



SERVICE AGREEMENT Facilitator for Team Lee's Summit

R-20/21-22

This agreement made and entered into this 21st day of May 2021, by and between the Lee's Summit R-7 School District, herein after referred to as the "District". The District is awarding the following contract to **Key Concepts LLC.**, hereafter referred to as "Service Provider", Witnessed, that:

Whereas, Service Provider has offered to provide the services, payment terms and insurance requirements, subject to the General Conditions described in Exhibit A and

Whereas, the District desires to engage Service Provider to perform such services. District staff reserves the right to choose provider(s) in any combination that best suits their needs.

Now, therefore, in consideration of the mutual covenants and considerations herein contained, it is hereby agreed by the parties hereto as follows:

1. District employs Service Provider to perform the services hereinafter set forth.
2. Services: Service Provider represents that it is equipped, competent and able to perform, and that it will perform all services hereinafter set forth in a diligent, competent and workmanlike manner. Service Provider will perform all such services in accordance with the following provisions, incorporated into this Agreement as if set forth in full herein: the Service Provider's Proposal, ("Proposal"); Scope of Services ("Scope"); Pricing; Payment Terms; Insurance Requirements and General Terms and Conditions, attached hereto as Exhibit A.
3. The term of this Agreement shall commence on July 1st, 2021 and expire on June 30th, 2024. Prices shall remain firm for the initial term of this contract. The District may, at its option, renew the Contract for up to three (3) additional one-year contract periods by giving written notice to the supplier.
4. This Contract may be terminated by either party upon thirty (30) days prior notice in writing to the other party. The District may terminate this contract immediately, under breach of contract, if the Service Provider fails to perform in accordance with the terms and conditions as referenced to and incorporated above.
5. This Agreement shall be binding on the parties thereto only after it has been duly executed and approved by the District and the Service Provider.

Lee's Summit R-7 School District:

Key Concepts, LLC.:

Christa Battaglia
Title: Purch & Dist Coordinator Date May 6, 2021

Shane Jersch 5-4-2021
Title: Date



R-20/21-22
Key Concepts, L.L.C.
Supplier Response

Event Information

Number: R-20/21-22
Title: Facilitator Services for Team Lee's Summit
Type: Request for Proposal
Issue Date: 3/23/2021
Deadline: 4/15/2021 01:00 PM (CT)
Notes: The Lee's Summit R-7 School District is soliciting proposals for Facilitator Services for Team Lee's Summit. The purpose of TEAM Lee's Summit is to provide the best possible work environment for each Lee's Summit R-7 employee. This is accomplished by providing open, on-going, two-way communication regarding salary, benefits, and quality of work life issues for all Lee's Summit R-7 employee groups. Toward that end, TEAM Lee's Summit utilizes data to identify areas for improvement and formulate recommendations to address the following: work environment, benefit package and salaries. Lee's Summit R-7 School District (or the "District") is requiring proposers to submit their proposals electronically. Electronic submission help eliminate errors, eliminate unnecessary work, and is more friendly to the environment. Lee's Summit R-7 School District will not accept proposals that are submitted via email or fax machine. The District reserves the right to accept or reject any and all proposals and to waive any formalities or technicalities if deemed in the best interest of the District. It is the responsibility of all responders to review the entire proposal, seek clarification of any item or requirement that may not be clear, and check all responses for accuracy before submitting a response.

If you are having difficulty submitting electronically, please contact

Heather Falls at 816-986-2195 or email heather.falls@lsr7.net for instructions.

It is the responsibility of interested firms to check <https://lsl7ebid.ionwave.net> for any addendums or notices of information prior to the opening date and time of this RFP.

Contact Information

Contact: Heather Falls
Address: Purchasing
702 SE 291 Highway
Lee's Summit, MO 64063-4306

Key Concepts, L.L.C. Information

Contact: Thomas Jacobson
Address: 11725 Arbor Street
Suite 220
Omaha, NE 68144
Phone: (402) 991-7252
Fax: (402) 991-7168
Email: info@keycepts.com

By submitting your response, you certify that you are authorized to represent and bind your company.

