

PROPOSAL TRANSMITTAL FORM

**Social and Emotional Learning Support Services, Professional Development to Support Product
Social and Emotional Learning Support Materials for staff and students**

Name of Offeror: Franklin Covey Client Sales, Inc.

Contact Person: Wes Bender

Title: Client Partner

Location of Offeror's Principal Place of Business:

2200 Parkway Boulevard, Salt Lake City, UT 84119

Location of Place of Performance (if different from above):

Number: 801-817-1776 Phone
Fax Number: _____

Mailing Address: 2200 Parkway Boulevard, Salt Lake City, UT 84119

By my signature below, I hereby represent that I am authorized to and do bind the offeror to the provisions of the attached proposal. The undersigned offers and agrees to perform the specified personal and professional services in accordance with provisions set forth in the Request for Proposals (RFP). Furthermore, the undersigned fully understands and assures compliance with the Conditions of Solicitation and Standard Terms and Conditions contained in the RFP. The undersigned is fully aware of the evaluation criteria to be utilized in awarding the contract.

Authorized Signature Date

Proposal Due Date: May 10, 2022 10:00am CST

Submitted to Central Bidding by the above date and time or received at Simpson County School District Administrative Office by the above date and time.

**Social and Emotional Learning Support Services, Professional Development to Support
Product**

Social and Emotional Learning Support Materials for staff and students

See page number [12] for delivery instructions.

PART I



Social and Emotional Learning Support Services,
Professional Development to Support Product Social and Emotional
Learning Support Materials for Staff and Students.

Simpson County School District

FranklinCovey Client Sales, Inc.
2200 West Parkway Blvd
Salt Lake City, Utah 84119-2099

To Simpson County School District,

FranklinCovey was incorporated in 1996. Since our inception, we have been providing content, tools, methodology, training and thought leadership to executives and administrators in various industries. Today, our clients include 90 percent of the Fortune 100, more than 75 percent of the Fortune 500, thousands of small and mid-sized businesses, as well as numerous government entities and educational institutions. Organizations and individuals access FranklinCovey products and services through corporate training, licensed client facilitators, one-on-one coaching, public workshops, and franklincovey.com.

We are a global professional service firm offering learning and performance solutions to assist professionals and organizations to increase their effectiveness in productivity, leadership, communication, and sales.

FranklinCovey Education, a division of FranklinCovey, has been one of the world's most prominent and trusted providers of educational leadership programs and transformational processes. Our mission is to enable greatness in students, teachers, and school communities everywhere.

FranklinCovey's unique approach to education is anchored in timeless principles. Our award-winning content has been researched and refined through years of real-world experience. Our *Leader in Me* solution began with creative synergy between educators and FranklinCovey and has grown through the same process. Over more than a decade, we have helped thousands of schools in over 50 countries establish new paradigms, develop new skills, and achieve transformational results in leadership, culture, and academics. During that time, we have continuously increased our investment in research, video production, student curriculum, empowering instruction, new learning modalities, technology platforms, and in world-class professional learning content.

We have grown our internal team of educators whose combined experience is over 1,000 years of classroom teaching and administration. Our online tools and services continue to expand and now include over 5,000 printable resources, over 1,300 videos and hundreds of articles, stories and images. New content is produced and delivered weekly with special resources for principals and coordinators produced every month. *Leader in Me* is able to measure impact and provide services to meet evolving educational challenges and inspire lasting change.

Leader in Me is a whole-school transformational model that empowers students, staff, and families with the mindset, knowledge, and skills to be life-ready leaders. Essential to this leadership development is its unique approach to student-led learning and applying effective social and emotional skills in real-life situations. *Leader in Me* Schools accomplish this by incorporating leadership principles and practices school wide, including the *Leader in Me* Framework and *The 7 Habits of Highly Effective People*®, which allow schools to build systems that empower students to learn and practice

leadership skills—both at school and at home.

Leader in Me is endorsed by CASEL as an evidence-based social-emotional learning process. An extensive review by CASEL found *Leader in Me* to meet the highest level of program design and implementation support in all measured categories. The review also indicated that *Leader in Me* offered the most comprehensive program design and implementation to date.

FranklinCovey writes in response to Simpson County School District's request for social and emotional learning support services including professional development and support materials for staff and students. We are committed to providing the products and services of leadership training.

We appreciate your consideration.

Primary contact:

Wes Bender, Client Partner

Phone: 860.772.5321

wes.bender@franklincovey.com

Sincerely,

A handwritten signature in black ink, appearing to read 'Meg Thompson', with a long horizontal flourish extending to the right.

Meg Thompson

Vice President - General Manager

PART II

QUALIFICATIONS OF COMPANY

FRANKLIN COVEY CLIENT SALES, INC.

FranklinCovey is a global professional service firm offering learning and performance solutions to assist professionals and organizations with increasing their effectiveness in productivity, leadership, communication, and sales with the ultimate aim of delivering transformational results. FranklinCovey's expanding reach now extends to more than 150 countries, with over 2,000 associates working toward the common mission of *Enabling Greatness in People and Organizations Everywhere*.

FranklinCovey was incorporated in 1996. Since its inception, it has been providing content, tools, methodology, training and thought leadership to executives and administrators in various industries. Today, its clients include 90% of the Fortune 100, more than 75% of the Fortune 500, thousands of small and mid-sized businesses, as well as numerous government entities and educational institutions.

FRANKLIN COVEY EDUCATION

For nearly three decades, FranklinCovey Education, a division of FranklinCovey, has been one of the world's most prominent and trusted providers of educational leadership programs and transformational processes. Our mission is to *Enable Greatness in Students, Teachers, and School Communities Everywhere*. We are partnered with nearly 1,000 school districts throughout the United States and serve over 5,000 schools globally.

We have grown our internal team of educators whose combined experience is over 1,000 years of classroom teaching and school and district-level administration. *Leader in Me* (LiM) online tools and services continue to expand and now include over 5,000 printable resources, over 1,300 videos, and hundreds of articles, stories, and images. New content is produced and delivered weekly with special resources for Principals and Lighthouse Coordinators produced every month. *Leader in Me* measures impact and provides services to meet evolving educational challenges and inspire lasting change.

Vendor and Management Profile

FranklinCovey Client Sales, Inc.
2200 West Parkway Blvd
Salt Lake City, Utah 84119-2099
Front Desk: 1-801-817-1776
Toll-Free Numbers: 1-800-827-1776 or 1-888-868-1776
Fax Number: 1-801-817-8403
info@franklincovey.com
FranklinCovey.com; theleaderinme.com

QUALIFICATIONS OF PERSONNEL

FRANKLIN COVEY SUPPORT TEAM

The FranklinCovey Education *Leader in Me* team includes over 200 team members serving in a variety of capacities – central office, operations, product development, innovations and technology, field support, and coaching. The *LiM* coaching team includes over 85 instructors. Most are former principals; all are former educators. *Leader in Me* coaches have a combined total of 483 years of experience coaching in education and 290 combined years of experience coaching social-emotional learning implementation.

The *Leader in Me* coaching team has spent many years on the front lines of education, working in classrooms and as administrators. This experience gives *LiM* coaches firsthand knowledge of the barriers and fatigue which can impact the implementation of new initiatives. Coaches support schools in overcoming these challenges.

The coaches have a combined total of:

- 682 years of teaching expertise
- 507 years of administration expertise
- 250 years of other PK-12 expertise

In addition,

- 90% have master's degrees in education or another related field
- 15% have doctorate degrees in education or another related field
- 92% have experience working with Title I and/or high-poverty school populations
- 57% have experience working with urban school populations

QUALIFICATIONS OF EXPERIENCE

HISTORY

FranklinCovey Education (FCE) has worked extensively with 9 of the 10 largest and most diverse school districts across the nation. Specifically, FCE has delivered student leadership training to New York City Public Schools, Chicago Public Schools, Houston Independent School District, Los Angeles Unified School District, Montgomery County Public Schools, and more. The *Leader in Me*, as well as other FranklinCovey professional development training and services, have been provided to schools in nearly 1,000 districts throughout the United States. Some districts implement services districtwide while other districts implement services at select schools.

Leader in Me schools are united by a common vision and purpose to empower students to be leaders, equipped with the life skills required to succeed in a global economy. FranklinCovey's team focuses on tailoring solutions to the diverse needs of each student population.

WHO ARE YOUR PARTNERS?

FranklinCovey Team – Our team is listed below. Resumes provided on next page for individuals responsible for successful delivery of training, coaching and communication with school sites and school districts related to FranklinCovey.

Client Partner: Primary point of contact for FranklinCovey in regard to school implementation related to existing and new schools.

Wes Bender Email: Wes.Bender@FranklinCovey.com Phone: 770-490-4946

Education Services Partner: Provides support to Client Partner/Coach/Consultant related to scheduling training or overviews. Point of contact for ordering materials.

Jennifer Parr, Email: Jennifer.parr@FranklinCovey.com Phone: 949-682-6346

Coach/Consultant: Direct contact with principals and school staff to implement The Leader in Me. Coach/Consultant will deliver training and on-going coaching support.

Connie West, Email: Connie.West@FranklinCovey.com Phone: 251-604-3316

Client Services Coordinator: Responsible for invoicing, shipping materials, TLIM Online support, and oversees workshop logistics.

Kaysha Baker Email: Kaysha.Baker@FranklinCovey.com Phone: (801) 548-8810

Regional Managing Director: Share best practices for Mid-Atlantic initiatives and provide strategic guidance.

Dustin Odham, Email: Dustin.Odham@FranklinCovey.com Phone: 314-583-0179

Vice President Education: Share best practices for large initiatives and provide strategic guidance. Meg Thompson Email: Meg.Thompson@FranklinCovey.com Phone: 267-716-4394

FranklinCovey High School Consultant: Direct contact with principals and school staff to implement The Leader in Me. Coach/Consultant will deliver training and on-going coaching support.

Lonnie Moore Email: Lonnie.Moore@FranklinCovey.com Phone: (813) 215-4941



HAYWOOD COUNTY SCHOOLS

900 East Main Street
Brownsville, Tennessee 38012
731-772-9613 office 731-772-3275 fax
www.haywoodschools.com

Joey Hassell
Superintendent

April 28, 2022

To whom it may concern:

This letter of reference is for The Leader in Me as an SEL initiative. I have been a part of implementing the Leader in Me in Haywood County School District; Brownsville, TN for approximately six years. In my experience with Leader in Me we made both decreases in discipline referrals and improvements in academic achievement. HCS saw decreases in discipline referrals which has in turn created more instructional time for students. As a result, our benchmark assessments have shown both growth and increased achievement mastery. These results have provided teachers with guiding points to drive future lessons and areas in which to focus reteaching. The results have been noted by all staff, including paraprofessionals, teachers, school administration and district administration.

The impact Leader in Me has on teachers, students and families cannot be fully quantified. I have many stories of teachers, students and parents who experienced life changing moments through the Leader in Me. We intentionally focused on the adults first. Administrators, teachers and staff can all attest to the personal growth they have experienced through the Leader in Me.

Another important aspect to mention is Leader in Me tied the other initiatives we were implementing together. Haywood County Schools provides training in The Leader in Me initiative, as well as restorative practices focusing on trauma-informed research. The Leader in Me addresses the whole child with an emphasis and focus on fostering a strong intrinsic motivation to do what is right. The common language of The Leader in Me helps children learn to take responsibility for their actions and choices, to make more positive choices and to work on all areas of their lives, not just behavior. The goal is to keep students in regular classes with very little loss of instruction time. Our school district has implemented The 7 Habits of Highly Effective People through The Leader in Me for grades Pre-K - 12. The program is designed to produce transformational results such as higher academic achievement, fewer discipline problems, and increased engagement between teachers and parents. The program utilizes alternative discipline or consequences for inappropriate behavior before reaching the level of suspension or expulsions. Our high school will also be using a restorative practices approach to discipline for ALL students. This approach will be geared towards getting to know the "why" behind student behaviors and having conversations with students about what appropriate behaviors should look like in situations. All of our schools will also utilize an In-School Suspension placement, Thursday school assignments, and parent conferences with students displaying inappropriate behaviors. All of these practices will be used with SWDs to help support behavior as well as help ensure that discipline procedures and practices do not contribute to discrepancies among subgroups. SWDs that are identified as having behavioral issues will have an IEP meeting called to consider a Functional Behavior Assessment (FBA). The FBA will be used to identify triggers and how to address problem behaviors. Through this process the district will also use school psychologist and behavior consultant to help provide behavioral supports for SWDs.

Haywood Middle School has also implemented RTI2-B this school year. The alignment of RTI2-B and Leader in Me is amazing and produces positive results. RTI2-B is a promising framework for prevention and intervention within an integrated, three-tiered approach. Each tier of the framework involves careful reflection on the needs of students, the design of interventions matching those needs, and the collection of data to evaluate progress (individually for students and collectively as a school). These efforts require a shared school-wide commitment to teach and reinforce positive behavior. It also involves adopting an optimistic view that all students can learn appropriate behavior if sufficient and supportive opportunities to



HAYWOOD COUNTY SCHOOLS

900 East Main Street
Brownsville, Tennessee 38012
731-772-9613 office 731-772-3275 fax
www.haywoodschoools.com

Joey Hassell
Superintendent

learn are provided. The purpose of RTI2-B is to empower educators to equip all students with the opportunity to meet high expectations regarding behavior and the support to reach every student.

Haywood High School has also implemented Restorative Practices and daily classroom circles. Advisory is implemented at Haywood High. This is specifically to address the social-emotional needs of the student's population, and to address college and career readiness.

The coaching and support we received from Leader in Me was outstanding. They adjusted implementation as needed and provided outstanding support. The team was creative and patient with us through our cycles of implementation. Due to various "road blocks" we have had to push pause and restart in a few situations. The support from Leader in Me through this process was outstanding and provided us with the necessary means to move forward.

I cannot say enough great things about Leader in Me. As a leader in the district, my personal experience with Leader in Me has helped me to grow professionally, but also has helped me with my personal life as well. We are proud that Leader in Me continues to "grow leaders" and look forward to the future of Haywood County.

