

# JEFFERSON COUNTY PUBLIC SCHOOLS

## CONTRACT FOR THE PROCUREMENT OF PROFESSIONAL SERVICES

THIS CONTRACT FOR PROCUREMENT OF PROFESSIONAL SERVICES (hereinafter "Contract") is entered into between the JEFFERSON COUNTY BOARD OF EDUCATION (hereinafter "Board"), a political subdivision of the Commonwealth of Kentucky, with its principal place of business at 3332 Newburg Road, Louisville, Kentucky 40218 and KiZAN Technologies LLC (hereinafter "Contractor"), with its principal place of business at 1831 Williamson Ct, Ste K., Louisville Ky. 40223.

### WITNESSETH:

WHEREAS, the Board desires to procure the particular services of Contractor, which are more fully defined below; and

WHEREAS, Contractor has held itself out to be competent and capable of performing the services contracted for herein;

NOW, THEREFORE, in consideration of the mutual promises and agreements hereinafter set forth, the Board and Contractor (hereinafter "Parties") agree as follows:

### ARTICLE I

#### Entire Agreement; Amendments

This Contract is the entire agreement between the Parties and supersedes any and all agreements, representations and negotiations, either oral or written, between the Parties before the effective date of this Contract. This Contract may not be amended or modified except in writing as provided in Article VIII. This Contract is supplemented by the Board's Procurement Regulations currently in effect (hereinafter "Regulations") that are incorporated by reference into and made a part of this Contract. In the event of a conflict between any provision of this Contract and any provisions of the Regulations, the Regulations shall prevail.

### ARTICLE II

#### Services

Contractor agrees to perform the following services (hereinafter "Services") of a quality and in a manner that is within the highest standards of Contractor's profession or business. The Services are as follows:

KiZAN shall provide an electronic sign-in and sign-out solution that will reconcile attendance with registered attendees in JCPS pdCentral for the 2019 Equity Institute and Deeper Learning Symposium. The fees are as follows:

1. Projection Manager \$140.00/hour

2. Senior Consultant \$165.00/hour

KiZAN Statement of Work for the Equity Institute and Deeper Learning Symposium is attached and incorporated herein by reference.

### ARTICLE III Compensation

The Board shall pay Contractor the total amount stated below (hereinafter “Contract Amount”). The Contract Amount shall be paid in a lump sum upon completion of the Services, unless a schedule of progress payments is stated below. The Contract Amount shall be for total performance of this Contract and includes all fees, costs and expenses incurred by Contractor including but not limited to labor, materials, taxes, profit, overhead, travel, insurance, subcontractor costs and other costs, unless otherwise stated below. To receive payment, Contractor must submit an itemized invoice or invoices. If progress payments are authorized, each invoice must specify the actual work performed. If payment of costs or expenses is authorized, receipts must be attached to the invoice.

Contract Amount:	<u>Not to exceed \$11,609.25</u>
Progress Payments (if not applicable, insert N/A):	<u>N/A</u>
Costs/Expenses (if not applicable insert N/A):	<u>N/A</u>
Fund Source:	<u>General fund</u>

### ARTICLE IV Term of Contract

Contractor shall begin performance of the Services on May 15, 2019 and shall complete the Services no later than June 13, 2019, unless this Contract is modified as provided in Article VIII.

### ARTICLE V Performance of Services by Contractor

The Services shall be performed by Contractor, and in no event shall Contractor subcontract with any other person to aid in the completion of the Services without the prior written approval of the Contract Administrator defined below.

Contractor shall appoint one person who shall be responsible for reporting to the Board on all Services performed under the terms of this Contract and who shall be available for consultation with the Contract Administrator.

Contractor is an independent contractor, not an employee. Contractor is responsible for the payment of all federal, state and local payroll taxes and providing unemployment insurance and workers compensation coverage to Contractor’s employees. Contractor shall provide all equipment, materials and supplies necessary for the performance of the Services.

Contractor shall at all times during the term of this Contract comply with all applicable laws, regulations, rules and policies. Contractor shall obtain and keep in force all licenses, permits and certificates necessary for the performance of the Services.