Thomas Jacobson

Signature

Submitted at 4/14/2021 11:25:02 AM

info@keycepts.com

Email

Response Attachments

Sclair-Stein J- Resume 2021 04.pdf

Response to Item #43--Resume of Key Personnel

Certificate.pdf

Required Insurance Certificate

Supplier Information.pdf

Supplier Information

Everify form.pdf

Everify form

Additional References.pdf

Additional References

Bid Attributes

1 Introduction

The Lee's Summit R-7 School District is soliciting proposals for Facilitator Services for Team Lee's Summit. The purpose of TEAM Lee's Summit is to provide the best possible work environment for each Lee's Summit R-7 employee. This is accomplished by providing open, on-going, two-way communication regarding salary, benefits, and quality of work life issues for all Lee's Summit R-7 employee groups. Toward that end, TEAM Lee's Summit utilizes data to identify areas for improvement and formulate recommendations to address the following: work environment, benefit package and salaries. Lee's Summit R-7 School District (or the "District") is requiring proposers to submit their proposals electronically. Electronic submission help eliminate errors, eliminate unnecessary work, and is more friendly to the environment. Lee's Summit R-7 School District will not accept proposals that are submitted via email or fax machine. The District reserves the right to accept or reject any and all proposals and to waive any formalities or technicalities if deemed in the best interest of the District. It is the responsibility of all responders to review the entire proposal, seek clarification of any item or requirement that may not be clear, and check all responses for accuracy before submitting a response.

The TEAM shall consist of five teachers, five classified employees, three district level administrators, two school principals and one or two members of the Board of Education. Discussion sessions will be closed except to TEAM Lee's Summit membership.

2 Instructions to Respondents

1. All questions regarding this RFP shall be submitted online via the "Questions" tab of this bid opportunity. The District reserves the right to reject any and all proposals, to waive technical defects in proposals, and to select the proposal(s) deemed most advantageous to the District.
2. It is the responsibility of each respondent before submitting a proposal to examine the documents thoroughly and request written interpretation or clarifications soon after discovering any conflicts, ambiguities, errors, or omissions in the proposal documents. Requests for clarification must be submitted online via the "Questions" tab.
3. Changes to the specifications will not be allowed except by written addendum issued by the District through the online procurement system. Oral explanations or instructions given prior to award will not be binding.
4. Respondent shall quote net costs of all goods and services requested and all quotes shall include all transportation to destination and inside delivery.
5. There will be no public opening of the proposals.
6. Acceptance of this proposal or any part thereof, in writing, within ninety (90) days after the closing date, by the District shall constitute a legal and binding agreement; wherein, the vendor shall furnish the services in accordance with the specifications and offeror's proposal on the written order of the District.
7. The District reserves the right to award this contract in its entirety or to split the contract among bidders, whichever is in the best interest of the District. The District may accept any item or group of items of the bid unless qualified by specific limitation of the bidder.
8. To be considered, a firm must have at least three (3) proven clients of similar size to our district.

I have read and understand.

3 SELECTION PROCESS

The proposals will be evaluated by a District Selection Committee (DSC) comprised of selected District personnel. The overall process may consist of two steps: the first being a review and evaluation of all responsive proposals and the second being the interview phase for the short list of respondents selected for interview, if applicable.

Step One: Evaluation of Proposals

Members of the DSC will review and rate each responsive proposal based on the following criteria:

- a. The firm's experience in providing similar services to school districts or governmental agencies during the past five (5) years.
- b. Key personnel that will be assigned to the District's project, and their experience with similar projects.
- c. Applicable resources offering quality assurances/quality control procedures; as well as adequacy of team/resources to complete the project within the proposed time-frame.
- d. Project approach including project schedule and detailed approach to complete this project, familiarity with this project, identification of unique issues related to project, and the process proposed for communications with District staff.
- e. Cost

Step Two: Interviews (If Deemed Necessary)

The Proposal Ranking Sheet for the evaluation of the proposals is included in this RFP. The DSC may request additional submittals.

4 Responding to Attributes

There are attributes, including this one, associated with this proposal. Some are notes and require no response, but most have a required response. **Please select each page from the bottom right-hand side of this list of attributes in order to view the next page of Bid Attributes.**

5 Attachments Required

Be sure to upload all required documents and forms to the "Response Attachments" Tab.