If you have any other questions, please free to call me at Gina Rawson, 731-772-9613.

Gina Rawson
Deputy Superintendent

Haywood County Schools
Federal Programs/ Finance/Operations
Gear-Up Director/21st CCLC
900 East Main Street
Brownsville, TN 38012
731-772-9613 ext 2770

"Do all the good you can. By all the means you can. In all the ways you can. In all the places you can. At all the times you can. To all the people you can. As long as ever you can."



Kelli M. Speed
Director of Federal Programs
3951 12th Street, Bldg. A
Meridian, MS 39307
kspeed@mpsdk12.net
Office: 601 484.4960
Fax: 601 484.5176

This letter of reference is for The Leader in Me as an SEL initiative. I have been a part of implementing the Leader in Me in Meridian Public School District. In my experience with Leader in Me we made substantive decreases in discipline referrals and improvements in academic achievement. We saw decreases in discipline which created more instructional time for students. As a result, our achievement has improved. Note on school improvement, if you were to ask the faculty and staff they would agree that Leader in Me played a role in the improvement.

The impact Leader in Me has on teachers, students and families cannot be fully quantified. I have many stories of teachers, students and parents who experienced life changing moments through the Leader in Me. We intentionally focused on the adults first and our teachers in both districts can attest to the personal growth they experienced.

Another important aspect to mention is Leader in Me tied the other initiatives we were implementing together. We called it our "operating system" that helped with implementing the "apps" in the district. A great example of this was our benchmark assessments. In the second year of implementation students used their benchmark assessment results to set goals and monitor their own progress towards meeting those goals.

The coaching and support we received from Leader in Me was outstanding. They adjusted implementation as needed and provided outstanding support. The team was creative and patient with us through both implementations.

I cannot say enough great things about Leader in Me. My own personal experience was with my own growth. During this time with the pandemic effects present at work and home, I have utilized the lessons learned with Leader in Me and 7 Habits to support my personal socio-emotional well-being.

If you have any other questions, please free to contact me at kspeed@mpsdk12.net

Kelli M. Speed

A handwritten signature in blue ink that reads 'Kelli M. Speed'.

Meridian Public School District
Director of Federal Programs



Wesley D Bender

Curriculum Vitae

770-490-4946

wes.bender@franklincovey.com

[linkedin.com/in/wesley-bender-705951b](https://www.linkedin.com/in/wesley-bender-705951b)

Grounded in leadership, culture and execution

Proven by 19 years of stewardship in business leadership / sales, and nonprofit operations

Passion for servant leadership, measurable and sustainable results especially in the areas of strategic planning, market research and emotional intelligence

Motivated by speaking engagements, group work, volunteer development, social impact, emotional intelligence, and building inspired teams

CURRENT STEWARDSHIP

CLIENT PARTNER, FRANKLINCOVEY | EDUCATION — AUGUST 2017 - PRESENT

Partner with education institutions to explore, build buy-in, align district and state-level initiatives, raise funds and ultimately purchase FranklinCovey Leadership Development Content and Training (in-person, virtual and OnDemand)

- I. **Stewardship:** Lead through inspiration and trust a team of full-time staff serving 76 schools throughout Tennessee and Mississippi.
- II. **Impact:** Across a diversity of demographics, developed deep, long-term relationships with school board members, district-level staff, school administrators, teachers, students and families. Aided school districts in securing over \$1M in financial support.

PREVIOUS STEWARDSHIP

SENIOR CONSULTANT, DAXKO T2 CONSULTING — OCTOBER 2014 - DECEMBER 2015

Develop leads, build client base and facilitate solutions in the areas of board development, financial development, strategic planning and market research

- I. **Stewardship:** Consulted in-house for Daxko software solutions as well as managed an in-house call center for market research. Navigated numerous data insight tools to provide clients the most relevant information for planning and development.
- II. **Impact:** Developed synergy through interdependent collaborations with all departments throughout Daxko. Built consensus among internal departments and large clients to move design projects forward.

FOUNDER, THE CAUSE DRIVEN CONSULTING GROUP, LLC — JANUARY 2014 - OCTOBER 2014

(Company was acquired in October 2014 by Daxko T2 Consulting)

- I. **Stewardship:** Independent consulting firm focused on youth development innovation and customized outcome tools measuring social capital. Clients include but not limited to: South Carolina YMCA State Alliance, FLOOD student missions, Ultimate Life University, The Fat Boy Chronicles, Guide, Inc., YMCA Blue Ridge Assembly, Meals by Grace.
- II. **Impact:** Produced 2 day conference with 57 non-profit attendees, April 2014. Grew book of business in 10 months gaining national attention and approached to collaborate with Daxko T2 Consulting.

ASSOCIATE EXECUTIVE DIRECTOR OF YOUTH AND INTERNATIONAL INITIATIVES

YMCA OF METRO ATLANTA — 2004 - 2014

Develop and provide strategic leadership to the Metro Atlanta YMCA including its staff, governance volunteers and program volunteers

- I. **Stewardship:** Hired, trained and equipped youth staff and volunteers across 27 regional branch locations. Designed logic models, program rubrics and outcome measures for 75,000 individuals age 0-25. Managed central office budget of \$1.5M and consulted for total branch budgets of \$5.4M.
- II. **Impact:** Taught students fundraising skills equipping 260 students to attend mission efforts in 8 different countries. Engaged 500+ annually in community leadership to under-resourced children (K-5), students from all demographics included.

OTHER ACCOMPLISHMENTS / DISTINCTIONS

2019 FranklinCovey Chairman's Club - 2017 YMCA Middle Tennessee Volunteer of the Year - 2013 Keynote Speaker YMCA Youth Hui (New Zealand) - 2012, 2013 Educator Trainer Ultimate Life University (DisneyWorld) - 2011 YUSA International Conference emcee (San Francisco) - 2002-2004 Student Minister for West End Church of Christ

Certifications / Publications: YMCA Team Leader - RightPath Trainer - Co-Author *Strengthening the Organizational Heart*

EDUCATION

24 hours toward a Masters of Divinity, Lipscomb University, Nashville TN

Bachelor of Arts, major in Biology and double minors in Bible and German, Lipscomb University, Nashville TN

High School Graduation Senior Speaker, Farragut High School, Knoxville TN

JENNIFER PARR

EDUCATION

Bachelor of Science in Marketing May 2006
The University of Tampa
Minor: Communication

Semester Abroad at Monash University Spring 2005
Melbourne, Australia

PROFESSIONAL EXPERIENCE

Franklin Covey – Education Division Asheville, NC
Quality Partner/Business Development July 2017 – Current

- Successfully meet and exceeded yearly revenue goals of over 2 million while developing and maintaining strong relationships with a territory of over 200 schools in the Carolina's and Tennessee.
- Empathetic listening and effectively understand client needs and customize product solutions, during virtual zoom meetings and in-person meetings, to increase revenue in the existing territory
- Effectively manage customer data, detailed client meeting notes, and contracts in Sales Force.

FernLeaf Community Charter School Asheville, NC
Elementary School Teacher August 2016 – June 2017

- Effectively used non-violent communication and/or compassionate communication methods in the classroom.
- Excelled in cultivating and maintaining positive and productive relationships with students, parents, teachers, administration, and the community.
- Developed engaging lessons and hands on learning experiences to meet academic, intellectual, and social needs of students while maintaining a collaborative learning environment.
- Observe, plan, teach, and assessed students and provide differentiated instruction to best serve varying levels of ability.

A Place for Mom Redondo Beach, CA
Senior Living Sales Advisor December 2015 – Summer 2016

- Effectively managed over 35 new leads per week and continually met monthly quotas.
- Successfully moved families through the sales process converting prospects into senior community move-ins.
- Worked effectively within a CRM system to ensure up-to-date family information, as well as maintain accurate sales forecasts.

Metagenics-Bariatric Advantage Division Aliso Viejo, CA
Territory Manager November 2010 – January 2013

- Professionally represented, educated and trained health care professionals and patients on health products and services while generating business transactions.
- Grew territory by 30% in 12 months.
- Created and implemented 14 new e-stores that led to 12% increase in revenue in 12 months.
- Demonstrated strong ability in working effectively with MD's and surgeons.
- Key opinion leaders commented on exceptional customer service and follow up on meetings and project assignments.
- Successfully met and exceeded sales quotas and maintained a position as one of the top sales performer in the company.
- Led patient health fairs, events, trade shows, and presentations on health and nutrition topics.

JENNIFER PARR

PROFESSIONAL EXPERIENCE

JennParr.com

Redondo Beach, CA

Nutrition/Life Coach

September 2011- September 2016

- Work with clients individually, and conduct workshops and speaking engagements for children and adults.
- Act as a mentor and coach in assisting clients in achieving long-term health and lifestyle goals including stress reduction techniques and much more.

Coastal Web Services

Baltimore, MD

Director of Marketing and Business Development

June 2003 –November 2010

- Managed and created email marketing content, monthly newsletters, and marketing material.
- Presented web design and marketing solutions for 100's of small to medium size businesses.
- Monitored inbound social media activity, and accurately answered customer inquiries in a professional, and timely manner.
- Identified business development and leveraging opportunities and continually met and exceeded monthly sales quotas.

Surf Club

Wilmington, NC

Camp Coordinator

Summer 2006

- Planned and implemented daily activities for children including creative projects, games, and physical activities for children ages 4-12.
- Structured programs based on the needs and interests of the children and their parents while creating and maintaining positive relationships, mentoring and a support system for the children.

CERTIFICATIONS

Holistic Health Coach Certification

Winter 2010 – May 2012

Integrative Nutrition

Licensed vocational school through New York State Department of Education

The State University of New York, Purchase College

Board Certified and Member of American Association of Drugless Practitioners (AADP)

Laughter Yoga Teacher

Spring 2012

Dr. Kataria School of Laughter Yoga

COMMUNITY INVOLVEMENT

Current member of Sierra Club, Friends of the Earth, and attend other local networking groups and events. Active participant of community groups including **volunteer work at the YMCA and A Place Called Home**, a member of the Farm Sanctuary, Sorority Alumni Chapter, and other local organizations that support the environment. Lead a writing group as well called Asheville Writing Collective.

Kaysha Baker

393 Woodlake Drive #31 SLC, UT 84107 • (801) 548-8810 • kamber980@gmail.com

Objective

Task and results oriented, positive, team player with a passion for serving others. Strong ability to work with and lead a team, but capable and confident working unsupervised. Effective at identifying problems, while developing and implementing solutions. 19 years customer service experience, with 1 year of management experience, where I reduced the cost of operations by 35%.

Education

- University of Arkansas Two Semesters
- Prairie Grove High, Prairie Grove, AR Graduated with High Honors - 1998

Experience

- **Darden Restaurants, 2002 - Current**
Customer service in all capacities, hostess, server, and bartending.
 - Greet customers and make them feel welcome.
 - Anticipate guest needs, establish guest connection.
 - Accounts receivables.
- Jones Heating and Air, 2012 – Current
General office cleaning.
- Ace Disposal, 12/2015 - 3/2016
Cleaning multiple office buildings at different locations throughout the valley. Responsible for ordering and maintaining supplies. Laundry service and maintaining employee uniforms.
- **Alano Club, 12/2014 - 5/2015**
Cafe Manager. Responsible for day to day management of the Alano Club Cafe, including employee scheduling, interviewing, hiring, terminating employees, payroll, general H.R. Functions. Managing and maintaining inventory, including ordering all supplies. Accounts payable and accounts receivables. Certified serv safe certification.

Skills – Typing speed 50 WPM, Microsoft office, Excel, Word, and Powerpoint.

Connie R. West

115 Trailwood Drive || Clinton, MS 39056

west.connier@gmail.com

(601)-826-9335

SUMMARY OF QUALIFICATIONS

Dynamic and results-focused professional with 10 years of experience relating to all facets of instructional systems development (ISD); curriculum development; instructional materials development; classroom instruction; classroom management; strategic planning and implementation; and staff mentoring, training, and coaching. Proven ability in technical or administrative work in providing organizational leadership and in formulating innovative strategies to meet goals – directing and coordinating a wide variety of functional areas. Expertise in generating and developing new approaches and concepts in planning long-range programs designed to stimulate advances in coordination achievements. Skilled in analyzing administrative problems, which requires a high degree of independent judgment in the interpretation, application, and enforcement of statutes, rules, regulations, and policies. Experience in planning, developing, evaluating, and administering educational and health and early childhood development education programs – age appropriate curriculum and materials to enhance cognitive, social, physical, and emotional growth.

- **Exceptional Interpersonal and Communication Skills** – Excellent communication and organizational skills. Accustomed to working in fast-paced environments with the key ability to maintain relationships.
- **Work Ethic and Professionalism** – Solid professional standards and an excellent track record of dependability. Maintains a clear focus on achieving organizational results while always ensuring program goals.
- **Problem Solving** – Proven ability to troubleshoot and develop both creative and innovative solutions to institutional challenges; successfully manages change for improved performance and greater efficiency.

PROFESSIONAL EXPERIENCE

Vicksburg Warren School District Central Office Gifted and Special Programs Coordinator

Vicksburg, MS
July 2012 - Present

- Coordinate the screening, identification, placement, and evaluation process of gifted students. Plan in-service training, supervisor for gifted education teachers and other school personnel at the building and district levels.
- Foster the development of higher order thinking skills in all children through coordination opportunities and professional development for teachers (model instruction for gifted and regular classroom teachers).
- Implement district wide professional development. Collect, analyze, evaluate, and maintain student data.
- Coordinate extra curricula activities for teachers of Gifted students. Facilitate family and community involvement in gifted education. Manage established budget for Gifted and Special Program needs.
- Review the work practices of the Gifted and Special Programs; coordinate activities and advise on policy updates.
- Recommend needed regulations, policies, and procedures for proper administration of the program.
- Participate in admin meetings, school board meetings etc. as needed
- District Facilitator and Coach for Leader in Me. Certified through Franklin Covey for District Implementation Levels 1-4.