Contractor agrees to hold harmless, indemnify, and defend the Board and its members, agents, and employees from any and all claims or losses accruing or resulting from injury, damage, or death of any person, firm, or corporation, including the Contractor himself, in connection with the performance of this Contract. Contractor also agrees to hold harmless, indemnify, and defend the Board and its members, agents, and employees from any and all claims or losses incurred by any supplier, contractor, or subcontractor furnishing work, services, or materials to Contractor in connection with the performance of this Contract. This provision survives termination of this Contract.

Unless waived in writing by the Contract Administrator, Contractor shall maintain during the term of this Contract policies of primary insurance covering the following risks and in at least the following amounts: commercial general liability, including bodily injury, property damage, personal injury, products and completed operations, and contractual, \$1,000,000; and automobile liability, \$1,000,000. Contractor shall furnish to the Contract Administrator certificates of insurance evidencing this coverage and naming the Board as an additional insured. Additionally, Contractor shall maintain workers compensation coverage with limits required by law; and professional errors and omissions coverage with minimum limits of \$1,000,000. Contractor shall furnish certificates of insurance evidencing this coverage to the Contract Administrator.

#### ARTICLE VI Equal Opportunity

During the performance of this Contract, Contractor agrees that Contractor shall not discriminate against any employee, applicant or subcontractor because of race, color, national origin, age, religion, marital or parental status, political affiliations or beliefs, sex, sexual orientation, gender identity, gender expression, veteran status, genetic information, or disability. If the Contract Amount is paid from federal funds, this Contract is subject to Executive Order 11246 of September 24, 1965 and in such event the Equal Opportunity Clause set forth in 41 Code of Federal Regulations 60-1.4 is hereby incorporated by reference into this Contract as if set forth in full herein.

#### ARTICLE VII Prohibition of Conflicts of Interest

It shall be a breach of this Contract for Contractor to commit any act which is a violation of the provisions of Article XI of the Regulations entitled "Ethics and Standards of Conduct," or to assist or participate in or knowingly benefit from any act by any employee of the Board which is a violation of such provisions.

#### ARTICLE VIII Changes

The Board and Contractor may at any time, by mutual agreement set forth in a written addendum, make changes in the definition of the Services; the scope of the Services; and the Contract Amount. The Contract Administrator and Contractor may, at any time, by mutual agreement set forth in a written addendum, make changes in the time within which the Services are to be performed; the schedule of Progress Payments; and mutual Termination of the Contract.

## ARTICLE IX

### Termination for Convenience of the Board

The Board may terminate this Contract in whole or in part at any time by giving written notice to Contractor of such termination and specifying the effective date thereof, at least thirty (30) days before the specified effective date. The Board shall compensate Contractor for Services satisfactorily performed through the effective date of termination.

## ARTICLE X

### Termination for Default

The Board may, by written notice of default to Contractor, terminate the whole or any part of this Contract, if Contractor breaches any provision of this Contract, or so fails to make progress as to endanger performance of this Contract, and in either of these circumstances, does not cure the breach or failure within a period of five (5) days after receipt of notice specifying the breach or failure. In the event of termination for default, the Board may secure the required services from another contractor. If the cost to the Board exceeds the cost of obtaining the Services under this Contract, Contractor shall pay the additional cost. The rights and remedies of the Board provided in this Article shall not be exclusive and are in addition to any other rights and remedies provided by law or under this Contract.

## ARTICLE XI

### Disputes

Any differences or disagreements arising between the Parties concerning the rights or liabilities under this Contract, or any modifying instrument entered into under Article VIII of this Contract, shall be resolved through the procedures set out in the Regulations.

## ARTICLE XII

### Contractor's Work Product

Unless waived in writing by the Contract Administrator, the Board shall retain ownership in and the rights to any reports, research data, creative works, designs, recordings, graphical representations or other works of a similar nature (hereinafter "Works") produced or delivered by Contractor under this Contract. Contractor agrees that the Works are "works for hire" and Contractor assigns all right, title and interest in the Works to the Board.

Any reports, information, data, etc. given to or prepared or assembled by Contractor under this Contract shall not be made available to any individual or organization by Contractor without the prior written approval of the Board. Provided, nothing in this Article may be used to violate the provisions of any Kentucky or Federal statute or regulation which requires reporting of information.