6 Purchase Agreements

Purchase Agreements shall be awarded in accordance with regulations adopted by the Lee's Summit R7 Board of Education and adhere to all applicable purchasing policies. Purchase Agreements will be negotiated with the lowest responsible bidder who meets the qualifications for quality, price, terms of bid, lead time, and determined to be in the best interest of the District. The bid award will be at the sole discretion of the District. The District reserves the right to reject any and all bids in part or in whole, and to accept the bid that is in the best interest of the District.

I have read and understand.

7 Terms of This Bid

The terms of this bid shall remain in effect for at least one year from date of award. All prices MUST remain firm during that time period. The District may make additional purchases at the itemized price listed in the bid packet for a period of one (1) year. The District may, at its option, renew the Contract for up to three (3) additional one-year contract periods by giving written notice to the supplier.

I have read and understand.

8 Bid Pricing

After the first year, the vendor may submit a price adjustments to the District based on a Manufacturer's Revised Published Price List. The request MUST contain a written notification from the manufacturer to the supplier or vendor of price increases. The Revised Published Price List or manufacturer's notification shall be submitted to the District at least thirty (30) calendar days prior to the effective date of the new price to be charged to the District. It shall be understood that such price adjustments shall not exceed the amount passed onto the supplier or vendor by the manufacturer. It shall be further understood that the District reserves the right to reject any price adjustments submitted by the bidder and/or to terminate the contract with the bidder based on such price adjustments.

The successful bidder(s) must agree to accept the District's Purchase Order or the District's Mastercard P-card for the work order. These purchases are tax exempt.

The Lee's Summit R7 School District will review all bid submissions with regards to pricing, product performance, equipment features, references and experience. The District plans to award the bid within 60 days after the bid opening.

I have read and understand.

9 Communications Statement

Communications: Contact between vendors and Lee's Summit R7 personnel during the proposal process or evaluation process is prohibited. Any attempt by vendors during the proposal process to contact Lee's Summit R7 personnel may result in disqualification. All communication shall go through the Purchasing and Contracts Department during this competitive process. All questions received and the corresponding answers will be distributed to all bidders. No verbal responses will be provided. The deadline for questions about this proposal is stated in the Bid Activities and the district will not respond to questions after this time and date. Response to questions will be posted in the form of an addendum to this proposal. The vendors will be responsible for checking the website for any posted addenda.

I have read and understand.

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0 **General Terms and Conditions**

I have downloaded and read the General Terms and Conditions from the ATTACHMENTS tab. By selecting this box, I agree to to the terms and conditions.

I have read and agreed to the T&C

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1 **Proposal Requirement**

PROPOSAL REQUIREMENTS

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2 **Scope**

SCOPE: The District employees nearly 3,000 full time staff within seven different municipalities. The District provides public education to approximately 18,500 students and oversees 34 separate facilities. The purpose of this team is to provide the best possible work environment for each Lee’s Summit R-7 staff member, by providing open, fair, on-going, two-way communication regarding salary, benefits and quality of work life issues for all Lee’s Summit R-7 staff groups.

1. Objectives:

- The District is seeking a service provider to facilitate discussion of approximately seven (7) on-site meetings with TEAM Lee’s Summit in conjunction with the Assistant Superintendent of Human Resources throughout the school year.
- Service provider shall work with TEAM LS staff to develop consensus driven recommendations for consideration by the Superintendent of schools.

2. Requirements:

- The service provider must have experience facilitating other groups in a similar agency or other entity.
- The service provider must demonstrate strong communication skills with large groups and individuals.
- The service provider must possess strong leadership and organization skills.

3. Tasks:

- Develop agendas for all meetings with the TEAM.
- Meet with district staff prior to each meeting.
- Assist the TEAM in development of consensus driven recommendations.
- Coordinate training for all TEAM members at the start of the year to promote trust and lateral thinking throughout the TEAM.
- Work with and be a resource to TEAM Lee’s Summit, Business Services and Human Resources.
- Assist in developing a team environment that results in a high functioning, effective work team.
- Additional meetings as needed or requested by the Assistant Superintendent of Human Resources or the Team.