Vicksburg Warren School District (Bovina Elementary School) Vicksburg, MS

Teacher (Gifted and Talented Education Services (GATES) August 2009 – July 2012

- Developed and/or revised technically accurate course curriculum, lesson plans, training aids, written tests, course materials and course control documents that addressed all aspects of course subject matter.
- Recognized as subject matter specialist expert in the development of learning programs specifically geared for application. Prepared, administered, and graded written and performance examinations.
- Maintained accurate records of student achievement and certified achievement of criterion objectives.
- Remained cognizant of classroom participation and evaluated progress to identify individual improvement.

District Activities and Committees:

- District Facilitator/Coach Leader in Me
- Certification Manager for Warren County Excel by 5
- PreK Coordinator
- Convocation Co-Chair
- Leader In Me Planning Committee Member, 2011
- Yearbook Sponsor and Editor, 2009-present
- Promote the Vote Coordinator, 2011

Funtime Preschool**Clinton, MS****Daycare Teacher****August 2005 – August 2007**

- Developed and implemented age appropriate curriculum, materials, and recreational activities to enhance the cognitive, social, physical, and emotional development of children ages 2-3 years old.
- Collaborated with direct care staff in specific activity plan development, activity individualization, and evaluation of children's developmental progress. Revised curricula to meet children's changing needs.
- Worked with management in the application of thorough environmental and program assessment instruments such as the Early Childhood Environment Rating Scale and child abuse probability assessments.

EDUCATION**William Carey University****Hattiesburg, MS****Doctorate of Educational Leadership****May 2020****Delta State University****Cleveland, MS****Specialist of Education – Major: Educational Leadership****May 2016****Mississippi College****Clinton, MS****Master of Education – Major: Elementary Education****August 2010****Bachelor of Science in Education Major: Elementary Education****May 2009****PROFESSIONAL TRAINING****Leader in Me Facilitator and Coach for District Implementation (2016-present)****Mississippi Association of Gifted Children****Project-Citizen (Community Problem Solving)****Buck Institute-Problem Based Learning 101****Pearson Master Schedule Builder****Positive Behavior Intervention Strategies (PBIS) Workshop****Professional Learning Communities****Differentiated Instruction by Ian Byrd****Super Six Comprehension Skills by Lori Oskus****Kagan Cooperative Learning Training****“Worksheets Don’t Grow Dendrites” by Dr. Marcia Tate****Will to Lead, Skill to Teach by Anthony Muhammed****The Flippen Group-“Capturing Kids Hearts”****MDE Literacy Coach Training****MS Technology Camp****Making Connections****AFFILIATIONS****Past-President, Mississippi Association of Gifted Children, 2019-present****Member, National Association of Gifted Children, 2012-present****Member, Mississippi Association of Gifted Children, 2010-present; Board member, 2011-present****City of Clinton American Cancer Society Planning Committee Fundraising Co-chair****Warren County Excel by Five Certification Manager****2015 MDE Gifted Work Group****Clinton Junior Civic League Member, 2018-present, President, 2021****Junior League of Jackson, Member 2021-present**

REFERENCES

Paula Johnson- Principal, St. Frances Xavier Catholic School
Pjoh1127@aol.com, 713.201.3980

Shaquita Burke- Business Office Contract Consultant, Mississippi Department of Education
Shawin929@gmail, 601.918.5670

Zelda Thuha, Teacher of the Gifted, Vicksburg Warren School District
Misszzd6@gmail.com, 601.218.4527

PART III

OVERVIEW

Leader in Me is a PreK - Grade 12 whole-school improvement model being implemented across the nation and in over 80 countries worldwide. *Leader in Me* is the foundational operating system for schools since it creates an environment in which existing programs and initiatives can thrive. The *LiM* process and program was created by educators for educators.

ELEMENTARY SCHOOL (PreK-6)

Educating the Whole Child

Establish a whole-child mindset with a belief that every child has genius and everyone can be a leader.

MIDDLE SCHOOL (6-9)

Addressing Social-Emotional Needs

Create an environment of social-emotional learning to help students build confidence and discover their true potential.

HIGH SCHOOL (9-12)

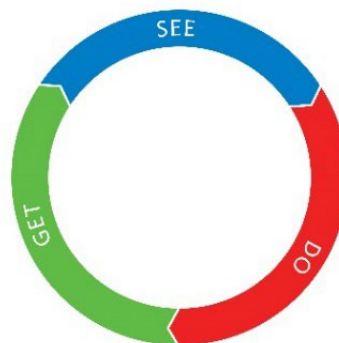
College, Career, and Life Readiness

Create a culture led by students who are encouraged to find their voice and develop critical skills to help them successfully navigate college, career, and life.

FRAMEWORK

The *Leader in Me* model influences leadership, culture, and academics by using the See-Do-Get Cycle. When you change the way you see things, it influences what you do, and the results you get.

By seeing things differently (Core Paradigms) and focusing on highly effective practices, which are outlined below in the *LiM* Framework, schools get measurable results in Leadership, Culture, and Academics. It is through this Framework that the *LiM* process will provide the operating system to help districts and schools accomplish their unique mission and vision for student education.



Leader in Me Core workshops are facilitated during the first three years of implementation to provide consistent *Leader in Me* professional development to create sustainable change. The content for the Core trainings combines elements of all three columns in the *Leader in Me* Framework - Leadership, Culture, and Academics.



SEE Core Paradigms	Paradigm of Leadership	Paradigm of Potential	Paradigm of Change	Paradigm of Motivation	Paradigm of Education
	Everyone can be a leader.	Everyone has genius.	Change starts with me.	Empower students to lead their own learning.	Educators and families partner to develop the whole person.
DO Highly Effective Practices	Leadership	Culture	Academics		
	Start With Adults Learning & Modeling <ul style="list-style-type: none"> Principal & Coordinator Development New & Ongoing Staff Learning Family & Community Partnerships Teach Students to Lead <ul style="list-style-type: none"> Direct Lessons Integrated Approaches Service Learning 	Create a Leadership Environment <ul style="list-style-type: none"> Physical Environment Social-Emotional Environment Leadership Events Share Leadership <ul style="list-style-type: none"> Lighthouse & Action Teams Leadership Roles Student Voice 	Achieve Goals <ul style="list-style-type: none"> Individual Goals Team Goals Aligned School Goals Empower Learners <ul style="list-style-type: none"> Leadership Portfolios Student-Led Conferences Empowering Instruction 		
GET Measurable Results	Highly effective students and adults who are leaders in their school and community.	A high-trust school culture where every person's voice is heard and their potential is affirmed.	Engaged students who are equipped to achieve and entrusted to lead their own learning.		

5 CORE PARADIGMS

Educators begin to see their role, student potential, and the purpose of school culture in new ways as a result of the 5 Core Paradigms. So much of the *Leader in Me* experience starts with a whole new paradigm for education. Educators often rediscover their passion for teaching through *Leader in Me* because the process redirects the focus of educators back to a deeper understanding of student achievement.

Paradigm of Leadership	Paradigm of Potential	Paradigm of Change	Paradigm of Motivation	Paradigm of Education
Everyone can be a leader.	Everyone has genius.	Change starts with me.	Empower students to lead their own learning.	Educators and families partner to develop the whole person.

TEACH LEADERSHIP PRINCIPLES

Professional Learning

Returning staff members develop as leaders through ongoing staff learning around the *7 Habits®* and highly effective practices while new staff members engage in training and mentoring. The principal and school administration team develop as leaders while simultaneously championing leadership for the entire school.

Student Learning

The *7 Habits®* and leadership principles are effectively taught to all students through direct lessons, integrated approaches, and staff modeling. Students develop the ability to think critically about and apply leadership principles.

Family Learning

Families partner with the school by learning about the *7 Habits®* and leadership principles through effective communication and mutual respect. The school provides resources and training. Students are encouraged to *Teach to Learn* with their families.

CREATE A LEADERSHIP CULTURE

Leadership Environment

Students and staff members can see leadership in the physical environment, hear leadership through the common language of the *7 Habits®*, and feel leadership through a culture of caring, relationships, and affirmation.

Shared Leadership

Leadership is shared with students through a variety of leadership roles. Student voice leads to innovations in the school. Lighthouse Teams are active and provide leadership for the school.

Leadership Events

Schoolwide and classroom leadership events provide authentic environments for families and the community to celebrate leadership, build culture, and allow students to practice leadership skills.

ALIGN ACADEMIC SYSTEMS

Schoolwide Goal Achievement

The school utilizes the *4 Disciplines of Execution® (4DX®)* process to identify and track progress on scoreboards toward aligned Wildly Important Goals® (WIGs®) for the school, team/classroom, and staff.

Student-led Achievement

Students lead their own learning by applying newly acquired skills to assess their individual needs, set appropriate goals, and carry out action plans. Students are empowered through the use of Leadership Notebooks® and Student-Led Conferences to reflect on progress toward goals.

Empowering Instruction

Teachers use instructional methods designed to empower students to lead their own learning. Building trusting relationships, engaging in student-led learning, and utilizing collaborative planning and reflection combine to create learning environments which are highly engaging.

STUDENT LEADERSHIP PORTRAIT™

The *Student Leadership Portrait*™ outlines the specific skills and competencies student leaders are expected to develop through *Leader in Me*, so they can thrive in the 21st century. At the heart of the portrait is the whole person, including the heart, spirit, body, and mind. Students then develop skills which lead to personal effectiveness (self-regulation, time management, vision, and higher-order thinking) and interpersonal effectiveness (relationship building, empathy, communication, and collaboration).

When those skills are mastered, students begin to fully lead themselves by developing strengths, actively contributing, achieving goals, and continuously improving. Students also begin to lead others by cultivating trust, sharing purpose, aligning teams, and empowering potential.



EVIDENCE-BASED RESULTS

Leader in Me is an improvement model designed to create change across a wide variety of areas. Consequently, research regarding the *Leader in Me* reveals a wide variety of impact.


To date, over 30 independent academic-research studies have evaluated *Leader in Me* effectiveness. A full range of experimental methods have been used—from quantitative analysis of statewide data, to qualitative studies that analyzed interview data from dozens of educators, families, and students. In addition, nearly all of the studies were reviewed by a peer or academic advisory group before release, and all studies were conducted independent of FranklinCovey.

The academic studies were conducted by the following colleges and universities (number of studies):

- | | |
|------------------------------------|---|
| • Arizona State University (1) | • Texas A&M (1) |
| • California State University (1) | • University of Alberta (2) |
| • Capella University (2) | • University of Louisiana Lafayette (2) |
| • College of St. Rose (1) | • University of Michigan (2) |
| • Dordt College (1) | • University of Missouri (1) |
| • Eötvös Loránd University (1) | • University of North Florida (2) |
| • Gardner-Webb University (1) | • University of Northern Iowa (2) |
| • Johns Hopkins University (2) | • University of Pécs (1) |
| • Lamar University (1) | • University of S. Mississippi (1) |
| • Missouri Baptist University (1) | • Virginia Commonwealth University (1) |
| • NW Missouri State University (1) | • Walden University (1) |
| • St. John's University (1) | • Wingate University (1) |

In addition to these academic research studies, FranklinCovey Education invests in quality research groups to provide data-informed decision making to boost the continual improvement of our training, implementation, and ongoing support to our community of schools. Together, these complementary approaches created a broad range of research outcomes showing consistently positive results for *Leader in Me*.

The body of research reveals evidence of the quantifiable impact *Leader in Me* can have on schools, creating the conditions which drive results in the leadership, culture, and academics. The key research findings are outlined in the following table:

LEADERSHIP	CULTURE	ACADEMICS
<p>Student Behavior Positively impact students' behavior.</p> <p>Staff Social-Emotional Teaching Readiness Develop the personal and professional capacity of teachers and staff, allowing them to confidently teach and model social-emotional leadership skills.</p> <p>Student Leadership Help students develop the mindsets, behaviors, and skills to be effective lifelong leaders.</p> <p>Family Involvement Provide students' families with information, training, and school resources, empowering them to be supportive partners in the development of their child's social-emotional learning.</p>	<p>Attendance Create a school culture where students and staff feel safe and valued.</p> <p>Supportive School Environment Engage student learning and positively support the development of student social-emotional leadership skills.</p> <p>Student Engagement Help students feel emotionally safe, socially supported, and academically challenged.</p> <p>Staff Satisfaction Empower teachers with meaningful leadership opportunities and expert support to guide the social, emotional, and academic development of their students.</p>	<p>Reading/Math Proficiency Help students and staff build the skills and competencies necessary for student achievement.</p> <p>Teaching Efficacy Prepare and support teachers to create goal-centered, student-led classrooms that empower students to lead their own learning.</p> <p>Student-Led Achievement Inspire students with the mindset, skills, and supportive environment they need to lead their academic achievement.</p> <div data-bbox="1047 1066 1399 1150">  For more information on evidence-based research, visit www.LeaderinMe.com. </div>

CASEL ENDORSEMENT

The Collaborative for Academic, Social, and Emotional Learning (CASEL) is a renowned authority on the promotion and practice of social and emotional skills. In particular, its work promotes the integration of academic, social, and emotional learning for students from pre-K through grade 12. Through CASEL's collaborative work with researchers and educators, CASEL has identified five core social-emotional learning competencies: self-awareness, self-management, social awareness, relationship skills, and responsible decision-making.

The skills of social and emotional learning (SEL) are foundational to a successful life and career. When these skills are applied in social contexts, they promote successful self-management, communication, collaboration, and meaningful high-trust relationships. When applied in educational settings, social and emotional skills strengthen academic learning by developing vital skills such as responsibility, resilience, focus, goal-setting, prioritization, empathy, communication, collaboration, and motivation.

The end in mind is to develop leadership competence in students, starting with Leading Self then Leading Others.

