2019



PERFORMANCE *fact*, INC.

Developing leaders. Transforming Practices. Inspiring Results.

Exhibit A.2

2019-2020 Professional Services

YAKIMA SCHOOL DISTRICT

17 June 2019 (rvsd)

1. Development of Profile of a Yakima Graduate

- Facilitate community-wide conversations focused on reaching consensus on the knowledge, skills, and disposition of a Yakima high school graduate
- Engage diverse cross-section of the Yakima community in the process, in ways that ensure equitable opportunities for all groups to participate meaningfully
- Final product will be an easy-to-understand document, available in English and Spanish
- Ideally, this *Profile* exercise should occur *before* the start of the Strategic Planning phase; however, if time is tight, it can be scheduled to run concurrently

Fees for Professional Services: \$6,412*

**Includes 5% professional discount*

Figure 1

Moving Forward as One!

STRATEGIC PLANNING & ALIGNMENT

Professional Services by Level of Engagement

Components	Level	1	2	3
0. GETTING READY				
Design meetings/conference calls with Superintendent & key leaders/partners		⊙	⊙	⊙
Compilation of multi-year student data (academic, social-emotional, resiliency)		⊙	⊙	⊙
Assessment of current state of professional practices & instructional effectiveness		⊙	⊙	⊙
Assessment of current state of educational programs, supports, and services			⊙	⊙
Student Voice: Focus Group with sampling of all students (# = number of groups)	⊙1	⊙2	⊙3	
WE HEAR YOU! – Student Voice Survey* (optional; additional fees apply)	+ \$	+ \$	+ \$	
WE HEAR YOU! – Stakeholders' Voice Surveys* (optional; additional fees apply)	+ \$	+ \$	+ \$	
1. STUDENT LEARNING				
Building Trust & Authentic Relationships		⊙	⊙	⊙
Analysis of student achievement data (using 4-Lens® protocol)		⊙	⊙	⊙
Vision/Mission/Core Beliefs; Goals, Measures & Benchmarks for Student Success		⊙	⊙	⊙
2. INSTRUCTIONAL EFFECTIVENESS				
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		⊙	⊙	⊙
Priorities for strengthening the Instructional Core			DIY	⊙
3. EMPOWERING INFRASTRUCTURE				
Identification of system-wide Strategic Priorities			⊙	⊙
Defining system-wide Key Actions			DIY	⊙
4. STAKEHOLDER PARTICIPATION & "REALITY CHECK"				
Facilitation of Planning Teams (1=Core Team; 2=Instructional Focus Team; 3=Community Forum; 4=Board; 5=Campuses/Departments; 6=Alignment Team; 7=Principals & Administrators)	1-2-4	1-2-3-4-7	All Teams	
Preparation of Briefing Packets for stakeholder "reality check" sessions	⊙	⊙	⊙	
Facilitation of Community Forums (# = number of forums)		⊙2	⊙3	
5. REPORT-PREPARATION AND ROLL-OUT				
Compilation of 4-8-page Strategic Plan overview/highlights	⊙	⊙	⊙	
Compilation of full Strategic Plan report (# = approx. number of pages)		⊙12	⊙20	
Facilitation of roll-out to selected audiences (# = number of sessions)		⊙1	⊙2	
6. PREPARATION, FACILITATION, GUIDELINES FOR IMPLEMENTATION				
Total number of on-site visitation-days (for facilitation, consultation, etc.)	3-4	5-6	7-9	
Total number of hours of "virtual" interactions (e.g., conference calls)	~24	~30	~45	
Total number of off-site days (planning & preparation, report compilation)	~6	~8	~12	
Guidelines for Long-term Implementation and Priorities for Year 1	⊙	⊙	⊙	

* Customized survey for students in Grades 3-12; optional service

* Customized survey of stakeholders (e.g., teachers, staff, admin, parents, community)

70019.000



PERFORMANCE *fact*, INC.