SPECIFICATIONS:

1. Response time criteria:

Under this contract, it is required that the service provider be available during normal business hours of Monday thru Friday, 8:00 am to 5:00 pm. It is estimated that the service provider shall facilitate on-site meetings approximately seven (7) times per year, from September to May during the school year as determined by the district.

Service provider shall report to the Executive Director of Human Resources and the Assistant Superintendent of Human Resources.

Failure to deliver services in accordance with this contract and the contract terms and conditions, may result in the District, after due oral or written notice, contacting another service provider and requesting the work be performed by them. In this circumstance, the service provider shall not be entitled to any payment or damages and shall pay the District for any additional costs incurred. Failure to respond or report to the site within the agreed time frame, may be construed as a breach of this contract, and at the District’s discretion, this contract may be terminated upon written notice by the District.

2. Post award information:

The service provider shall be responsible for providing, maintaining and transporting all necessary and customary equipment and tools needed to fulfill the contract. In no event shall the District be responsible for any damages to any of the service provider's equipment damaged, destroyed or stolen.

Independent Vendor: The relationship of the service provider to the District shall be that of an independent vendor. Neither the service provider nor any of its employees shall be held or deemed in any way to be an agent, employee or official of the District.

Assignment and Subcontracting: The service provider shall not assign or subcontract the work, or any part thereof, without the previous written consent of the District.

3. Right of Owner to Terminate Contract:

The District, upon written notice, may terminate this contract, or any part thereof, as a result of the service provider's failure to render to the satisfaction of the District, the material, work and/or services required of it, including progress of the work and such abandonment or termination shall not be deemed a breach by the District. The District shall be the sole determinant in all termination for cause issues. The service provider shall not be entitled, nor shall the District give any consideration to claims for this contract, or any part hereof, by the District for cause. Such termination may come about for the sole convenience of the District. Upon receipt of written notification from the District that this contract or any part hereof, is to be terminated, the service provider shall immediately cease operation of the work stipulated. The service provider and District's evaluation shall be entitled to just and equitable payment in accordance with this contract for any uncompensated work satisfactorily performed prior to such notice.

I have read and understand.

1 3 **SPECIFIC REQUIREMENTS OF RFP:**

1. Purchase Agreements shall be awarded in accordance with regulations adopted by the Lee's Summit R7 Board of Education and adhere to all applicable purchasing policies. Purchase Agreements will be negotiated with the lowest responsible bidder who meets the qualifications for quality, price, terms of bid, and service, and determined to be in the best interest of the District. The RFP award will be at the sole discretion of the District. The District reserves the right to reject any and all bids in part or in whole, and to accept the proposal that is in the best interest of the District.
2. Licenses and Permits: The successful respondent shall secure licenses imposed by law and ordinance and pay all charges and fees, which shall include a current City of Lee's Summit, MO, business license. Before issuance of a contract to the successful respondent, proof of the licenses (i.e. xerographic copy of the paid receipt or xerographic copy of the actual license) shall be provided to the Purchasing Department to be kept in the file as part of the permanent record. It shall be the responsibility of the successful respondent to contact the Treasury Division of the City of Lee's Summit at 816-969-1125, for information to obtain business licenses.

1 4 **Schedule of RFP Process**

Timeline for RFP Process:

The timeline listed below is the District's estimation of time required to complete the RFP process. All efforts shall be made to abide by this schedule; however, it is subject to change due to different circumstances.

- RFP Notification 3/23/2021
- Receive Proposals 4/15/2021
- School Board 5/20/2021
- Notice to Proceed 7/1/2021

The District desires the execution of the contract to meet the following dates: Services need to begin after 6/30/2021.

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No Deviations or Exceptions

Bidders are expected to bid on the items as listed on the Equipment Specifications List, or Scope of Work. If there are any deviations from the specifications or scope of work listed, the bidder is expected to make note, along with a brief description in the next below. The District reserves the right to determine the successful bidder and will make that decision based on the best interest of the District.

I have read and agree.

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Deviations and Exceptions

If your company intends to deviate from the Specifications listed in the attached documents, all such deviations and exceptions must be listed here, with complete and detailed conditions and information included. The District will consider any deviations or exceptions in its bid award decisions. The District reserves the right to accept or reject any proposals based upon any deviations indicated below.

