

# 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 American Institutes for Research® (hereinafter "Contractor"), with its principal place of business at 1400 Crystal Drive, 10th Floor Arlington, VA 22202.

## 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:

The American Institutes for Research's Center on Great Teachers and Leaders (GTL) will provide the Accelerated Improvement Schools (AIS) leaders with expertise and coaching on systems for development of turnaround school leader competencies, and systems for support and growth of teachers in Commonwealth School Improvement (CSI) schools; to include components of recruitment and retention. GTL will also provide professional learning experiences directly to the AIS leadership team in order to develop best practices of district support and accountability; to include development, implementation, and monitoring of a strategic plan focused on supporting the capacity building of turnaround teachers and leaders. Each component of the trainings is described in Attachment A: Scope of Work. In the event the Board determines that it is

impractical or impossible for in person services to occur, Contractor may provide these services remotely using video conferencing technology as necessary.

In regards to Article XII, the Contract Administrator hereby agrees that all right, title and interest in the materials/performance provided by the Contractor in connection with the Services belong to the Contractor.

### 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:	Shall not exceed \$1,500,000.00
Progress Payments (if not applicable, insert N/A):	Nineteen (19) monthly payments of \$78,947.37 beginning March 2021. The final payment will occur in September 2022.
Costs/Expenses (if not applicable insert N/A):	N/A
Fund Source:	Title I School Improvement Section A Project Code 320 GC

### ARTICLE IV Term of Contract

Contractor shall begin performance of the Services on March 10, 2021 and shall complete the Services no later than August 31, 2022, 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, disability, or limitations related to pregnancy, childbirth, or related medical conditions. 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) business 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 access to school grounds on a regularly scheduled and continuing basis for the purpose of providing services directly to a student or students, 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 administrative findings of 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 March 10, 2021.

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

JEFFERSON COUNTY BOARD OF  
EDUCATION

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

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

American Institutes for Research®  
CONTRACTOR

By: Joseph Wagner, Jr.  
Digitally signed by Joseph Wagner, Jr.  
Date: 2021.02.17 15:51:22 -05'00'

Title: Joseph Wagner  
Vice President, Contracts, Grants,  
and Procurement

Cabinet Member: \_\_\_\_\_

(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: The American Institute for Research ® is a single source service providing educational coaching services through a trademarked process.

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: \_\_\_\_\_

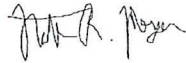
**I have determined that, pursuant to K.R.S. 45A. 380, the above item(s) should be obtained by the Noncompetitive Negotiation Methods since competition is not feasible.**

Dr. Nathan Meyer

Print name of person making Determination

Assistant Superintendent, Accelerated Improvement Schools

School or Department



Signature of person making Determination

Date

2/19/21

American Institutes for Research ®

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

**Contractor: American Institutes for Research ®**

## **Attachment A, Scope of Work**

**Task 1.** Provide Professional Development and Coaching Support for Accelerated Improvement Schools Leaders and the Education Recovery Specialists (\$985,000) Throughout Years 1 and 2, the Center for Great Teachers and Leaders (GTL) of American Institutes for Research® (AIR) will provide coaching and technical support to build the capacity of the AIS leadership team and the 34 ERLs for support of school turnaround leadership, with a focus on supporting individual principals, distributing leadership responsibilities, and providing strategic resources to schools. GTL will specifically focus on developing AIS and ERL skills as turnaround principal coaches and supporters; organizational change leaders; and turnaround specialists. Professional development will build turnaround school research and best practice knowledge and turnaround leader practice competency.

Professional development sessions will focus on school improvement topics prioritized through planning meetings/needs-sensing activities that will take place in the first two months of the contract. The following tools and resources to support the training and coaching are included in this work: • AIR Turnaround Leader Self-Assessment, • School Improvement Implementation Continuum for the Systemic Improvement Framework, • Systemic School Improvement Framework, • School Achievement Implementation Path, • Quick Win Picker, and • other tools as identified to support professional learning.