Building leadership for courageous and accountable action in public education

**Scope of Professional Services
YAKIMA SCHOOL DISTRICT
(Yakima, WA)
Strategic Planning**

BACKGROUND

This proposal outlines consulting, facilitation and documentation that Performance Fact will provide to **Yakima School District** (Yakima, Washington) regarding community-wide strategic planning. The proposed scope of services covers the period August 2019 – January 2020. The Project Manager for Performance Fact is Mr. Mutiu O. Fagbayi (President/CEO). The Project Manager for Yakima School District is Mr. Trevor Greene (Superintendent).

PROJECT DELIVERABLES & PROFESSIONAL FEES

Performance Fact's professional services will include:

- See Exhibit A for additional details.

The total professional fee for this project is **\$75,145** (August 2019 – January 2020).

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.

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 2019	20% of total professional fees
November 2019	20% of total professional fees
December 2019	20% of total professional fees
January 2020	20% of total professional fees
February 2020	20% of total professional fees
TOTAL	\$75,145

BUSINESS OFFICE

OCT 16 2019

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.

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.

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.

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

YAKIMA SCHOOL DISTRICT

By:  _____

Title: Superintendent

Date: 6-19-2019

PERFORMANCE FACT, INC.

By: Mutiu O. Fagbayi
Mutiu O. Fagbayi

Title: President/CEO

Date: June 17, 2019



PERFORMANCE *fact*, INC.

Developing leaders. Transforming Practices. Inspiring Results.

Exhibit A

2019-2020 Professional Services YAKIMA SCHOOL DISTRICT 17 June 2019 (rvsd)

1. Development of a Community-wide Strategic Plan

- See Level 2 in Figure 1 (below) for details
- Includes creation of an updated *Roadmap*, based on the outputs of the Strategic Planning deliberations
- Final Strategic Plan completed by mid-January 2020

Fees for Professional Services: \$67,450*

2. Development of Profile of a Yakima Graduate

- Facilitate community-wide conversations focused on reaching consensus on the knowledge, skills, and disposition of a Yakima high school graduate
- Engage diverse cross-section of the Yakima community in the process, in ways that ensure equitable opportunities for all groups to participate meaningfully
- Final product will be an easy-to-understand document, available in English and Spanish
- Ideally, this *Profile* exercise should occur *before* the start of the Strategic Planning phase; however, if time is tight, it can be scheduled to run concurrently

Fees for Professional Services: \$6,750

3. Facilitation of Board's Vision, Mission, Core Values Exercise

- Facilitate the Board's deliberations focused on clarifying district Vision, Mission, and Core Values (or Core Beliefs)
- Ideally, this *process* should occur *before* the start of the Strategic Planning phase; however, if time is tight, it can be scheduled to run concurrently

Fees for Professional Services: \$4,900

4. If all three Options, Total Fees = \$75,145⁺ (i.e., \$79,100 less 5% professional discount)

* Survey of students in Grades 3-12 – if requested – will incur additional \$2,700-\$3,200

+ assumes on-site visits/meetings can be scheduled so that multiple activities can occur concurrently, whenever possible, to minimize costs to the district

Figure 1

Moving Forward as One!