If none, please enter N/A (Not Applicable).

N/A

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Cooperative Procurement with Other Jurisdictions

This section is optional; it will not affect the agreement.

1) Sales will be made in accordance with the prices, terms, and conditions of the Request for Proposals and any subsequent term agreement.

2) There shall, however, be no obligation under the cooperative procurement agreement for any organization represented by MACPP or MARC to utilize the proposal or agreement unless they are specifically named in the Request or Proposals as a joint respondent.

3) All sales to other jurisdictions will be made on purchase orders issued by that jurisdiction. All receiving, inspection payments and other agreement administration will be the responsibility of the ordering jurisdiction.

4) Each jurisdiction that is a party to the joint proposal has authority to act as Administrative Contracting Officer with responsibility to issue purchase orders, inspect and receive goods, make payments and handle disputes involving shipment to the jurisdiction.

If the District awarded you the proposed agreement, would you sell under the prices and terms of this agreement to any public school district or any other non-profit organization having membership in the Mid-America Council of Public Purchasing (MACPP) or Mid-America Regional Council (MARC) and located within the greater Kansas City metropolitan trade area? (All deliveries shall be F.O.B. Destination and there shall be no obligations on the part of any member of said Council to utilize this agreement).

No

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Consultant Profile

CONSULTANT PROFILE

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Lead Consultant Name

Enter the Lead Consultant Firm(s) (or Joint Venture) name.

Key Concepts, L.L.C.

20	Lead Consultant Address Enter the Lead Consultant Firm(s) (or Joint Venture) address. street city, state zip
	11725 Arbor Street, Suite 220 Omaha, NE 68144

21	Lead Consultant Provider Please designate the service area provided by the lead consultant.
	National

22	Year Provider Firm Established Please enter the year the provider's firm was established.
	1996

23	Years of Experience Please enter the number of years of experience providing this service.
	25

24	Licensed in Missouri Are you licensed to do business in the State of Missouri?
	Yes

25	Principal Contact Please provide name, title, telephone number and email address of Principal contact
	Dr. Judy Sclair-Stein Lead Consultant 314-809-9714 j_sclair-stein@macnjake.com

26	Address of Office to Perform Work Please provide address of office to perform work if different than Lead Consultant Firm address.
	1538 Woodroyal West Dr. Chesterfield, MO 63017

27	Number of Persons Committed to District's Project Please list the number of persons by discipline that your Firm/Joint Venture will commit to the District's project
	1

28	Joint Venture Areas of Responsibility If submittal is by Joint Venture or utilizes subcontractors, list participating firms/providers and outline specific areas of responsibility (including administrative and technical) for each firm.
	N/A

29	Has This Joint Venture Previously Worked Together? Has This Joint Venture Previously Worked Together?
	No response

30	<p>Key Outside Consultants</p> <p style="text-align: center;">Key Outside Consultants</p> <p>N/A</p>
31	<p>Subcontractor #1 Name</p> <p>Please provide name of Subcontractor.</p> <p>N/A</p>
32	<p>Subcontractor #1 Address</p> <p>Please provide address of Subcontractor.</p> <p>N/A</p>
33	<p>Specialty/Role with this Project</p> <p>Provide Subcontractors Specialty/Role with this Project.</p> <p>N/A</p>
34	<p>Worked with Lead Firm Before?</p> <p>Worked with Lead Firm Before?</p> <p><i>No response</i></p>
35	<p>Year Firm Established</p> <p>Year Firm Established</p> <p><i>No response</i></p>
36	<p>Years of Experience</p> <p>Please provide number of years experience providing this service.</p> <p><i>No response</i></p>
37	<p>Subcontractor #2 Name</p> <p>Please provide name of subcontractor #2.</p> <p>N/A</p>
38	<p>Subcontractor #2 Address</p> <p>Please provide address of subcontractor #2</p> <p>N/A</p>
39	<p>Specialty/Role with this Project</p> <p>Please provide subcontractors specialty/role with this project</p> <p>N/A</p>
40	<p>Worked with Lead Firm Before?</p> <p>Has this Subcontractor worked with the lead firm before?</p> <p><i>No response</i></p>
41	<p>Year Firm Established</p> <p>Please provide year Subcontractors firm was established.</p> <p><i>No response</i></p>