## ARTICLE XIII

### Contract Administrator

The Board shall appoint a Contract Administrator for the purposes of daily administrative decision-making pertaining to the Contract. If Contractor and the Contract Administrator disagree on any circumstance or set of facts pertaining to the administration or execution of this Contract, the Board shall resolve the matter after notification by either the Contract Administrator or the Contractor in the manner prescribed by the Regulations. If the Board fails to give notice to Contractor of the



appointment of a Contract Administrator, the Contract Administrator shall be the Board's Chief Financial Officer.

#### ARTICLE XIV Right to Audit

The Board shall have the right to inspect and audit all accounting reports, books or records which concern the performance of the Services. Inspection shall take place during normal business hours at Contractor's place of business. Contractor shall retain all records relating to the performance of this Contract for five (5) years after the end of the term of this Contract.

#### ARTICLE XV Miscellaneous

- A. All Articles shall be construed as read, and no limitation shall be placed on any Article by virtue of its descriptive heading.
- B. Any notices or reports by one Party to the other Party under this Contract shall be made in writing, to the address shown in the first paragraph of this Contract, or to such other address as may be designated in writing by one Party to the other. Notices shall be effective when received if personally delivered, or three days after mailing if mailed.
- C. If any part of this Contract is held to be void, against public policy or illegal, the balance of this Contract shall continue to be valid and binding.
- D. This Contract shall be governed and construed in accordance with the laws of the Commonwealth of Kentucky.
- E. No delay or omission by either Party in exercising any right under this Contract shall operate as a waiver of that or any other right or prevent a similar subsequent act from constituting a violation of this Contract.
- F. At all times during the term of this Contract, Contractor shall comply with the Family Educational Rights and Privacy Act of 1974. If Contractor has access to student records, Contractor shall limit its employees' access to those records to persons for whom access is essential to perform this Contract.
- G. If this Contract requires Contractor and/or any employees of Contractor to perform services on the premises of any JCPS schools during JCPS school hours, all individuals performing such services under this Contract are required to submit per KRS 160.380 to a national and state criminal history background check by the Department of Kentucky State Police and the Federal Bureau of Investigation and have a letter, provided by the individual, from the Cabinet for Health and Family Services stating no findings of substantiated child abuse or neglect found through a background check of child abuse and neglect records maintained by the Cabinet for Health and Family Services.
- H. Contractor shall be in continuous compliance with the provisions of KRS Chapters 136, 139, 141, 337, 338, 341 and 342 that apply to the Contractor or subcontractor for the duration of this Contract and shall reveal any final determination of a violation by the Contractor or subcontractor of the preceding KRS Chapters.

IN WITNESS WHEREOF, the Parties hereto have executed this Contract to be effective as of May 15, 2019.

Contractor's Social Security Number or Federal Tax ID Number: \_\_\_\_\_

JEFFERSON COUNTY BOARD OF  
EDUCATION

KiZAN  
CONTRACTOR

By: \_\_\_\_\_

By: Roger D. Kobel

Title: Martin A. Pollio, Ed.D.  
Superintendent

Title: Roger Kobel  
President/CEO

Cabinet Member: Carmen Coleman



(Initials)

Jefferson County Public Schools  
**NONCOMPETITIVE NEGOTIATION  
DETERMINATION AND FINDING**

1. An emergency exists which will cause public harm as a result of the delay in competitive procedures (Only the Superintendent shall declare an emergency.) —

State the date the emergency was declared by the superintendent: \_\_\_\_\_

2. There is a single source for the items within a reasonable geographic area —

Explain why the vendor is a single source: State contract Reference MA-758-1200000968

3. The contract is for the services of a licensed professional, education specialist, technician, or an artist —

State the type of service: \_\_\_\_\_

4. The contract is for the purchase of perishable items purchased on a weekly or more frequent basis —

State the item(s): \_\_\_\_\_

5. The contract is for proprietary item(s) for resale: This can include the buying or selling of item(s) by students when it is part of the educational experience —

State the type(s) of item(s): \_\_\_\_\_

6. The contract is for replacement parts when the need cannot be reasonably anticipated and stockpiling is not feasible —

State the item(s): \_\_\_\_\_

7. The contract or purchase is for expenditures made on authorized trips outside the boundaries of Jefferson County Public Schools —

State the location: \_\_\_\_\_

8. The contract is for a sale of supplies at reduced prices that will afford Jefferson County Public Schools a savings (Purchase must be approved by Director of Purchasing) —