AIR uses a mix of appropriate professional development approaches to support adult learning and immediate application of learning to work contexts. AIR is capable of and has budgeted for delivery of in-person and online professional development, as health and safety concerns dictate. AIR will deliver differentiated professional development to AIS and KDE leaders, and learning will be tailored to leader work responsibilities. The following describes different approaches for systems leaders.

Coaching for AIS Leader and KDE Liaison (2x/month; 60-min. sessions) This partnership begins with one-to-one coaching for the AIS leader and KDE liaison provided by one AIR school turnaround expert. Across the span of the first 10 months, twice-monthly 60-minute virtual coaching sessions will be scheduled. Coaching sessions will focus on developing and supporting leadership competencies, thought partnership, sharing of resources to support school improvement initiatives, systemic leadership workforce management, and could include connections to subject matter experts or other district leaders on addressing specific problems of practice.

AIS trainings (4 - three-hour trainings) Professional development for the AIS team will focus on understanding school turnaround research and best practice, organizational change leadership research and best practice, assessing and developing turnaround leadership competencies, and identifying key foundational components of school improvement. All training sessions will be delivered virtually and will be designed for active participation. As a result of the AIS team participating in this set of trainings, professional development for the ERL trainings in



Year 2 will be determined. All task sessions/meetings will take place virtually until July 2021 and possibly beyond as COVID-related regulations require.

AIS/ERL trainings (6 - three-hour trainings) Designed collaboratively between AIS and AIR, professional development for the ELRs will focus on developing knowledge and understanding of school turnaround research and best practice, creating a common language and vision for turnaround school improvement, coaching leaders in developing turnaround competencies, and building and supporting a monitoring system. All training sessions will be delivered virtually unless travel conditions permit on-site delivery and will be designed for active participation based on adult learning theory and research.

AIS/ERL Community of Practice Sessions (60–90 minutes) using AIR’s Innovation Hub (6–8 sessions) Behavioral change, skills development, and systems transformation rarely occur by just reading a manual or attending a conference. Instead, sustainable change occurs through multiple learning opportunities over time—community of practice (CoP) opportunities will be experiential, relevant, collaborative, and ongoing. Blending shoulder-to-shoulder coaching and professional learning sessions with a CoP not only scales the reach of learning but also creates archives and resources that future AIS/ERL staff can use without replicating the cost and resource allocations to reproduce the experiences wholesale. AIR will convene a CoP to deliver targeted technical assistance to a cohort of 30 to 50 identified participants composed of AIS/ERLs and guided by research that identifies the characteristics of effective CoPs. Selected participants will participate virtually in six 60- to 90-minute CoP sessions during the contract period. The topics for each CoP will be determined collaboratively by JCPS leadership, participants, and AIR team members. The collaborative process is designed to build CoPs in which participants openly and honestly reflect on their practice and collaborate to solve problems of practice. The six sessions will be designed to do the following:

- Focus on collaboratively exploring questions that guide school improvement and equity within the context of the selected problem of practice: – What specifically are we trying to accomplish? – What change might we introduce and why? – How will we know that a change is an improvement?
- Develop principals’ data analysis skills through multiple measures, including outcomes and primary drivers.
- Accelerate principals’ growth in using data to make equitable decisions.

AIS/ERL Coaching In Year 2, one-on-one coaching the AIS leaders and ERLs would begin with 10 months of twice monthly 60-minute virtual sessions. Up to seven GTL coaches will work directly with AIS leaders and ERLs to focus on developing and supporting leadership competencies, thought partnership, and sharing of resources to support school improvement initiatives, and could include connections to subject matter experts or other district leaders on addressing specific problems of practice.