4 2	<p>Years of Experience</p> <p>Please provide subcontractors number of years of experience.</p> <p><input type="text" value="No response"/></p>
4 3	<p>Resume of Key Personnel</p> <p style="text-align: center;">Resume of Key Personnel</p> <p><input type="text" value="Attached as separate document"/></p>
4 4	<p>Name of Key Personnel</p> <p>Provide name of key persons, specialists, or certified staff that shall be assigned to the District's project.</p> <p><input type="text" value="Dr. Judy Sclair-Stein"/></p>
4 5	<p>Title of Key Personnel</p> <p>Provide job title of key personnel assigned to District's project.</p> <p><input type="text" value="Consultant"/></p>
4 6	<p>Assignment</p> <p>Experience of Key Personnel: Provide previous or current assignment of key personnel related to this service.</p> <p><input type="text" value="Dr. Judy Sclair-Stein has served as the Facilitator of Team Lee's Summit since January of 2021. Sclair-Stein has been an educator for over thirty-nine years. Dr. Sclair-Stein was the Acting Superintendent and the Assistant Superintendent for Human Resources in the Ladue School District in suburban St. Louis, Missouri. She retired from Ladue in 2013. Prior to that she was the Assistant Superintendent for Human Resources in the School District of University City, also in St. Louis. Dr. Sclair-Stein was a building principal at the elementary and middle school levels for seventeen years in three different districts: Highland Park, Illinois; Pattonville and Webster Groves, both in St. Louis. Prior to becoming a principal, Sclair-Stein taught 5th and 6th grades and middle school speech and drama."/> <input type="text" value="Sclair-Stein serves as a consultant and conducts superintendent searches for districts in Missouri and around the country; in fact she led the search for the Lee's Summit superintendent, when Dr. Buck was hired. Dr. Sclair-Stein also does other consulting, working with schools and school districts to support their needs in a variety of areas."/> <input type="text" value="Dr. Sclair-Stein is an adjunct professor at Lindenwood University, where she currently supervises graduate students studying to become school guidance counselors. She has also taught School Human Resources and mentored aspiring administrators."/> <input type="text" value="Dr. Sclair-Stein possesses a Bachelor's degree in Elementary Education and Speech and Drama from the University of Missouri, Columbia; a Master's degree and an Educational Specialist's degree, (both in Educational Leadership) from Truman University in Kirksville, Missouri; and a Doctorate in Education—Educational Leadership, from St. Louis University."/></p>
4 7	<p>Name of Firm with which Associated</p> <p>Experience of Key Personnel: Provide name of firm which assignment was/is associated with.</p> <p><input type="text" value="Key Concepts, L.L.C."/></p>
4 8	<p>Years of Experience with this Firm</p> <p>Please provide assigned key personnel's experience with this firm.</p> <p><input type="text" value="6"/></p>
4 9	<p>Years of Experience with Other Firms</p> <p>Please provide assigned key personnel's experience with other firms.</p> <p><input type="text" value="4"/></p>