SOCIAL-EMOTIONAL LEARNING PROCESS

Leader in Me is endorsed by CASEL as an evidence-based social-emotional learning process (K-6). *Leader in Me* helps schools prepare students with the college-, career-, and life-readiness skills necessary to thrive in the 21st century, including:

Critical Thinking Creativity Self-Discipline Vision Initiative Communication	Relationship Building Goal Achievement Public Speaking Global Awareness Emotional Control Teamwork	Listening Skills Time Management Leading Projects Self-Directed Learning Valuing Diversity Problem Solving
---	---	---

In addition, *Leader in Me* high school students develop essential skills, like:

College Preparation Study Skills	Interview Skills Presentation Skills	Resumé Writing Leading Work Teams
-------------------------------------	---	--------------------------------------

The *Student Leadership Portrait*™

Through the implementation of *Leader in Me*, students develop skills which lead to personal effectiveness (self-regulation, time management, vision, and higher-order thinking) and interpersonal effectiveness (relationship building, empathy, communication, and collaboration).

Students begin to fully lead themselves by developing strengths, actively contributing, achieving goals, and continuously improving. Students also begin to lead others by cultivating trust, sharing purpose, aligning teams, and empowering potential. Woven into the domains of the Student Leadership Portrait are the *7 Habits*®.

Personal Effectiveness/Lead Self

Habit 1: Be Proactive®

Habit 2: Begin with the End in Mind®

Habit 3: Put First Things First®

Interpersonal Effectiveness/Lead Others

Habit 4: Think Win-Win®

Habit 5: Seek First to Understand, Then to Be Understood®

Habit 6: Synergize®

Whole Person

Habit 7: Sharpen the Saw®

As students develop SEL competencies aligned to each of the *7 Habits*®, their ability to apply the habits both within and outside of the academic setting expands. When the *7 Habits*® are integrated into an empowering school environment (physical and emotional), and are combined with student voice, student choice, and student-led learning, leadership competencies transform into lifelong skills for success. This further development is represented in the *Leading Self* and *Leading Others* domains.

In the table which follows, the definition of each CASEL competency is aligned to the expected outcome of its corresponding *Leader in Me* competency.



CASEL 5 Core Competencies	<i>Leader in Me</i> Personal and Interpersonal Effectiveness Competencies
Self-Awareness “The abilities to understand one’s own emotions, thoughts, and values and how they influence behavior across contexts. This includes capacities to recognize one’s strengths and limitations with a well-grounded sense of confidence and purpose.”	Vision & Self-Discipline Students are able to: <ul style="list-style-type: none"> ● Think ahead about consequences of actions/choices before acting. ● Understand how goal setting applies at school and in one’s personal lives. ● Learn how to set meaningful goals and make plans. ● Set clear expectations for themselves and others. ● Create a personal mission statement to define meaning and purpose in their life, and who they want to become.
Self-Management “The abilities to manage one’s emotions, thoughts, and behaviors effectively in different situations and to achieve goals and aspirations. This includes the capacities to delay gratification, manage stress, and feel motivation & agency to accomplish personal/collective goals.”	Self-Discipline & Vision Students are able to: <ul style="list-style-type: none"> ● Develop responsibility for their actions, emotions, attitudes, choices, and behaviors. ● Understand and apply the concept “Choose Your Own Weather,” (choose your feelings, and responses). ● Stop and think before acting. ● Identify the difference between Proactive vs. Reactive Language—and use Proactive Language. ● Focus thinking and behaviors on things they can control vs. things one can’t control (Circles of Control/No Control) ● Become a Transition Person—take negative things that happen, and turn them into something positive; and help build others by being a positive example.
Responsible Decision Making “The abilities to make caring and constructive choices about personal behavior and social interactions across diverse situations. This includes the capacities to consider ethical standards and safety concerns, and to evaluate the benefits and consequences of various actions for personal, social, and collective well-being.”	Initiative Students are able to: <ul style="list-style-type: none"> ● Identify what is most important (priority Big Rocks) at school and at home. ● Identify what is least important and distractions that can take them off track. ● Learn the Time Matrix to learn how to say “no” to distractions or unimportant things, and say “yes” to the important ● Do weekly planning around priorities to get important things done first e.g. doing homework, turning in assignments on time, being prepared for dance class, studying for tests, etc. ● Understand roles and goals, and how to plan around those to create balance and meaning. ● Live the classroom mission statement and contribute to positive outcomes in class. ● Live their personal mission statement, and become who they want to be.
Relationship Skills “The abilities to establish and maintain healthy and supportive relationships and to effectively navigate settings with diverse individuals and groups. This includes the capacities to communicate clearly, listen actively, cooperate, work collaboratively to problem solve and negotiate conflict constructively, navigate settings with differing social and cultural demands and opportunities, provide leadership, and seek or offer help when needed.”	Relationship Building Students are able to: <ul style="list-style-type: none"> ● Understand the meaning of abundance and scarcity thinking and behaviors. ● Build trust and strong Emotional Bank Accounts in relationships. ● Appreciate differences and respect others. ● Get along well with others and solve problems in mutual beneficial ways. ● Cooperate with others to find Win-Win solutions and create Win-Win Agreements.
Social-Awareness “The abilities to understand the perspectives of and empathize with others, including those from diverse backgrounds, cultures, & contexts. This includes the capacities to feel compassion for others, understand broader historical and social norms for behavior in different settings, and recognize family, school, and community resources and supports.”	Communication Students are able to: <ul style="list-style-type: none"> ● Use attentive listening by using eyes, ears, and heart to understand others. ● Be open to others without pre-judgment. ● Build high trust with others by communicating honestly. ● Use “I” messages to effectively express thoughts and feelings. ● Solve problems or conflicts by using a Talking Stick to listen first, then talk. ● Learn how to do public speaking with confidence. Collaboration Students are able to: <ul style="list-style-type: none"> ● Celebrate differences as strengths and optimize those strengths to accomplish group goals. ● Be humble and open to new ideas, and involve others. ● Work well in teams by listening, brainstorming ideas, and learning from each team member. ● Seek creative solutions by combining diverse ideas to create “3rd Alternatives” or new and better ideas. ● Overcome behaviors that get in the way of teamwork and creative collaboration.

IMPLEMENTATION OPTIONS

We offer three ways for a district-wide implementation that allow the district to choose which implementation method best meets your needs. Our coaches will work closely with district and school level leaders to design an implementation plan that will help each school achieve their desired outcomes. We offer a cohesive approach for grades PreK-12.

District-led implementation empowers district leaders through greater ownership, scalability, and flexibility, while preserving the FranklinCovey global standard of quality.

FRANKLINCOVEY COACH-LED

FranklinCovey will deliver the onsite training workshops and coaching to your schools.

DISTRICT COACH CERTIFICATION AND DEVELOPMENT (Train-the-Trainer)

1-3 members of your district staff will be certified to deliver onsite workshops and coaching to your schools. They will receive annual certification in progressive parts of Leader in Me and will receive annual coaching and consulting skill development from FranklinCovey's expert coaches.

District Coach Certification and Development Support

- Regional or Onsite Certification in Facilitation and Coaching
- Mentor Support Calls
- Optional Shadow and Debrief Days

SCHOOL SELF-IMPLEMENTATION

School Self-Implementation* is available for well-prepared schools to help districts implement Leader in Me at scale, while maintaining quality standards. **available for elementary and middle schools only.*

Select staff members at each school will be certified online to deliver blended learning in their school, augmented by self-paced online learning for all staff members.

The district wide process map can be viewed on the next page.

Leader in Me Process



ANNUAL MEMBERSHIP

Membership equips educators with essential tools and resources necessary to transform their schools and connects them to a global community of innovative educators. It also provides *Leader in Me* Schools with a license to proprietary content and valuable resources that ensure every school can experience optimal results. Ongoing, annual membership provides schools with support they need to sustain the growth of *Leader in Me* in their buildings. Membership provides them with metrics to track their progress, work with their coach to develop implementation plans each year, and customize their journey. It affords them access to the *Leader in Me* global community of schools and resources provided on *Leader in Me* Online. In addition, there is live regional training each year for the principals and Lighthouse Coordinators to ensure they are supported through every phase of implementation and that momentum continues.

The chart below outlines what is included in each of the annual memberships:

ANNUAL DISTRICT MEMBERSHIP

- District Design Session
- Coaching Services
- Online District Portal

ANNUAL SCHOOL MEMBERSHIP

- Coaching Services
- Award-Winning Video Library
- Online Professional Learning
- Online Classroom and Student Resources
- Measurable Results Assessment (MRA)

PRODUCTS AND SERVICES

FranklinCovey Education will provide comprehensive *Leader in Me* Social and Emotional Learning Products and Services which include the following components:

Professional Learning and Development

- Learn the 7 *Habits*® and all aspects of *Leader in Me* through process implementation.
- Access world-class leadership development courses and modules delivered in multiple modalities: live, live online, or on-demand.

Coaching

- Receive ongoing support for the district and/or schools to achieve measurable results.
- Engage in deep learning about each part of *Leader in Me*, access tools to put the learning into practice, and have time to reflect on results in a cycle of continuous learning and improvement.

Curriculum and Materials

- Explore comprehensive curriculum with robust resources for students in PreK through grade 12.

Leader in Me Online

- An online hub for the services, tools, and resources accessible by school and district staff.
- Resource library containing thousands of schoolwide and classroom resources to help teach leadership, build culture, and improve academics (videos, articles, podcasts, and lesson plans).
- *Leader in Me* Weekly subscription - email newsletter delivering bite-size learning on relevant and current topics in video, article, and printable tool formats. Monthly special editions for principals and for staff members who coordinate *Leader in Me* implementation.
- Embed resource feature - functionality which allows the extensive *Leader in Me* library of digital resources to be shared with students and parents at home using the learning management system or class website tools already used at each school.

Assessment Tools

- Schoolwide Measurable Results Assessment tool for measuring teacher, staff, student, and parent SEL.

IP Rights

- Rights to create derivative works using FranklinCovey intellectual property for hallways, lesson plans, curricula, and so forth.

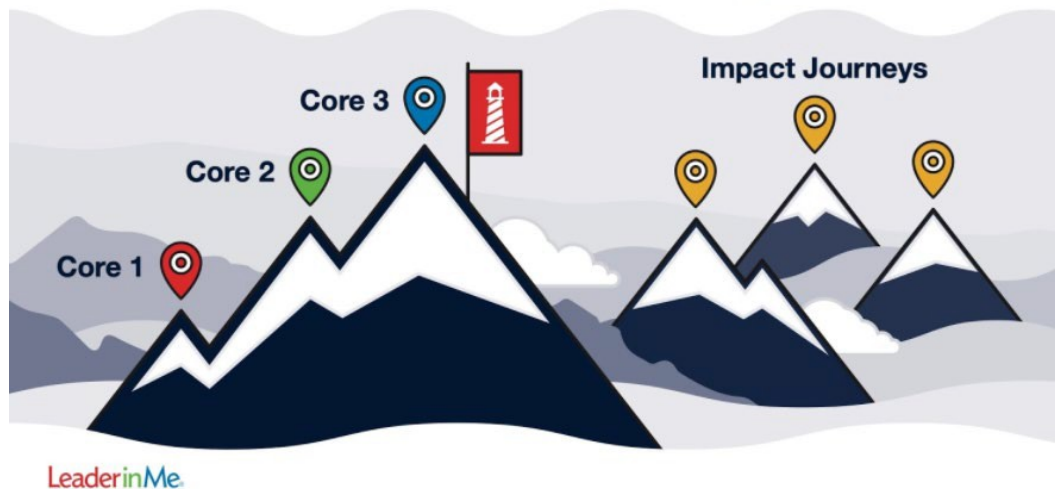
6 Factors Which Differentiate *Leader in Me*

1. **World class branded content.** FranklinCovey has proven, world-renowned, research-based content, including *The 7 Habits of Highly Effective People®*, *The Speed of Trust®*, *The 4 Disciplines of Execution®*, Unconscious Bias, and more.
2. **Evidence-based impact.** *Leader in Me* is CASEL endorsed and has more than 40 empirical studies demonstrating the efficacy and impact of *Leader in Me* on measures such as behavior, attendance, engagement, and academic achievement.
3. **Student and Adult SEL.** *Leader in Me* follows an inside-out approach starting with teaching SEL to faculty and staff, followed by taking SEL to students, followed by connecting with parents.
4. **Global reach.** *Leader in Me* is a universal and established school improvement solution used in over 4,500 schools in more than 50 countries.
5. **Deep resources.** *Leader in Me* is part of the FranklinCovey global organization which has unparalleled expertise, resources, and intellectual property.
6. **Education expertise.** Our large and experienced cadre of education coaches and consultants are carefully selected and trained. Combined, they have over 1,000 years of classroom and administrative experience.

PROFESSIONAL DEVELOPMENT

From a Professional Development perspective, *Leader in Me* installation is a 3-year journey (as illustrated in the *Leader in Me Journey Map*) involving an annual membership, Core 1 Training in Year 1, Core 2 Training in Year 2, and Core 3 Training in Year 3. Once the initial installation is complete, schools use data to select from a variety of Impact Journeys trainings, covering various themes such as: (a) Empowering Instruction, (b) Academics 1, (c) Academics 2, (d) Equity in Education, (e) Family Engagement, (f) Learning Recovery, and (g) Neuroscience-backed Wellness. Delivery modalities include live, live online or on demand. Each of the Core Trainings deepens participants' knowledge and skills to develop a thriving school culture comprised of highly effective people at every level.

Leader in Me Journey Map



Leader in Me Process Map



WORKSHOP COMPONENTS

CORE 1

LIGHTHOUSE TEAM TRAINING

- First 2 hours: Principal and Lighthouse Coordinators
- Next 4 hours: Principal and full Lighthouse Team

End in Mind

The Lighthouse Team will be able to use the principles and practices of *Leader in Me* as a whole-school improvement process to get results.

Learning Targets

This workshop will prepare educators to:

- Design their leadership school using the foundational structures of *Leader in Me*.
- Embrace essential leadership skills to be an effective Lighthouse Team member.
- Use foundational structures and essential leadership skills to implement *Leader in Me*.