Pathway to Exit/Sustainability Planning (AIS Leaders) Toward the end of Year 1, the GTL team will support AIS leadership in a 6-month data-driven process to develop a Pathways to Exit/Sustainability Plan that serves to set milestones to guide schools out of the improvement process and articulate a set of supports for schools along the pathway. This plan will include a series of meetings with AIS leadership and two GTL turnaround experts who will support JCPS in developing and implementing a concrete plan for leading all schools toward a path to exiting improvement status.

**Task 2. Progress Monitoring and Program Evaluation (\$249,000)** Systemic school improvement and turnaround are fueled by strong leadership working with good data. To this end, AIR proposes a progress monitoring and evaluation of the turnaround leadership work: • Progress monitoring: Expand JCPS access to strong data on school performance. • Program evaluation: Provide timely feedback on the leadership professional development and coaching program.

Progress monitoring: Expand JCPS access to strong data on school performance JCPS and KDE maintain school performance, student demographics, and staffing data that support performance benchmarking, but data dashboards and analytics are still needed for user-friendly progress monitoring. Accessible analytics and dashboards provide central office and school-level educators with a common view for turnaround goal-setting and benchmarking. AIR will support JCPS data dashboard expansion by completing the following tasks: • Conduct a data inventory (with AIS and KDE): To ensure that the work progresses with efficiency, the GTL team will begin Task 2 with an informal data inventory. The data inventory will consider all of the data collected from AIS schools, identify key leading and lagging metrics, and incorporate those into the progress monitoring process of building an Accelerated District Data dashboard. This work will take place through conversations with AIS and KDE leadership and will result in an inventory that can be used to determine next steps for progress monitoring as well as communicate clearly to all stakeholders the complexity of the work, reducing redundancies and creating efficiencies wherever possible. • Build Accelerated School Improvement Dashboard and roll out (with AIS and principals): Essential to the school improvement process is the consistent progress monitoring of critical school indicators by district and school leaders. Using the results of the data inventory, the GTL team will work with these leaders to begin the development and implementation of an Accelerated School Improvement Dashboard. The Accelerated School Improvement Dashboard will be developed through an iterative process drawing on the expertise and experience of the AIS team, KDE, and a small set of principals who can respond to beta versions and support the refinement of the dashboard to make it relevant and impactful for their work. The dashboard will be used in subsequent tasks to conduct quarterly monitoring meetings with schools that provide opportunities for the district to learn which school support strategies are working or not working and to develop just-in-time course corrections. • Provide professional development in progress monitoring: After the dashboard is complete, the GTL team will pilot the dashboard with the AIS team and a small set of select principals. During this time, the AIS team will engage in monthly planning, implementation, and support sessions with two GTL school improvement experts once a month for 12 months. These sessions will focus on the further rollout of the progress monitoring system in additional AIS schools, preparing an implementation plan, and then supporting and coaching the AIS team in the launch of large-scale implementation.

In Year 2, the progress monitoring system will be fully implemented across AIS schools. AIR will provide planning and support for the AIS team to conduct systematic data review meetings with each AIS school and engage principals in data-informed coaching/support. The data review meetings are intended to assess the level of implementation of the school improvement goals and strategies, identifying for each school what is working, what is not working, and areas of needed support to ensure that schools have the resources needed from AIS and the district to meet intended outcomes.

The progress monitoring dashboard will include extant data elements currently available through KDE and JCPS. As an option for further consideration in Year 2, AIR will explore interest

and availability of additional data to expand the data dashboard. For example, JCPS may wish to add leadership workforce tracking metrics to support teacher-leader identification or turnaround principal succession, or JCPS may wish to add a school culture/leadership metric as a leading indicator for school improvement. AIR maintains validated measures that may be leveraged for data expansion, as needed.

Program evaluation: Provide timely feedback on the leadership professional development and coaching program. As coaches and consultants, AIR uses data to inform our work and report on our progress. We will plan a small evaluation study to provide formative feedback on our work and report progress to KDE and JCPS.