50	Education Degree(s) or Certification(s)/Year/Specialization <hr/> Ed.D. 2000 St. Louis University Educational Leadership Ed.S. 1988 Truman University Educational Leadership M.A.Ed. 1986 Truman University Educational Leadership B.S.Ed. 1981 University of Missouri Elementary Education & Middle School Speech & Drama
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51	Current Registration(s) Please provide current registration(s) <hr/> <i>No response</i>
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52	Other Experience & Qualifications Please provide other Experience & Qualifications relevant to the proposed project <hr/> <i>No response</i>
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53	Project Narrative Use this space to provide a detailed project approach OR upload a response in the response attachments section. Including but not limited to: <ul style="list-style-type: none"> • Schedule and detailed approach is reasonable/responsive to District’s needs • Describe Services offered • Identify any and all proven techniques used • Roles of all involved parties clearly identified • Familiarity with project location as evidenced by proposal/interview (if applicable) • Identify/recognize critical or unique issues specific to the project and unique approaches used elsewhere • Proposed timeline for implementation of contract • Proposed communication process <hr/> <p>Dr. Buck and Dr. Delsemme reached out to Dr. Judy Sclair-Stein in the late fall of 2020, to see if she would have interest in stepping into the role of Facilitator of Team Lee’s Summit for the remainder of the 2020-2021 school year. Both Dr.’s Buck and Delsemme had familiarity with Dr. Sclair-Stein’s work, as she had led the superintendent search when Dr. Buck was hired and had also lead professional development and training with the Board of Education during the summer of 2020. Feeling that Dr. Sclair-Stein had the professional background, experience, expertise and demeanor necessary, they approached her to see if she would be willing to take over the leadership role as facilitator of Team Lee’s Summit when the previous facilitator had to step down.</p> <p>After researching the opportunity through questions and conversations with Dr.’s Buck and Delsemme and others, as well as other learning Dr. Sclair-Stein undertook, she decided to step into this role.</p> <p>Since January of 2021, Dr. Sclair-Stein has been working with the team. The transition was fairly seamless and the team has been responsive to Dr. Sclair-Stein’s leadership style. Dr. Sclair-Stein worked closely with Dr. Delsemme to review the agenda prior to each session and to familiarize herself with the topics for the day. One of the things Dr. Sclair-Stein instituted was a time allotment for each item on the agenda. While the time allotment was not carved in stone, it aided the team in being efficient and moving forward with their work. (One of the things communicated to Dr. Sclair-Stein prior to her beginning with the team, was that staying on track and using time wisely was an area for growth.) Additionally, Dr. Sclair-Stein strived to make each session engaging for everyone and began each session with some type of activity which helped to serve as an ice breaker; the starting activity was always built around a theme tied to the day’s work.</p>
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Throughout the course of the day, Dr. Sclair-Stein listened actively to the discussion, stepping in to rephrase or clarify as necessary; she tried to always keep the group on track and on-focus and adjusted the agenda as was needed. Listening to the team members, seeking their contributions, sharing ideas, respecting their process and working with them to continue to grow and develop were all strategies she employed.

If selected to continue in this role, a small sub-group of the team and Dr. Sclair-Stein plan to look at the survey to see if it needs some refinement in terms of how the questions are phrased so as to make them clearer for respondents. (The group spent a great deal of time trying to interpret responses to a few of the questions, which led to a discussion that would be a good time to revisit, refine and update the survey instrument itself.)

Each session with the team was always concluded with a closing activity for the team to assess how the day had gone and to bring the work full circle. The members of Team Lee's Summit for 2020-2021 worked very collaboratively together; they were respectful of each other, they sincerely cared about each other as people and had regard for each other's job responsibilities.

Should she be selected to continue as the Facilitator of Team Lee's Summit resuming in the 2021-2022 school year, it would be Dr. Sclair-Stein's intent to lead in a similar manner as described here, while always striving to grow and develop her skills and approach. Dr. Sclair-Stein is the kind of leader who asks for constructive feedback and has done so with the team on several occasions; she will continue to do that, in order to serve their needs and to be the most effective facilitator she can be. It would be Dr. Sclair-Stein's honor to continue in this role.

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4 **PROPOSAL SCORING CRITERIA**

PROPOSAL SCORING CRITERIA

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5 **Evidence of Experience & References with Similar Accounts (Ref & Exp)**
Evaluation Criteria

Evidence of Experience & References with Similar Accounts (Ref & Exp)

The District will review and evaluate any/all proposals for the references and experience with similar sized school districts indicated in the document.

- Familiarity and experience with similar projects.
- Consider the number of years of experience the firm/provider has with similar sized schools/businesses.
- Consider the number of years the firm has been in business.
- Consider the references given by the firm/provider.

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6 **Approach and Understanding of Scope**
Evaluation Criteria

Approach and Understanding of Scope

Evaluate the provider's approach to and understanding of the scope of services required in the RFP as evidenced by the vendor's proposal:

- Detailed approach is reasonable /responsive to District's needs.
- Familiarity with project locations as evidenced by proposal.
- Identify/recognize critical or unique issues specific to the project.
- Unique approaches that have been successful elsewhere.
- Provide literature outlining plan for implementation and training.