ALL STAFF TRAINING

- Full Staff

End in Mind

Staff will be able to design a leadership school by applying the practices of *Leader in Me*.

Learning Targets

This workshop will prepare educators to:

First half of day:

- Teach *The 7 Habits®* through modeling and direct lessons.
- Engage student voice in establishing a mission statement and leadership roles.
- Create a leadership environment to communicate students' worth and potential.

Second half of day:

- Engage with families in designing a leadership school.

CORE 2

LIGHTHOUSE TEAM TRAINING

- First 2 hours: Principal and Lighthouse Coordinators
- Next 4 hours: Principal and full Lighthouse Team

End in Mind

The Lighthouse Team will be able to use the principles and practices of *Leader in Me* as a whole-school improvement process to get measurable results.

Learning Targets

This workshop will prepare educators to:

- Design their leadership school using the foundational structures of *Leader in Me*.
- Embrace essential leadership skills to be an effective Lighthouse Team member.
- Use foundational structures and essential leadership skills to implement *Leader in Me*.

ALL STAFF TRAINING

- Full Staff

End in Mind

Staff will be able to empower students to achieve growth by applying the practices of *Leader in Me* improvement process to get results.

Learning Targets

This workshop will prepare educators to:

- Build students' skill set by integrating the highly effective practices of *The 7 Habits®*.
- Use *The 4 Disciplines of Execution®* to help students achieve academic growth.
- Implement a tool that empowers student to own their learning and growth.

CORE 3

LIGHTHOUSE TEAM TRAINING

- First 2 hours: Principal and Lighthouse Coordinators
- Next 4 hours: Principal and full Lighthouse Team

End in Mind

The Lighthouse Team will increase the capacity of the full staff around the *Leader in Me* implementation process.

Learning Targets

This workshop will prepare educators to:

- Use the foundational structures and essential leadership skills to fully integrate *Leader in Me*.
- Use their schoolwide data and the foundational structures of *Leader in Me* to develop life-ready leaders.
- Maximize essential leadership skills to be an effective Lighthouse Team member.

ALL STAFF TRAINING

- Full Staff

End in Mind

Staff will be able to use the principles and practices of *Leader in Me* as a whole-school improvement process to get results.

Learning Targets

This workshop will prepare educators to:

- Empower students to engage in a Student-Led conference.
- Inspire student leadership through Service Learning.
- Prepare life-ready leaders with The 8th Habit.

The 7 Habits of Highly Effective People® Signature Edition 4.0

- Full Staff

Introduced in Core 1 and woven throughout the installation of *Leader in Me* are *The 7 Habits of Highly Effective People*®.

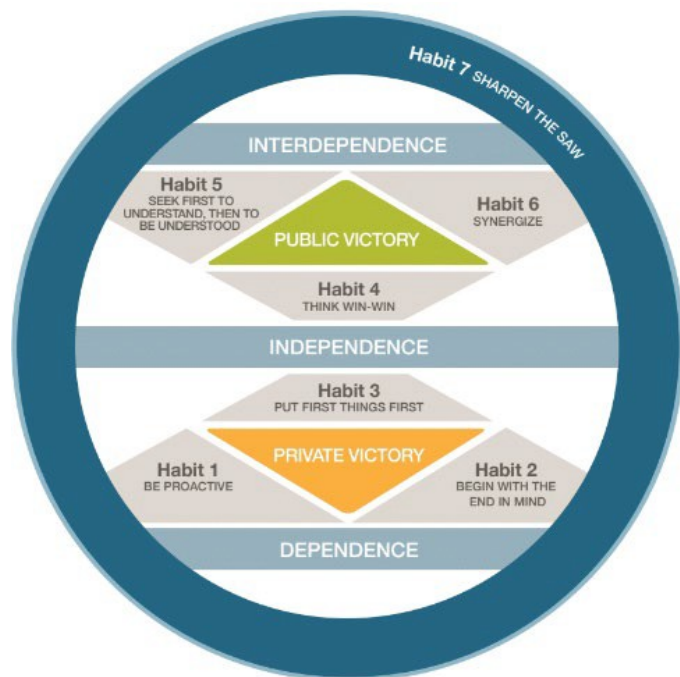
Schoolwide implementation of *Leader in Me* begins with leading the full staff – non-instructional, instructional, and administrative - through *The 7 Habits of Highly Effective People*® Signature Edition 4.0 training. This professional development workshop aligns timeless principles of effectiveness with modern technology and practices. People's sustained and lasting success can only occur when they learn how to lead themselves; influence, engage, and collaborate with others; and continuously improve and renew their capabilities. These elements are at the heart of individual, team, and organizational effectiveness.

Individual Effectiveness:

- Develop increased maturity, greater productivity, and the ability to self-manage.
- Execute critical priorities with laser-like focus and careful planning.

Team Effectiveness:

- Increase team engagement, morale, and collaboration.
- Improve communication skills and strengthen relationships.



Organizational Effectiveness:

- Create a framework for developing core values and creating a highly effective culture.
- Develop current and aspiring leaders who model both competence and character.

WORKSHOP OUTCOMES

Assess Paradigms and Principles of Effectiveness:

• 01 | BE PROACTIVE

Assume responsibility, focus, and act on what can be controlled and influenced, instead of what can't.

• 02 | BEGIN WITH THE END IN MIND

Define clear measures of success and create a plan to achieve them for both life and work.

• 03 | PUT FIRST THINGS FIRST

Prioritize and achieve the most important goals instead of constantly reacting to urgencies.

• 04 | THINK WIN-WIN

Collaborate more effectively with others by building high-trust relationships of mutual benefit.

• 05 | SEEK FIRST TO UNDERSTAND, THEN TO BE UNDERSTOOD

Influence others by developing a deep understanding of their needs and perspectives.

• 06 | SYNERGIZE

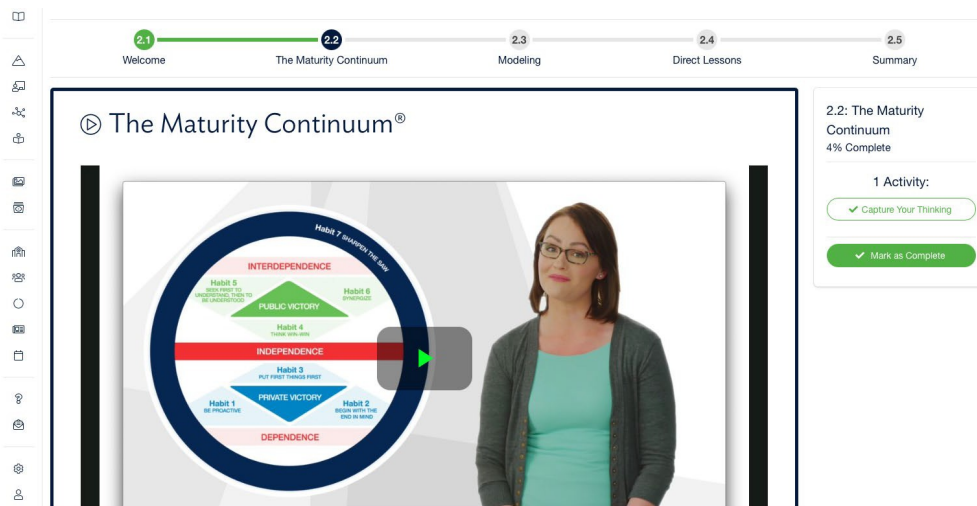
Develop innovative solutions that leverage diversity and satisfy all key stakeholders.

• 07 | SHARPEN THE SAW

Increase motivation, energy, and work/life balance by making time for renewal activities.

On Demand Virtual Professional Learning and Development

The 7 Habits of Highly Effective People and the *Leader in Me* process can be learned online through On Demand modules. These modules feature the same award-winning video and other content as our live and live online workshops with activities adapted for the on-demand modality. Additional “host” videos help orient and guide the learner. Notes and action plans can be captured directly on the *Leader in Me* Online portal and associated with the users’ accounts.



Workshop Companion Resources accompany each on-demand module and connect the learner to the tools needed to implement the learning.

Workshop Companion Resources

Teaching the 7 Habits



Tailored Lessons in Leadership for Special Ed Students

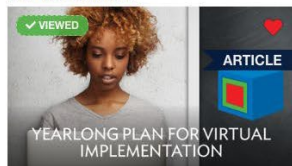


Somewhere and Everywhere: Teaching Leadership



Leadership Guides: Pass It On

LEAD Journals



Yearlong Plan for Virtual Implementation



Level 9



Level 8



Level 7

In addition to the online learning, staff discussions are interspersed throughout the process. These discussions are led by a staff member designated as the Adult Learning Coordinator at each school. Discussion guides and other resources are provided to support the Adult Learning Coordinator in facilitating a blended learning experience.

For district staff and administrators, world class leadership development courses are provided in addition to the *Leader in Me* workshops. Workshop titles include:

- *The 4 Essential Roles of Leadership*
- *The Speed of Trust*
- *Unconscious Bias*
- *Principal's Academy*

COACHING SERVICES

Each school and/or district receives ongoing support to help achieve measurable results each school year by aligning their most important initiatives to the *Leader in Me* Framework. The designated coach will connect with the staff to share in deep learning about each part of *Leader in Me*, equip staff with the tools to put the learning into practice, and allow time for the staff to reflect on results in a cycle of continuous learning and improvement. With annual membership and/or the purchase of a coaching package, the schools and/or district will receive an assigned coach to address topics and provide support in the areas most needed. The research clearly demonstrates job-embedded coaching is the best method to ensure that theory turns into practice.

FOCUS ON MEASURABLE RESULTS

Coaching helps cut through the clutter and achieve transformational results by partnering with staff to focus on some of the most challenging issues educators face today. Below are a few of the measurable results targeted through coaching.

IMPLEMENT A STRATEGIC PLAN

After identifying a new goal, a coach will support the implementation of highly effective practices based on powerful core paradigms.

ONSITE COACHING DAYS

Onsite coaching is an invaluable resource to assist with *Leader in Me* implementation at the school or district. Onsite coaching days are offered live or live online via an interactive platform.

The *Leader in Me* coach will provide support, collaboration, and feedback to help each school:

- Gain an external perspective regarding the school's challenges and opportunities.
- Identify adjustments to each school's implementation of *Leader in Me*.
- Establish specific action steps, timelines, and resources to elevate achievement.
- Understand the needs of teachers through classroom visits and observations.
- Develop staff leadership and build capacity in Lighthouse Team members.
- Provide ongoing virtual coaching support to address challenges as they arise.

CURRICULUM AND MATERIALS

Pre-K through Grade 12 Curriculum

The world-class adult SEL and leadership learning is mirrored by a robust SEL and leadership curriculum for students.

Curriculum for Pre-K

Leader in Me Social-Emotional Learning: Self-Awareness and Self-Regulation for Preschool Leaders

- Nine week curriculum is comprised of forty-five 15-minute learning experiences designed for 4- and 5-year-old leaders. The curriculum includes associated printables including resources which could be displayed in the classroom such as the Pause Plan poster – (Notice-Name-Think)
- The three core outcomes are:
 - Students will be able to recognize, name, and describe the characteristics of core emotions.
 - Students will be able to explain and demonstrate the Pause Plan (Notice, Name, Think) to regulate their emotions.
 - Students will be able to explain and demonstrate effective self-regulating (“calm-down”) strategies.
- The curriculum includes additional resources:
 - “Emotions at Home” component, which is a key piece to be sent to parents/caregivers at the end of each of the 9 weeks to support emotion recognition and regulation at home
 - Emotion Cards – picture and name of core emotions – 6 + calm
 - Happy, sad, mad, scared, disappointed, surprised, calm
 - Calm-Down Cards – 2 sets – outlining key emotion regulation strategies
 - Recommended Puppet set and a box set of *The 7 Habits of Happy Kids* books

Leadership Guides for Grades K-6

Student and Teacher guides are accessible in digital or print format and include:

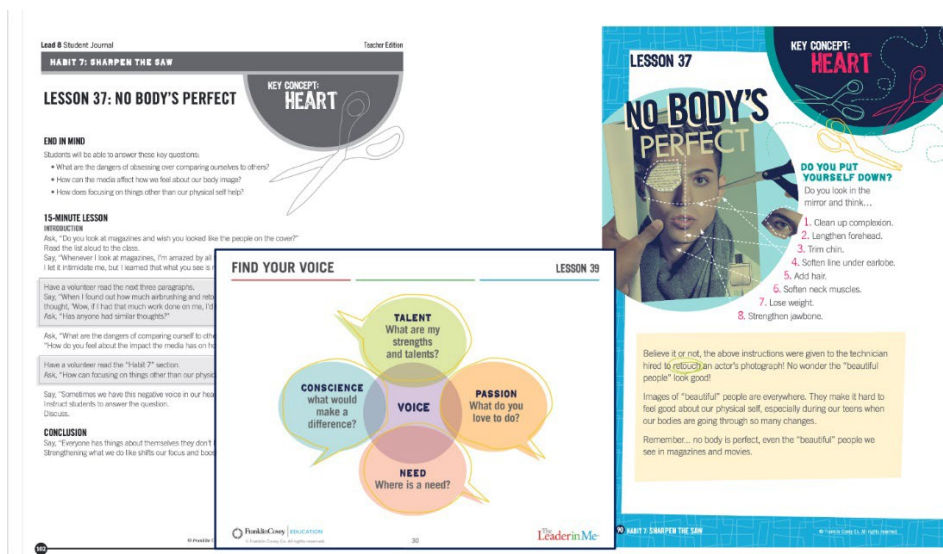
- 38 key concepts across four broad sections:
 - Creating a Leadership Classroom
 - Leading Self (Habits 1–3)
 - Leading Others (Habits 4–6)
 - More Ways to Lead (Habit 7 and Beyond)
- Main lesson script, accompanying workbook pages, and slide decks for introducing key concepts
- Class and individual application activity recommendations to deepen learning
- Supplemental resources, including formative assessment guidance, differentiation options, and language for sharing leadership learning with families
- Resources available in English and Spanish



LEAD Student Journals for Grades 6-9

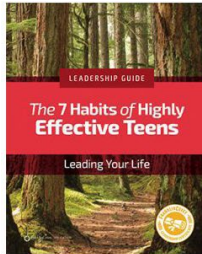
Student and Teacher guides are accessible online or in printed format and include:

- 40 key concepts
- Main lesson script with options for 15-, 30-, or 60-minute delivery
- Accountability *partner checks* incorporated throughout the learning
- Supplemental resources, including ideas for integration with curriculum areas, and language for sharing leadership learning with families
- Slides for class presentation in-person or virtually

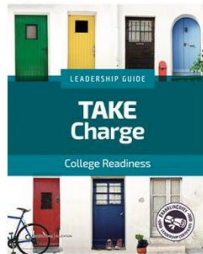


4 High School Courses

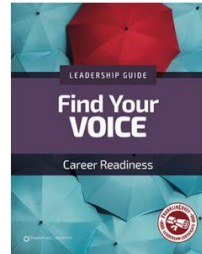
At the high school level 4 robust *Leader in Me* courses prepare students for college, career, leadership and life.