STRATEGIC PLANNING & ALIGNMENT

Professional Services by Level of Engagement

Components	Level	1	2	3
0. GETTING READY				
Design meetings/conference calls with Superintendent & key leaders/partners	⊙	⊙	⊙	
Compilation of multi-year student data (academic, social-emotional, resiliency)	⊙	⊙	⊙	
Assessment of current state of professional practices & instructional effectiveness	⊙	⊙	⊙	
Assessment of current state of educational programs, supports, and services		⊙	⊙	
Student Voice: Focus Group with sampling of all students (# = number of groups)	⊙1	⊙2	⊙3	
WE HEAR YOU! – Student Voice Survey* (optional; additional fees apply)	+\$	+\$	+\$	
WE HEAR YOU! – Stakeholders' Voice Surveys* (optional; additional fees apply)	+\$	+\$	+\$	
1. STUDENT LEARNING				
Building Trust & Authentic Relationships	⊙	⊙	⊙	
Analysis of student achievement data (using 4-Lens® protocol)	⊙	⊙	⊙	
Vision/Mission/Core Beliefs; Goals, Measures & Benchmarks for Student Success	⊙	⊙	⊙	
2. INSTRUCTIONAL EFFECTIVENESS				
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	⊙	⊙	⊙	
Priorities for strengthening the Instructional Core		DIY	⊙	
3. EMPOWERING INFRASTRUCTURE				
Identification of system-wide Strategic Priorities		⊙	⊙	
Defining system-wide Key Actions		DIY	⊙	
4. STAKEHOLDER PARTICIPATION & "REALITY CHECK"				
Facilitation of Planning Teams (1=Core Team; 2=Instructional Focus Team; 3=Community Forum; 4=Board; 5=Campuses/Departments; 6=Alignment Team; 7=Principals & Administrators)	1-2-4	1-2-3-4-7	All Teams	
Preparation of Briefing Packets for stakeholder "reality check" sessions	⊙	⊙	⊙	
Facilitation of Community Forums (# = number of forums)		⊙2	⊙3	
5. REPORT-PREPARATION AND ROLL-OUT				
Compilation of 4-8-page Strategic Plan overview/highlights	⊙	⊙	⊙	
Compilation of full Strategic Plan report (# = approx. number of pages)		⊙12	⊙20	
Facilitation of roll-out to selected audiences (# = number of sessions)		⊙1	⊙2	
6. PREPARATION, FACILITATION, GUIDELINES FOR IMPLEMENTATION				
Total number of on-site visitation-days (for facilitation, consultation, etc.)	3-4	5-6	7-9	
Total number of hours of "virtual" interactions (e.g., conference calls)	~24	~30	~45	
Total number of off-site days (planning & preparation, report compilation)	~6	~8	~12	
Guidelines for Long-term Implementation and Priorities for Year 1	⊙	⊙	⊙	

* Customized survey for students in Grades 3-12; optional service

* Customized survey of stakeholders (e.g., teachers, staff, admin, parents, community)

Yakima School District | Proposed Strategic Planning Calendar

Tentative schedule pending finalization with client; dates not firm commitment until after formal contract