5 7	Cost Evaluation Criteria Cost The District will review and evaluate any/all proposals on a per hour bases. The District will also review any other addec expenses listed for additional materials, mileages, etc.
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5 8	REFERENCES REFERENCES
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5 9	How many years has your company been in business? <input type="text" value="25"/>
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6 0	References List multiple references and prior experience; preferably with other school districts or governmental agencies, in the last 3 – 5 year period; work or services in the same type and size to the project being proposed. Please list the following information for each school district:
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6 1	Reference 1 Reference 1
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6 2	Reference #1 Contact Person's Name <input type="text" value="Dr. Heather Kenney"/>
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6 3	Reference #1 - Contact Person's School District/Business <input type="text" value="Principal, Summit Point Elementary, Lee's Summit R-7 School District"/>
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6 4	Reference #1 Address Enter Street address, city, state, zip code <input type="text" value="13100 E. 147th Street, Kansas City, MO 64149"/>
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6 5	Reference #1 Phone Number <input type="text" value="(816) 986-4210"/>
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6 6	Reference #1 Email <input type="text" value="heather.kenney@lsr7.net"/>
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6 7	Reference #1: Description of services performed and completion date Describe the services performed and completion date of project. <input type="text" value="TEAM Lee's Summit--January-April 2021"/>
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6 8	Reference 2 Reference 2
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6 9	Reference #2 - Contact Person's Name <input type="text" value="Ms. Patti Ray"/>
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7 0	Reference #2 - Contact Person's School District/Business BASS Program Manager, Lee's Summit R-7 School District
7 1	Reference #2 Address: Street, City, State, Zip Code 301 N.E. Tutor Road, Lee's Summit, MO 64086
7 2	Reference #2 Phone Number (816) 986-3440
7 3	Reference #2 Email patti.ray@lsr7.net
7 4	Reference #2: Description of services performed and completion date Describe the services performed and completion date of project. TEAM Lee's Summit--January-April 2021
7 5	Reference #3 Reference #3
7 6	Reference #3 Contact Person's Name Mr. Nate Smith
7 7	Reference #3 - Contact Person's School District/Business Teacher, Lee's Summit High School, Lee's Summit R-7 School District
7 8	Reference #3 Address: Street, City, State, Zip Code 400 SW Blue Parkway, Lee's Summit, MO 64063
7 9	Reference #3 Phone Number (816) 916-2000
8 0	Reference #3 Email nate.smith@lsr7.net
8 1	Reference #3: Description of services performed and completion date Describe the services performed and completion date of project. TEAM Lee's Summit--January-April 2021

8
2 **Additional References**

Additional reference information can be submitted as document. The document can be uploaded to the "Response Attachments" tab within the bid event.

Be sure to include the following information:

- Reference Contact Name
- Reference contact's school district/business
- Reference address (street, city, state, zip)
- Reference phone number
- Reference email address
- Description of services performed and completion date

Bid Lines

1	Facilitation of TEAM Lee's Summit meetings and meetings with Business Services and Human Resources prior to TEAM meetings (hourly). Price: <input type="text" value="\$188.00"/> Total: <input type="text" value="\$188.00"/> Item Notes: Please provide hourly rate. Supplier Notes: <input type="text" value="Initial estimate of time required is six (6) meetings (8 hours each) during the 2021-2022 school year."/> <hr/> <hr/>
2	Travel Per Diem Price: <input type="text" value="\$600.00"/> Total: <input type="text" value="\$600.00"/> Supplier Notes: <input type="text" value="Travel Per Diem is estimated at \$600 per trip to the district."/> <hr/> <hr/>
3	Development of Meeting Agendas (time and materials) Price: <input type="text" value="\$300.00"/> Total: <input type="text" value="\$300.00"/> Supplier Notes: <input type="text" value="Estimate is 1-2 hours (at \$188 per hour) for preparation for each meeting."/> <hr/> <hr/>
4	Miscellaneous costs as defined (please attach a separate sheet, if needed, to detail costs) Price: <input type="text" value="\$50.00"/> Total: <input type="text" value="\$50.00"/> Supplier Notes: <input type="text" value="Supplies for meetings is estimated at \$50 per meeting"/> <hr/> <hr/>

Response Total: \$1,138.00