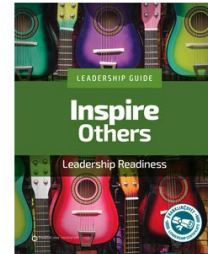
Life Readiness
Course



College Readiness
Course



Career Readiness
Course



Leadership
Readiness Course

Course features include:


- 42 lessons per course
- Full semester course, 40-minute modules, or 20-minute lessons
- Instructor-led, student self-paced, or blended
- High-quality video and interactive learning objects integrated throughout
- Printed copies available

Paradigms: The Key to Change
Principles of Effectiveness / Discussion 4: Paradigms, The Key to Change

Everyone experiences paradigm shifts.

Juan Paulo, a student in Malaybalay City, Philippines, talks about a paradigm shift he experienced.

Watch the following video and think about some of your paradigm shifts.



Discuss...
What is an important paradigm shift that Juan Paulo identified?

PREVIOUS ACTIVITY
SHARE ABOUT A PARADIGM SHIFT

NEXT ACTIVITY
TWO PARADIGMS

Overview of topics addressed in the high school courses:

College Readiness	Career Readiness	Life Readiness	Leadership Readiness
✓ Goal Achievement	✓ Interview Skills	✓ Be Proactive®	✓ The 4 Roles of Great Leaders
✓ College Test Prep	✓ Presentation Skills	✓ Begin With the End in Mind®	✓ Leading Projects
✓ College Applications	✓ Listening Skills	✓ Put First Things First®	✓ Mentoring
✓ Study Skills	✓ Using Feedback	✓ Think Win-Win®	✓ Group Dynamics
✓ Weekly Planning	✓ Emotional Control	✓ Seek First to Understand, Then to Be Understood®	✓ Meeting Management
✓ Financial Literacy	✓ Résumé Writing	✓ Synergize®	✓ Decision Making
✓ Living Away From Home	✓ Digital Etiquette	✓ Sharpen the Saw®	✓ Leading at Home
✓ Roommates	✓ Creativity		✓ Communication
✓ Health and Fitness	✓ Networking		✓ Innovation
			✓ Leading Work Teams

Online Product Details

FranklinCovey has invested more than \$100 million dollars in the creation of its *Leader in Me* products and services since 2007. *Leader in Me* began with schools seeking to solve the complex challenges of addressing both academic and SEL needs of students and staff members. More than just a program, schools need an operating system to prepare students for current challenges and a volatile future by anchoring them in timeless, universal principles of leadership. The *Leader in Me* process requires starting with the adults to make leadership part of the school and community culture. *Leader in Me* serves more than 4,500 schools in 50+ countries in this capacity. After more than a decade developing and delivering world-class workshops and ICF-certified coaching, in-person, FranklinCovey Education has captured the essence of *Leader in Me* into a digital product which includes the following:

Leader in Me Online

Leader in Me Online (www.leaderinme.com) is the digital hub for schools and districts to access a wealth of resources and services. All instructional and non-instructional staff members have access to *Leader in Me Online* with the annual membership. District staff and administrators have access to additional professional learning content.

A core component of *Leader in Me Online* is the Resource Library which contains a wealth of resources for professional learning and classroom instruction including:

- 4,000+ printable tools, templates, lesson aids, and other resources
- 1,200+ videos including:
 - Award-winning short film productions for educators and leaders
 - *The 7 Habits of Happy Kids* animated video series
 - Two video series for elementary grades - *Jenni and Zippy* and *Jenni and Chris*
 - *Max and Holly* video series for upper elementary and middle grades
 - *The 7 Habits with Manny and Clark* video series for high school students
 - Documentary stories of student and school successes
- Resources to support exceptional instructional practices, coordinated culture change, and goal achievement
- Tips for practical classroom implementation of *Leader in Me*
- Inspirational stories and illustrations of effective practices
- Hundreds of articles and stories
- Hundreds of lesson plans, images, and handouts for teachers
- 3 new podcast series:
 - Change Starts Here
 - Realteen Talks
 - The Empowering Teacher

Many resources are organized into featured collections for specific tasks (Getting Started with *Leader in Me* Online, Advisory, Morning Meetings, Daily Routines) or for specific content areas (*The 7 Habits®*, *The 4 Disciplines of Execution®*). Teachers can also create their own collections of resources to share with others.

Certain resources are also available in other languages including Spanish, Chinese, Portuguese, Japanese, Korean, German, Hungarian, Dutch, Czech, Ukrainian, Icelandic, Thai, and Khmer.

Resources can be sorted and filtered by language, level, media type, and four other properties. An advanced search engine provides quick access to relevant content through a dynamic and accessible resource library.

The screenshot displays the Leader in Me Resource Library interface. At the top, there is a search bar with the text "Search the Resource Library..." and a magnifying glass icon. To the right of the search bar, there are language and user icons. Below the search bar, the interface is divided into several sections:

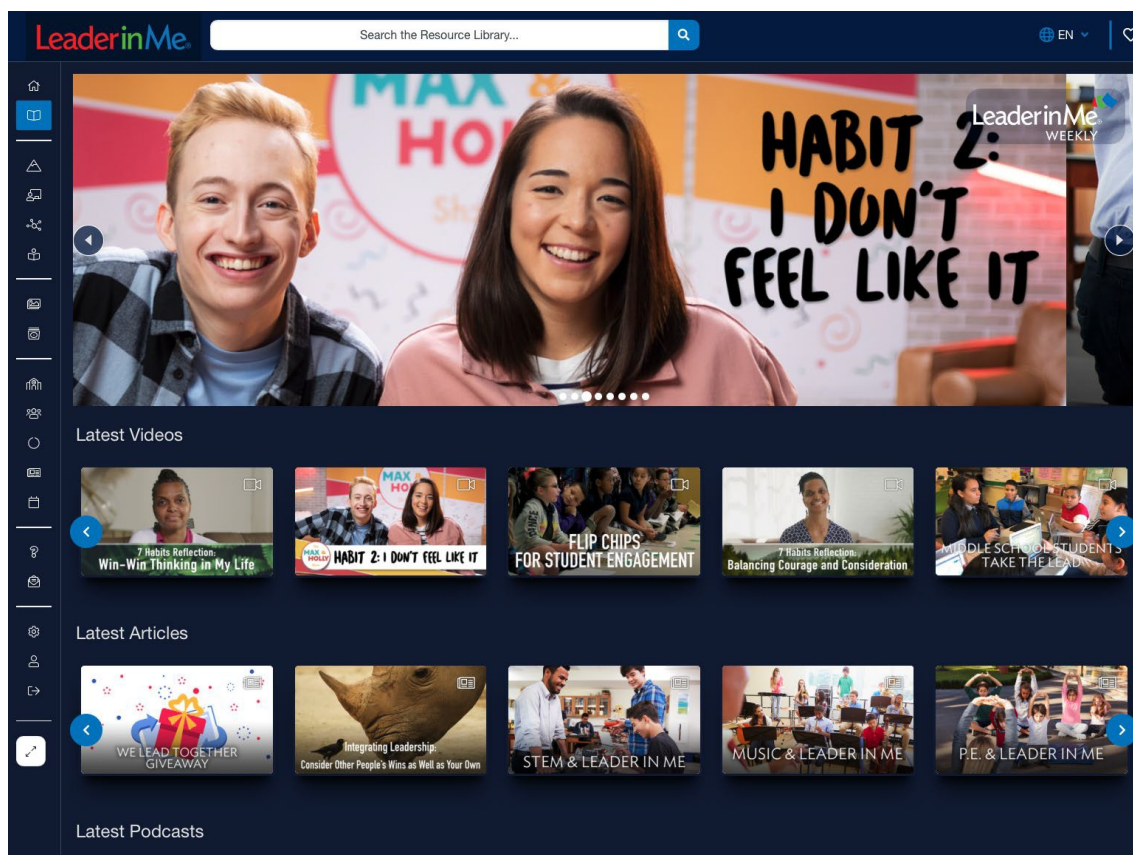
- Featured Collections:** A section on the left side of the interface.
- Language:** A filter section showing "English" with a count of 1351.
- LIM Content:** A filter section showing "7 Habits" with a count of 1351. Below this, there is a list of habits with their respective counts:
 - Habit 1: 109
 - Habit 2: 96
 - Habit 3: 107
 - Habit 4: 107
 - Habit 5: 106
 - Habit 6: 105
 - Habit 7: 105
 - Habit 8: 29
- Resource Types:** A filter section showing:
 - Teacher Guide: 478
 - Student Guide: 401
 - Activity: 90
 - Coaching Resource: 77
 - See More (5)
- Grade Level:** A filter section showing:
 - Kindergarten: 233
 - Level 1: 203
 - Level 2: 213
 - Level 3: 207
 - See More (10)
- Media Type:** A filter section showing:
 - Printable: 1141
 - Video: 135

The main content area displays search results for "Leader in Me". At the top of this area, it says "WE FOUND 1351 RESULTS". Below this, there are several resource cards:

- Action Planning Slides:** A PDF resource showing a circular diagram of the Learning and Implementation Cycle.
- Measurable Results Targeted by Leader in Me:** A PDF resource showing a table of measurable results.
- 4.0 Leader in Me Framework:** A PDF resource showing a table of the 4.0 framework.
- What is The First 8 Days?:** A video resource featuring a woman speaking.
- Habit 2: Goob and the Bug-Collecting Kit:** A video resource featuring a cartoon character named Goob.
- Habit 1: Just The Way I Am:** A video resource featuring a cartoon character named Pokey.
- How Tightly Are You Coiled?:** A PDF resource showing a diagram of a coiled spring.
- Habit 1: Be Proactive:** A video resource featuring a woman speaking.
- 7 x 7 Contract:** A PDF resource showing a contract template.

Leader in Me Weekly

All staff members at *Leader in Me* schools can receive a weekly newsletter called *Leader in Me Weekly*. The newsletter provides practical, tactical, try-it-today resources for applying *Leader in Me* concepts in the real world. Each edition contains a video or podcast episode and a relevant article. Often additional resources are included, such as printable resources, reference tools, and resource bundles targeting specific topics. After publication, content is also available on a dedicated, searchable section of *Leader in Me Online* and can be added to collections.



In addition to the weekly email to all staff, monthly Special Editions are sent to all principals and to all coordinators. Coordinators are staff members who chair the Lighthouse Team. The Lighthouse Team is responsible for coordinating the school's goals and *Leader in Me* implementation. These monthly special editions feature high-



quality, original video which explore topics relevant to the specific roles of principals and coordinators to help build a community of job-alike leaders.

Embed Resource Feature

Many schools have been challenged by the desire to provide great content to students or parents without adding another system. With a *Leader in Me* membership, teachers and administrators can embed resources from *Leader in Me* Online through the currently used learning management system (Canvas, Schoology, etc.) or on class websites (e.g. Google Classroom). The embed feature allows easy and uninterrupted sharing of resources for as long as the school maintains its membership. Students and parents can access the content using the systems schools already have in place, as a result of the embed feature.

At the top of each resource is an embed icon (</>) . Clicking on this icon reveals both an Embed Code and an Embed Link. Teachers can choose which format works best for their platform. Embedding is as simple as clicking the appropriate button to copy the code or link and pasting it into the platform of choice. Each link is unique to both the resource and the school.

Leader in Me Embed

Leader in Me Embed allows you to share Leader in Me content in your own sites.
It is currently in **BETA** and may continue to change as we gather more usage feedback.

Embed Code

Use this in your LMS or sites where you can input HTML (e.g. Canvas, custom sites).

```
<iframe src='https://www.leaderinme.com/embed/lead-your-team-with-effective-feedback?pod=075ae209ef2121201facc8b91ddb6c7c891a4a3483189dd673cb722baae5293f%24%24nnhIZCf7IC4JXjYjRw%3D%3D--GtQdoMRQ1yloEw0J--ySOyBOYYKdoDwUs2uxf8SQ%3D%3D' allow='autoplay; fullscreen' allowfullscreen frameborder='0' height='640' width='640'></iframe>
```

Copy Embed Code

Embed Link

Use this in your LMS or sites that allow you to embed content via a link (e.g. Google Classroom).

```
https://www.leaderinme.com/embed/lead-your-team-with-effective-feedback?pod=075ae209ef2121201facc8b91ddb6c7c891a4a3483189dd673cb722baae5293f%24%24nnhIZCf7IC4JXjYjRw%3D%3D--GtQdoMRQ1yloEw0J--ySOyBOYYKdoDwUs2uxf8SQ%3D%3D
```

Copy Embed Link

ASSESSMENT TOOLS

Leader in Me Measurable Results Assessment (MRA)

The Measurable Results Assessment (MRA) is a rigorously developed tool used to annually collect, analyze, and report student-, staff-, and school-level outcomes related to improving leadership, culture, and academics. The MRA can be used to help a school identify its strengths and weaknesses, develop goal-centered improvement plans, and monitor progress toward school improvement.