Explain the logic: \_\_\_\_\_

9. The contract is for the purchase of supplies which are sold at public auction or by receiving sealed bids —

State the items: \_\_\_\_\_

**I have determined that, pursuant to K.R.S. 45A. 380, the above item(s) should be obtained by the Noncompetitive Negotiation Methods since competition is not feasible.**

Dr. Tara Isaacs

Print name of person making Determination

Professional Development and Learning

School or Department

Tara Isaacs

Signature of person making Determination

Date

4/2/19

KiZAN

Name of Contractor (Contractor Signature Not Required)

Requisition Number

Explanation of Noncompetitive Negotiation Methods can be found under K.R.S. 45A.380 and on page 15 in the Procurement Regulations

F-471-1

Revised 05/2011



Statement of Work Prepared for  
Tara Isaacs  
at  
Jefferson County Public Schools  
for  
DL Conference Electronic Sign-in  
System

4/1/2019



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## Your KiZAN Team Leaders

Account Manager	Technical Lead
Ken Fox	David Buckingham
(502) 292-4822	(502) 292-4844
Kenf@kizan.com	Davidb@kizan.com

# Scope and Success Statements

The following statements reflect our understanding of the business problem, the requested solution, and the definition of project success.

## **Business Problem Statement**

Each summer, the Professional Learning department at the Jefferson County Public Schools, hosts a 3-day long conference called the Deeper Learning Symposium. Attendees of the conference can earn PD credit for attending, and therefore are asked to sign in and sign out each day of the conference. This paper-based attendance system is cumbersome to manage after the event when reconciling such a large number of attendees across the 3-day event.

## **Statement of Success**

The Deeper Learning Symposium Electronic Sign-In project will be a success when KiZAN has delivered a solution which allows for the Professional Learning department to accurately capture attendee data when signing-in and signing-out of each day of the Deeper Learning Symposium. Additionally, KiZAN will use the collected data to reconcile attendance with the events in pdCentral.

# Project Activities and Deliverables

Project deliverables are listed below by phase with major activities noted. Actual tasks will be documented in the project plan, tracked and noted in status documents.

## **Requested Work Statement**

The Professional Learning department has requested that KiZAN provide an electronic sign-in and sign-out solution for the Deeper Learning Symposium. The provided solution should be able to reconcile attendance at the Deeper Learning Symposium with registered attendees in pdCentral.

## **Project Duration**

The estimated project time frame is approximately 3 weeks. As part of the project kickoff process, KiZAN will work with Jefferson County Public Schools to designate and allocate the appropriate resources and prepare a project plan that is mutually acceptable.

## **Project Management Approach**

KiZAN will implement this project using an appropriate project methodology. Each of the Phases below will be conducted in partnership with you and geared toward meeting the goals of the project as defined by you above.

	Activities	Deliverables
Initiating	<ul style="list-style-type: none"> <li>• Create preliminary schedule</li> <li>• Conduct internal and customer kickoff</li> </ul>	<ul style="list-style-type: none"> <li>• Project schedule</li> <li>• Meeting Notes</li> </ul>
Engaging	<ul style="list-style-type: none"> <li>• Maintain resource schedules</li> <li>• Maintain project schedule</li> <li>• Manage/Control Budget</li> <li>• Maintain Communication</li> <li>• Maintain Change Control</li> </ul>	<ul style="list-style-type: none"> <li>• Weekly Status/Budget Reports</li> <li>• Meeting Minutes</li> <li>• Change Request Documents (as needed)</li> </ul>
Closing	<ul style="list-style-type: none"> <li>• Conduct internal and customer closeout meetings</li> </ul>	<ul style="list-style-type: none"> <li>• Lessons Learned Documented</li> </ul>

## Deeper Learning Electronic Sign-In Solution

	Activities	Deliverables
Build	<ul style="list-style-type: none"> <li>• Facilitate final requirements review.</li> <li>• Coordinate access to Azure subscription with JCPS IT.</li> <li>• Provision necessary Azure services to support designed solution.</li> <li>• Building on the PowerApps demo, complete functionality necessary for the designed solution.</li> <li>• Document instructions for using the PowerApp mobile application.</li> <li>• Review final solution with Professional Learning department prior to Deeper Learning Symposium.</li> </ul>	<ul style="list-style-type: none"> <li>• Requirements Review Meeting</li> <li>• Deeper Learning Electronic Sign-In solution built with PowerApps and Azure.</li> </ul>
Post-Implementation	<ul style="list-style-type: none"> <li>• Reconcile collected data with pdCentral registered employees.</li> </ul>	<ul style="list-style-type: none"> <li>• Attendees correctly marked as attended in pdCentral.</li> </ul>

KiZAN anticipates 2 days of this work being onsite, with the remainder of the project services performed remotely.