Date	Team/Focus	
August-early September	Off-site prep by Performance Fact Team	<ul style="list-style-type: none"> (Off-site) Review of recent community assessments, surveys, other existing locally available data/information
August-early September	C&I / Educational Services	<ul style="list-style-type: none"> Data-gathering and analysis (student data and professional practices)
Sept 16	C&I / Educational Services	<ul style="list-style-type: none"> Assessment of current state of standards-aligned instruction and educational programs
Sept 16	Student Voice (Focus Groups)	<ul style="list-style-type: none"> Conversations with diverse cross-section of students; one group per level – elementary, middle, high school; 1 approx. 60-75-minute per session.
Sept 16	Board Check-in	<ul style="list-style-type: none"> Intro session with the Board (preview to full-day on Sep. 17)
Sept 17	Board full-day session	<ul style="list-style-type: none"> Full-day Board workshop regarding <i>Profile of a Graduate; Vision, Mission, Core Values</i>
Sept 23-24	Core Planning Team/IF Team – Session #1	<ul style="list-style-type: none"> Representatives of <u>all</u> community stakeholder groups (2-day session); full-day sessions
Sept 23 <u>or</u> 24	Alignment Team – Session #1	<ul style="list-style-type: none"> Community leaders and opinion-shapers (from multiple sectors); approx. 1-hour session
Sept 23	Board Check-in	<ul style="list-style-type: none"> Board status report and/or workshop regarding <i>Profile of a Graduate; Vision, Mission, Core Values</i>
Oct 14-15	Core Planning Team/IF Team – Session #2	<ul style="list-style-type: none"> Representatives of <u>all</u> community stakeholder groups (2-day session); full-day sessions
Oct 14 <u>or</u> 15	Alignment Team – Session #2	<ul style="list-style-type: none"> Community leaders and opinion-shapers (from multiple sectors), approx. 1-hour session
Oct 14	Board Check-in	<ul style="list-style-type: none"> Board status report and/or workshop regarding <i>Profile of a Graduate; Vision, Mission, Core Values</i> [if no conflict with evening Community Forum]
Oct 14	Community Forum #1	<ul style="list-style-type: none"> "Reality check" session with community stakeholders; evening event open to <u>all</u>; review <u>all</u> activities to-date: <i>Strategic Plan, Profile, Vision/Mission/Core Values</i>
Oct 15	Community Forum #2	<ul style="list-style-type: none"> "Reality check" session with community stakeholders; evening event open to <u>all</u>; review <u>all</u> activities to-date: <i>Strategic Plan, Profile, Vision/Mission/Core Values</i>
Oct 23-Nov 13	School/ Department "Reality Check"	<ul style="list-style-type: none"> "Reality check" of draft strategic plan by staff of <u>each</u> school & <u>each</u> Department; co-facilitated by planning team members; also, to Community Groups
Nov 18	Core Planning Team/IF Team – Session #3	<ul style="list-style-type: none"> Representatives of <u>all</u> community stakeholder groups; full-day session
Nov 18	Alignment Team – Session #3	<ul style="list-style-type: none"> Community leaders and opinion-shapers (from multiple sectors); approx. 1-hour session
Nov 18	Board Update/Check In	<ul style="list-style-type: none"> Update board on progress to date [Note: Could also be extended to include work session regarding <i>Graduate Profile</i> and to wrap up <i>Vision/Mission/Core Values</i>]
Late Nov-Early Dec 2019	Strategic Plan compilation (mostly off-site work)	<ul style="list-style-type: none"> (Off-site) Successive drafts of the Strategic Plan; periodically reviewed with stakeholders, as appropriate
Dec 9	Core Planning Team/IF Team – Session #4 (Rollout of Draft Plan)	<ul style="list-style-type: none"> Half-day session; review of first complete draft of Strategic Plan
Dec 9	Alignment Team – Session #4	<ul style="list-style-type: none"> Review of first complete draft of Strategic Plan
Dec 9	Board Update/Check In	<ul style="list-style-type: none"> Update board on progress to date
Jan 13	Formal Board Approval of Strategic Plan	<ul style="list-style-type: none"> Submission of Final Report/Formal Board Approval (Note: Periodic check-in and status updates to Board and Cabinet throughout the process)

Form **W-9**
(Rev. December 2014)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

**Give Form to the
requester. Do not
send to the IRS.**

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
PERFORMANCE FACT, INC.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification; check only **one** of the following seven boxes:
☐ Individual/sole proprietor or single-member LLC
☒ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate
☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____
Note. For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner.
☐ Other (see instructions) ▶ _____

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):
 Exempt payee code (if any) _____
 Exemption from FATCA reporting code (if any) _____
 (Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.)
333 HEGENBERGER RD STE 204

6 City, state, and ZIP code
OAKLAND, CALIFORNIA 94621

7 List account number(s) here (optional)

Requester's name and address (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note. If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

Social security number

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or

Employer identification number

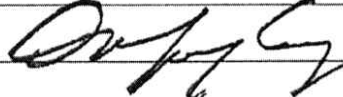
1	6	-	1	5	3	8	3	2	1
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Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

Sign Here Signature of U.S. person ▶  Date ▶ **JULY 17, 2019**

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at www.irs.gov/fw9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)

- Form 1096 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding?* on page 2.

By signing the filled-out form, you:

- Certify that the TIN you are giving is correct (or you are waiting for a number to be issued).
- Certify that you are not subject to backup withholding, or
- Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
- Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting?* on page 2 for further information.