To accurately measure progress since implementing the *Leader in Me* process, school stakeholders including staff, students in Grades 4–9, and caregivers complete an assessment prior to the first day of training or implementation. The same school stakeholders retake the assessment during the last three months of the school year to attain summative data.

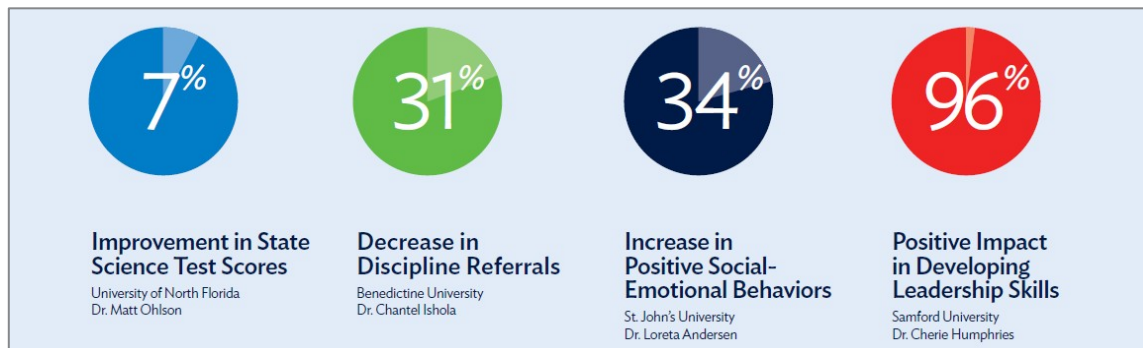
When completing the MRA, staff, students in Grades 4–9, and their caregivers each answer a set of questions which specifically assess their unique perspective and provide school action teams with a holistic understanding of the school.

The MRA measures are aligned with the highly effective practices outlined in the *Leader in Me* Framework. This alignment empowers schools to move from school-performance insights to action plans to best leverage limited resources and help *Leader in Me* Schools reach their Wildly Important Goals.

School-level data and online assessments are displayed using a highly visual data-analytics tool available within each school's *Leader in Me* Online profile. The data tool helps school leaders easily



assess performance-based data for the purpose of reporting and analysis, enabling them to explore trends and target areas of needed growth through data-based decision making.



INTELLECTUAL PROPERTY

FranklinCovey's unparalleled intellectual property is presented in all of the content listed above. In addition, an active *Leader in Me* annual membership allows educators to create derivative works for school use such as lesson plans and activities. The membership also allows school staff to use the characters and models for hallways displays, classroom themes, and other non-commercial uses to advance student and teacher learning within the school community.

ALL ACCESS PASS

All-Access Pass provides unlimited access to all of our best-in-class content and solutions via our proprietary web based portal. It supports leaders not only with acquiring new skills, but deepening their learning through a rich selection of training workshops. The resources, tools and training will empower and equip both district and school leaders to achieve their desired outcomes, and sustainably impact performance across their school district. Clients may renew their subscription on the anniversary date of their contractual agreement to continue to utilize All-Access Pass beyond one year.

ALL ACCESS PASS

FranklinCovey has been helping organizations for nearly three decades—providing them with a combination of the world’s best content and solutions for developing leaders and effective individuals to drive the organization’s most important results. FranklinCovey All Access Pass® provides unlimited access to all of the best-in-class content and solutions, allowing organizations to expand their reach, achieve business objectives, and sustainably impact performance across the entire organization.

What is included in the pass:

The pass comes complete with tools, assessments, videos, digital learning modules and all of FranklinCovey’s training courses—available live in-person and live online.

- Access FranklinCovey’s complete collection of content
- Utilize a portfolio of Impact Journeys that can be integrated into your learning
- Receive ongoing assistance from an exclusive implementation specialist
- Certify your corporate trainers to teach any solution
- Experience passholder discounts on an array of special packages and services

If your goal is to deliver organizational results, develop more effective leaders, or put on high-impact learning events, you understand that often this requires more than just content. It may also necessitate additional expertise and services to drive the impact you need to succeed.

1. Implementation specialists

Your Implementation Specialist can help you get the most out of your pass by helping leaders design and rollout solutions throughout teams, departments, and entire organizations. Utilizing their deep subject-matter expertise, implementation specialists help leaders identify the content, teaching modalities, and impact journeys that best drive desired outcomes. This hand-selected team comes from a wide variety of backgrounds and includes organizational development experts, PhDs, delivery consultants, business owners, and HR/Learning and Development leaders.

Implementation specialists will also help find resources to address specific issues or challenges you may have, orient you to the portal, and assist your facilitators on how to access delivery resources and content through our virtual certification. Implementation specialists can help leaders:

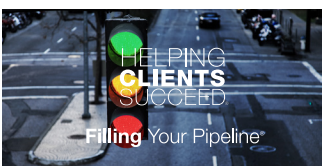
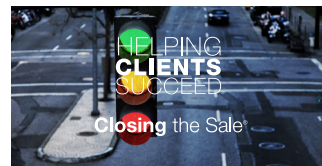
- Identify clear, measurable success criteria
- Diagnose circumstances and determine the right combinations of content
- Map All Access Pass competencies specific to outcomes
- Provide templates and support for implementation
- Develop rich impact journeys to drive learning to results
- Help orient facilitators to the portal and Virtual Certification
- Conduct quarterly and annual business reviews
- Build a business case to share with your executives

There's no additional cost for Implementation specialists.

2. Delivery consultants

Ensure impactful work sessions with a FranklinCovey Consultant with expertise drawn from business and education. As a passholder your organization is able to tap into our team of experts to facilitate any work session needed. Our consultants' real-world experience creates application-rich work sessions and facilitated experiences that will deliver results at any organizational level, from the C-suite to the frontline.

FranklinCovey
ALL ACCESS PASS[®] PLUS | SOLUTIONS AT A GLANCE



WHO ARE YOUR PARTNERS?

FranklinCovey Team – Our team is listed below. Resumes provided on next page for individuals responsible for successful delivery of training, coaching and communication with school sites and school districts related to FranklinCovey.

Client Partner: Primary point of contact for FranklinCovey in regard to school implementation related to existing and new schools.

Wes Bender Email: Wes.Bender@FranklinCovey.com Phone: 770-490-4946

Education Services Partner: Provides support to Client Partner/Coach/Consultant related to scheduling training or overviews. Point of contact for ordering materials.

Jennifer Parr, Email: Jennifer.parr@FranklinCovey.com Phone: 949-682-6346

Coach/Consultant: Direct contact with principals and school staff to implement The Leader in Me. Coach/Consultant will deliver training and on-going coaching support.

Connie West, Email: Connie.West@FranklinCovey.com Phone: 251-604-3316

Client Services Coordinator: Responsible for invoicing, shipping materials, TLIM Online support, and oversees workshop logistics.

Kaysha Baker Email: Kaysha.Baker@FranklinCovey.com Phone: (801) 548-8810

Regional Managing Director: Share best practices for Mid-Atlantic initiatives and provide strategic guidance.

Dustin Odham, Email: Dustin.Odham@FranklinCovey.com Phone: 314-583-0179

Vice President Education: Share best practices for large initiatives and provide strategic guidance. Meg Thompson Email: Meg.Thompson@FranklinCovey.com Phone: 267-716-4394

FranklinCovey High School Consultant: Direct contact with principals and school staff to implement The Leader in Me. Coach/Consultant will deliver training and on-going coaching support.

Lonnie Moore Email: Lonnie.Moore@FranklinCovey.com Phone: (813) 215-4941



Wesley D Bender

Curriculum Vitae

770-490-4946

wes.bender@franklincovey.com

[linkedin.com/in/wesley-bender-705951b](https://www.linkedin.com/in/wesley-bender-705951b)

Grounded in leadership, culture and execution

Proven by 19 years of stewardship in business leadership / sales, and nonprofit operations

Passion for servant leadership, measurable and sustainable results especially in the areas of strategic planning, market research and emotional intelligence

Motivated by speaking engagements, group work, volunteer development, social impact, emotional intelligence, and building inspired teams

CURRENT STEWARDSHIP

CLIENT PARTNER, FRANKLINCOVEY | EDUCATION — AUGUST 2017 - PRESENT

Partner with education institutions to explore, build buy-in, align district and state-level initiatives, raise funds and ultimately purchase FranklinCovey Leadership Development Content and Training (in-person, virtual and OnDemand)

- I. **Stewardship:** Lead through inspiration and trust a team of full-time staff serving 76 schools throughout Tennessee and Mississippi.
- II. **Impact:** Across a diversity of demographics, developed deep, long-term relationships with school board members, district-level staff, school administrators, teachers, students and families. Aided school districts in securing over \$1M in financial support.

PREVIOUS STEWARDSHIP

SENIOR CONSULTANT, DAXKO T2 CONSULTING — OCTOBER 2014 - DECEMBER 2015

Develop leads, build client base and facilitate solutions in the areas of board development, financial development, strategic planning and market research

- I. **Stewardship:** Consulted in-house for Daxko software solutions as well as managed an in-house call center for market research. Navigated numerous data insight tools to provide clients the most relevant information for planning and development.
- II. **Impact:** Developed synergy through interdependent collaborations with all departments throughout Daxko. Built consensus among internal departments and large clients to move design projects forward.

FOUNDER, THE CAUSE DRIVEN CONSULTING GROUP, LLC — JANUARY 2014 - OCTOBER 2014

(Company was acquired in October 2014 by Daxko T2 Consulting)

- I. **Stewardship:** Independent consulting firm focused on youth development innovation and customized outcome tools measuring social capital. Clients include but not limited to: South Carolina YMCA State Alliance, FLOOD student missions, Ultimate Life University, The Fat Boy Chronicles, Guide, Inc., YMCA Blue Ridge Assembly, Meals by Grace.
- II. **Impact:** Produced 2 day conference with 57 non-profit attendees, April 2014. Grew book of business in 10 months gaining national attention and approached to collaborate with Daxko T2 Consulting.

ASSOCIATE EXECUTIVE DIRECTOR OF YOUTH AND INTERNATIONAL INITIATIVES

YMCA OF METRO ATLANTA — 2004 - 2014

Develop and provide strategic leadership to the Metro Atlanta YMCA including its staff, governance volunteers and program volunteers

- I. **Stewardship:** Hired, trained and equipped youth staff and volunteers across 27 regional branch locations. Designed logic models, program rubrics and outcome measures for 75,000 individuals age 0-25. Managed central office budget of \$1.5M and consulted for total branch budgets of \$5.4M.
- II. **Impact:** Taught students fundraising skills equipping 260 students to attend mission efforts in 8 different countries. Engaged 500+ annually in community leadership to under-resourced children (K-5), students from all demographics included.

OTHER ACCOMPLISHMENTS / DISTINCTIONS

2019 FranklinCovey Chairman's Club - 2017 YMCA Middle Tennessee Volunteer of the Year - 2013 Keynote Speaker YMCA Youth Hui (New Zealand) - 2012, 2013 Educator Trainer Ultimate Life University (DisneyWorld) - 2011 YUSA International Conference emcee (San Francisco) - 2002-2004 Student Minister for West End Church of Christ

Certifications / Publications: YMCA Team Leader - RightPath Trainer - Co-Author *Strengthening the Organizational Heart*

EDUCATION

24 hours toward a Masters of Divinity, Lipscomb University, Nashville TN

Bachelor of Arts, major in Biology and double minors in Bible and German, Lipscomb University, Nashville TN

High School Graduation Senior Speaker, Farragut High School, Knoxville TN

JENNIFER PARR

EDUCATION

Bachelor of Science in Marketing May 2006
The University of Tampa
Minor: Communication

Semester Abroad at Monash University Spring 2005
Melbourne, Australia

PROFESSIONAL EXPERIENCE

Franklin Covey – Education Division Asheville, NC
Quality Partner/Business Development July 2017 – Current

- Successfully meet and exceeded yearly revenue goals of over 2 million while developing and maintaining strong relationships with a territory of over 200 schools in the Carolina's and Tennessee.
- Empathetic listening and effectively understand client needs and customize product solutions, during virtual zoom meetings and in-person meetings, to increase revenue in the existing territory
- Effectively manage customer data, detailed client meeting notes, and contracts in Sales Force.

FernLeaf Community Charter School Asheville, NC
Elementary School Teacher August 2016 – June 2017

- Effectively used non-violent communication and/or compassionate communication methods in the classroom.
- Excelled in cultivating and maintaining positive and productive relationships with students, parents, teachers, administration, and the community.
- Developed engaging lessons and hands on learning experiences to meet academic, intellectual, and social needs of students while maintaining a collaborative learning environment.
- Observe, plan, teach, and assessed students and provide differentiated instruction to best serve varying levels of ability.

A Place for Mom Redondo Beach, CA
Senior Living Sales Advisor December 2015 – Summer 2016

- Effectively managed over 35 new leads per week and continually met monthly quotas.
- Successfully moved families through the sales process converting prospects into senior community move-ins.
- Worked effectively within a CRM system to ensure up-to-date family information, as well as maintain accurate sales forecasts.

Metagenics-Bariatric Advantage Division Aliso Viejo, CA
Territory Manager November 2010 – January 2013

- Professionally represented, educated and trained health care professionals and patients on health products and services while generating business transactions.
- Grew territory by 30% in 12 months.
- Created and implemented 14 new e-stores that led to 12% increase in revenue in 12 months.
- Demonstrated strong ability in working effectively with MD's and surgeons.
- Key opinion leaders commented on exceptional customer service and follow up on meetings and project assignments.
- Successfully met and exceeded sales quotas and maintained a position as one of the top sales performer in the company.
- Led patient health fairs, events, trade shows, and presentations on health and nutrition topics.

JENNIFER PARR

PROFESSIONAL EXPERIENCE

JennParr.com

Redondo Beach, CA

Nutrition/Life Coach

September 2011- September 2016

- Work with clients individually, and conduct workshops and speaking engagements for children and adults.
- Act as a mentor and coach in assisting clients in achieving long-term health and lifestyle goals including stress reduction techniques and much more.