## Project Assumptions

The below assumptions are applicable to the provided Statement of Work.



1. Electronic Sign-In PowerApp users will all have JCPS logins ([first.last@jefferson.kyschools.us](mailto:first.last@jefferson.kyschools.us)) with the appropriate Office 365 license for using PowerApps.
2. KiZAN shall be granted access to an Azure subscription for provisioning the necessary services (Azure SQL database).
3. JCPS will provide Deeper Learning Symposium attendees with a name badge that includes a QR code containing the employee number to uniquely identify each attend.

## Project Exclusions

1. The proposed solution will meet the needs of the Deeper Learning Symposium, to be delivered in time for the Deeper Learning Symposium but will exclude use with other PD sessions outside of the Deeper Learning Symposium. This solution is Phase 1 for being able to be used with all other PD sessions. Phase 2 will be estimated separately.

## Fees, Payments and Terms Summary

This statement of work (SOW) including invoicing and payment terms is subject to and governed by the terms and conditions of the fully executed Master Services Agreement between the Commonwealth of Kentucky and KiZAN for Microsoft Support Services (MA758-1200000968). Fees for labor do not include applicable government taxes.

This SOW includes required components. The pricing for all components is listed below.

### Required Components

Item	Count		Fees
			One-Time
Time and Materials Labor Hours (a)	Rate	Hours	
Project Manager	\$140	12.0	\$1,680.00
Sr Consultant	\$165	51.0	\$8,415.00
The actual cost may vary up or down by 15% based upon actual staffing consumed.			\$1,514.25
Gross Total			\$11,609.25

(a) This is only an estimate. This price quote is valid for 60 days from receipt.

## Statement of Work Projected Start Date

KiZAN works hard to ensure that work is started and finished on time. We will work with you to ensure that necessary staff is available to meet the needs of the project in all its phases both at KiZAN and at the Customer.

# Statement of Work Projected Start Date

KiZAN works hard to ensure that work is started and finished on time. We will work with you to ensure that necessary staff is available to meet the needs of the project in all its phases both at KiZAN and at the Customer.

Based upon mutual discussions, the expected Start Date of this Project is: May 15, 2019

# Statement of Work Acceptance

The project scope, terms and conditions are as outlined in this document. Once fully executed, this document will become the contract for the project defined in this document. The Customer's signature below authorizes KIZAN to begin the services described above and indicates the Customer's agreement to process and pay the invoices associated with these services.

Within 3 business days of receipt of a signed Statement of Work the KiZAN assigned project manager and your account executive will be in touch to schedule a Project Kickoff and confirm desired start and completion dates. At the Project Kickoff, the KiZAN Project Manager will present the proposed project plan and communications plan. The project manager will also clarify the change control process to be followed, confirm the Customer Contact and any other project administrative items.

Jefferson County Public Schools		KiZAN Technologies, LLC	
Signature: <i>Tara L. Isaacs</i>		Signature <i>Roger D. Kobel</i>	
Print Name: <i>Tara L. Isaacs</i>		Print Name <i>Roger D. Kobel</i>	
Title <i>Director</i>	Date <i>4/16/19</i>	Title <i>President &amp; CEO</i>	Date <i>4/12/2019</i>

Please complete the following:

## Project Point of Contact

Name: *Tara L. Isaacs*

Email Address: *tara.isaacs@jefferson.kyschools.us*

Phone Number: *502-485-3961*

Send Invoices To: *Tara L. Isaacs*

Name/Department: *Professional Development & Learning*

Address: *701 S. Hancock Street*

City, State, Zip *Louisville, KY 40203*

Email Address: *tara.isaacs@jefferson.kyschools.us*



Phone Number: 502.485.3961

Can invoices be sent via  
email?

Yes ☒ No ☐