The evaluation study will be conducted independently by a separate AIR research team to:

- Monitor program implementation and inform program improvement: AIR researchers will monitor program delivery of high-quality professional development and coaching. To monitor program implementation, AIR researchers will collect and report on program implementation data quarterly. To monitor program implementation, AIR will collect (a) program enrollment and participation data, (b) formal professional development content and cadence, and (c) coaching log data on coaching content and cadence.
- Report AIS and ERL satisfaction with coaching and professional development: AIR technical assistance consultants strive to provide rigorous, useful coaching and professional development that advances turnaround leadership support. AIR researchers will collect survey data from AIS and ERL participants on the satisfaction, rigor, and utility of professional development, and we will report data quarterly to KDE and JCPS.
- Gauge changes in school leadership and turnaround principal experiences: Ultimately, AIR professional development aims to improve school-level leadership and turnaround principal support. To gauge program impact and inform AIS/ERL work, AIR proposes to collect survey data on (a) principal coaching/supervision quality from the turnaround principals and (b) school leadership quality in schools from teachers within AIS schools. We anticipate that both surveys will be administered twice per year.

Beyond school-level progress monitoring and diagnostic reports, KDE and AIS would benefit from aggregated reports that illustrate district progress on a variety of leadership outcomes and AIR progress in implementing Tasks 1 and 2. These reports will highlight the participation, satisfaction, and application of learning in schools from the professional learning and coaching GTL will provide. GTL experts will collect and report on the data, review with KDS/JCPS, discuss supports/barriers to the program, and determine what adjustments are necessary.

The GTL team will (a) prepare and report school leadership trend data quarterly, which aggregate metrics such as teaching conditions, instructional leadership 360, principal learning conditions and principal time use data for all 34 schools and (b) prepare and report program implementation data (e.g., participation in differentiated professional development data, coaching log data, user satisfaction with professional development data) on services and participation by principals, ELRs, supervisors, and teachers in Tasks 1, 2, and 3. Administration of additional surveys will be negotiated through the planning phase and contingent upon available funding.

**Task 3. Partnering with KDE to Support Project Management (\$160,000)** The GTL Center team is prepared to coordinate and support ongoing project management with KDE. This



coordination and support will include monthly meetings in Year 1 and bimonthly meetings in Year 2 as the project is well underway.

Planning meetings (review overall scope, timeline, communication norms, conduct needs sensing) To launch these meetings, a kickoff call with GTL experts and AIS and KDE leaders will include a review of the project scope of work, discussion of timelines, and establishment of project communication norms and expectations.

Biweekly meetings (2x/month, then 1x/month in Year 2) Following the initial planning meetings, GTL experts will continue with biweekly meetings with AIS and KDE leaders to review the project scope, timeline, and budget, and examine school leadership trend data and program implementation data developed in Task 2. These meetings will be facilitated by GTL experts and will generate next steps for all entities, ensuring timely updates, midcourse corrections, and a consistent focus on impact.

**Task 4. Building Coherence through Strategic Planning (\$106,000)** In complex systems involving multiple layers of individuals operating in dynamic environments, it is important to understand how components of the system intersect and interact as well as the roles of relevant actors, activities, and settings that comprise the system. The GTL Strategic Planning process will start 4 to 6 months into the project and will involve quarterly meetings with KDE, Jefferson County's AIS, other relevant Jefferson County program leaders, and other vendors working within Jefferson County's comprehensive school improvement schools (e.g., Carnegie Foundation, Public Impact) to ensure that all parties are working toward common goals, reducing overlaps or redundant work, and streamlining efforts and communications.

Planning meetings with KDE/AIS. The work will begin with a planning meeting in which GTL experts will work with AIS/KDE to determine the stakeholders to include in the meetings, set the scope of the sessions, and determine an agenda for the kickoff meeting.

Quarterly stakeholder meetings. After the kickoff meeting, the work will continue with quarterly stakeholder meetings that will be planned with GTL experts and the AIS/KDE team and will focus on specific needs for streamlined collaboration (e.g., develop AIS theory of action, RACI chart, reduce redundancies).