Coastal Web Services

Baltimore, MD

Director of Marketing and Business Development

June 2003 –November 2010

- Managed and created email marketing content, monthly newsletters, and marketing material.
- Presented web design and marketing solutions for 100's of small to medium size businesses.
- Monitored inbound social media activity, and accurately answered customer inquiries in a professional, and timely manner.
- Identified business development and leveraging opportunities and continually met and exceeded monthly sales quotas.

Surf Club

Wilmington, NC

Camp Coordinator

Summer 2006

- Planned and implemented daily activities for children including creative projects, games, and physical activities for children ages 4-12.
- Structured programs based on the needs and interests of the children and their parents while creating and maintaining positive relationships, mentoring and a support system for the children.

CERTIFICATIONS

Holistic Health Coach Certification

Winter 2010 – May 2012

Integrative Nutrition

Licensed vocational school through New York State Department of Education

The State University of New York, Purchase College

Board Certified and Member of American Association of Drugless Practitioners (AADP)

Laughter Yoga Teacher

Spring 2012

Dr. Kataria School of Laughter Yoga

COMMUNITY INVOLVEMENT

Current member of Sierra Club, Friends of the Earth, and attend other local networking groups and events. Active participant of community groups including **volunteer work at the YMCA and A Place Called Home**, a member of the Farm Sanctuary, Sorority Alumni Chapter, and other local organizations that support the environment. Lead a writing group as well called Asheville Writing Collective.

Kaysha Baker

393 Woodlake Drive #31 SLC, UT 84107 • (801) 548-8810 • kamber980@gmail.com

Objective

Task and results oriented, positive, team player with a passion for serving others. Strong ability to work with and lead a team, but capable and confident working unsupervised. Effective at identifying problems, while developing and implementing solutions. 19 years customer service experience, with 1 year of management experience, where I reduced the cost of operations by 35%.

Education

- University of Arkansas Two Semesters
- Prairie Grove High, Prairie Grove, AR Graduated with High Honors - 1998

Experience

- **Darden Restaurants, 2002 - Current**
Customer service in all capacities, hostess, server, and bartending.
 - Greet customers and make them feel welcome.
 - Anticipate guest needs, establish guest connection.
 - Accounts receivables.
- Jones Heating and Air, 2012 – Current
General office cleaning.
- Ace Disposal, 12/2015 - 3/2016
Cleaning multiple office buildings at different locations throughout the valley. Responsible for ordering and maintaining supplies. Laundry service and maintaining employee uniforms.
- **Alano Club, 12/2014 - 5/2015**
Cafe Manager. Responsible for day to day management of the Alano Club Cafe, including employee scheduling, interviewing, hiring, terminating employees, payroll, general H.R. Functions. Managing and maintaining inventory, including ordering all supplies. Accounts payable and accounts receivables. Certified serv safe certification.

Skills – Typing speed 50 WPM, Microsoft office, Excel, Word, and Powerpoint.

Connie R. West

115 Trailwood Drive || Clinton, MS 39056

west.connier@gmail.com

(601)-826-9335

SUMMARY OF QUALIFICATIONS

Dynamic and results-focused professional with 10 years of experience relating to all facets of instructional systems development (ISD); curriculum development; instructional materials development; classroom instruction; classroom management; strategic planning and implementation; and staff mentoring, training, and coaching. Proven ability in technical or administrative work in providing organizational leadership and in formulating innovative strategies to meet goals – directing and coordinating a wide variety of functional areas. Expertise in generating and developing new approaches and concepts in planning long-range programs designed to stimulate advances in coordination achievements. Skilled in analyzing administrative problems, which requires a high degree of independent judgment in the interpretation, application, and enforcement of statutes, rules, regulations, and policies. Experience in planning, developing, evaluating, and administering educational and health and early childhood development education programs – age appropriate curriculum and materials to enhance cognitive, social, physical, and emotional growth.

- **Exceptional Interpersonal and Communication Skills** – Excellent communication and organizational skills. Accustomed to working in fast-paced environments with the key ability to maintain relationships.
- **Work Ethic and Professionalism** – Solid professional standards and an excellent track record of dependability. Maintains a clear focus on achieving organizational results while always ensuring program goals.
- **Problem Solving** – Proven ability to troubleshoot and develop both creative and innovative solutions to institutional challenges; successfully manages change for improved performance and greater efficiency.

PROFESSIONAL EXPERIENCE

Vicksburg Warren School District Central Office Gifted and Special Programs Coordinator

Vicksburg, MS
July 2012 - Present

- Coordinate the screening, identification, placement, and evaluation process of gifted students. Plan in-service training, supervisor for gifted education teachers and other school personnel at the building and district levels.
- Foster the development of higher order thinking skills in all children through coordination opportunities and professional development for teachers (model instruction for gifted and regular classroom teachers).
- Implement district wide professional development. Collect, analyze, evaluate, and maintain student data.
- Coordinate extra curricula activities for teachers of Gifted students. Facilitate family and community involvement in gifted education. Manage established budget for Gifted and Special Program needs.
- Review the work practices of the Gifted and Special Programs; coordinate activities and advise on policy updates.
- Recommend needed regulations, policies, and procedures for proper administration of the program.
- Participate in admin meetings, school board meetings etc. as needed
- District Facilitator and Coach for Leader in Me. Certified through Franklin Covey for District Implementation Levels 1-4.

Vicksburg Warren School District (Bovina Elementary School) Vicksburg, MS

Teacher (Gifted and Talented Education Services (GATES) August 2009 – July 2012

- Developed and/or revised technically accurate course curriculum, lesson plans, training aids, written tests, course materials and course control documents that addressed all aspects of course subject matter.
- Recognized as subject matter specialist expert in the development of learning programs specifically geared for application. Prepared, administered, and graded written and performance examinations.
- Maintained accurate records of student achievement and certified achievement of criterion objectives.
- Remained cognizant of classroom participation and evaluated progress to identify individual improvement.

District Activities and Committees:

- District Facilitator/Coach Leader in Me
- Certification Manager for Warren County Excel by 5
- PreK Coordinator
- Convocation Co-Chair
- Leader In Me Planning Committee Member, 2011
- Yearbook Sponsor and Editor, 2009-present
- Promote the Vote Coordinator, 2011

Funtime Preschool**Clinton, MS****Daycare Teacher****August 2005 – August 2007**

- Developed and implemented age appropriate curriculum, materials, and recreational activities to enhance the cognitive, social, physical, and emotional development of children ages 2-3 years old.
- Collaborated with direct care staff in specific activity plan development, activity individualization, and evaluation of children's developmental progress. Revised curricula to meet children's changing needs.
- Worked with management in the application of thorough environmental and program assessment instruments such as the Early Childhood Environment Rating Scale and child abuse probability assessments.

EDUCATION**William Carey University****Hattiesburg, MS****Doctorate of Educational Leadership****May 2020****Delta State University****Cleveland, MS****Specialist of Education – Major: Educational Leadership****May 2016****Mississippi College****Clinton, MS****Master of Education – Major: Elementary Education****August 2010****Bachelor of Science in Education Major: Elementary Education****May 2009****PROFESSIONAL TRAINING****Leader in Me Facilitator and Coach for District Implementation (2016-present)****Mississippi Association of Gifted Children****Project-Citizen (Community Problem Solving)****Buck Institute-Problem Based Learning 101****Pearson Master Schedule Builder****Positive Behavior Intervention Strategies (PBIS) Workshop****Professional Learning Communities****Differentiated Instruction by Ian Byrd****Super Six Comprehension Skills by Lori Oskus****Kagan Cooperative Learning Training****“Worksheets Don’t Grow Dendrites” by Dr. Marcia Tate****Will to Lead, Skill to Teach by Anthony Muhammed****The Flippen Group-“Capturing Kids Hearts”****MDE Literacy Coach Training****MS Technology Camp****Making Connections****AFFILIATIONS****Past-President, Mississippi Association of Gifted Children, 2019-present****Member, National Association of Gifted Children, 2012-present****Member, Mississippi Association of Gifted Children, 2010-present; Board member, 2011-present****City of Clinton American Cancer Society Planning Committee Fundraising Co-chair****Warren County Excel by Five Certification Manager****2015 MDE Gifted Work Group****Clinton Junior Civic League Member, 2018-present, President, 2021****Junior League of Jackson, Member 2021-present**

REFERENCES

Paula Johnson- Principal, St. Frances Xavier Catholic School
Pjoh1127@aol.com, 713.201.3980

Shaquita Burke- Business Office Contract Consultant, Mississippi Department of Education
Shawin929@gmail, 601.918.5670

Zelda Thuha, Teacher of the Gifted, Vicksburg Warren School District
Misszzd6@gmail.com, 601.218.4527

PART IV

Budget Section

*Please check the appropriate response

Attachment C

Enrollment Numbers and Teacher Units by School (Projected for 2022-2023)
New numbers will be provided for 2023-2024 and 2024-2025 based on changes
in enrollment and/or teacher units.

Mendenhall Elementary

Grade Level	Number of Students	Number of Teachers
K	104	5
1	104	5
2	80	4
3	99	4
4	90	4
5	87	4
Support Services		6
Number of Admin. And Support		5

Magee Elementary

Grade Level	Number of Students	Number of Teachers
K	96	4
1	96	4
2	92	4
3	84	5
4	93	4
5	85	6
Support Services		4
Number of Admin. And Support		10

Mendenhall Jr. High

Grade Level	Number of Students	Number of Teachers
6	73	
7	78	
8	95	
		27
Number of Admin. And Support		5

Mendenhall High

Grade Level	Number of Students	Number of Teachers
9	150	
10	153	
11	147	
12	118	
Support Services		33
Number of Admin. And Support		5

Magee Middle

Grade Level	Number of Students	Number of Teachers
6	112	
7	97	
8	124	
		28
Number of Admin. And Support		5

Magee High

Grade Level	Number of Students	Number of Teachers
9	98	
10	130	
11	93	
12	94	
		29
Number of Admin. And Support		5

Simpson Central School

Grade Level	Number of Students	Number of Teachers
K	50	2
1	50	2
2	44	3
3	44	2
4	50	3
5	48	3
6	64	3
7	56	3
8	62	3
Support Services		4
Number of Admin. And Support		5

Attachment D

Professional Development

Cost per day for Year 1	Cost per day for Year 2	Cost per day for Year 3
\$3,300*	\$3,300*	\$3,300*
Number of Service Days, Year 1	Number of Service Days, Year 2	Number of Service Days, Year 3
32	37	37

Printed Materials

	Cost per printed material for students Year 1 *	Cost per printed material for teachers Year 1 *	Cost per printed material for students Year 2 *	Cost per printed material for teachers Year 2 *	Cost per printed material for students Year 3 *	Cost per printed material for teachers Year 3 *
K	\$6.18	\$40.34	\$6.18		\$6.18	
1	\$6.18	\$40.34	\$6.18		\$6.18	
2	\$6.18	\$40.34	\$6.18		\$6.18	
3	\$6.18	\$40.34	\$6.18		\$6.18	
4	\$6.18	\$40.34	\$6.18		\$6.18	
5	\$6.18	\$40.34	\$6.18		\$6.18	
6-8	\$7.43	\$38.34	\$7.43		\$7.43	
9-12	N/A	N/A	N/A		N/A	

The cost of shipping must be included in your budget proposal on Bid Day. The Simpson County School District will provide more specific numbers for items needed for shipment to each school after the RFP is selected. The vendor will be responsible for shipping goods to the specified locations. The addresses are as follows:

Magee Elementary, 1035 Goodwater Road Magee, MS 39111

Mendenhall Jr. High, 733 Dixie Ave., Mendenhall, MS 39114

Mendenhall Elem. 814 East St. Mendenhall, MS 39114

Mendenhall High 207 Circle Drive Mendenhall, MS 39114

Magee Middle 300 1st St. NE, Magee, MS 39111

Magee High 501 Choctaw St. Magee, MS 39111

Simpson Central, 755 Simpson Hwy. 28 W, Pinola, MS 39149

[*View the Attached Investment Summary on the following pages.](#)



Simpson County School District

Investment Summary Detail

Investment Summary

Year 1	\$207,507.12
Year 2	\$212,031.67
Year 3	\$212,031.67
Total	\$631,570.46

YEAR 1

\$207,507.12

Annual Membership

\$55,500.00

DESCRIPTION	PRICE	QUANTITY	TOTAL
District Membership	\$1,500.00	1	\$1,500.00
Annual Membership (Elementary/Middle)	\$5,100.00	5	\$25,500.00
Annual Membership (High/K12)	\$9,500.00	3	\$28,500.00

Includes 3 Coaching Sessions, Principal Development Track, Lighthouse Coordinator Development Track, Online Professional Learning, Student and Classroom Content, and Measurable Results Assessment (MRA).

0 School has received the Small school discount.

District Coaching

\$26,000.00

DESCRIPTION	PRICE	QUANTITY	TOTAL
District Membership Implementation Coaching Subscription	\$3,500.00	1	\$3,500.00
District Membership Six 1-Hour Coaching Sessions	\$3,500.00	1	\$3,500.00
Core 1 District Coach Certification and Development	\$3,500.00	3	\$10,500.00
Core 1 Certification and Development Bundle	\$0.00	3	\$0.00
All Access Pass User License	\$170.00	50	\$8,500.00

Leader in Me Core 1

\$120,106.72

Lighthouse Team Workshop: Core 1			\$18,560.20
DESCRIPTION	PRICE	QUANTITY	TOTAL
Workshop delivered by Coach	\$3,300.00	5	\$16,500.00
Lighthouse Team 1, 2, 3 Participant Guide	\$30.00	60	\$1,800.00
Shipping Estimate (Actual Invoiced)			\$260.20
All Staff Workshop: 7 Habits Signature / Core 1			\$40,764.82
DESCRIPTION	PRICE	QUANTITY	TOTAL
Workshop delivered by Coach or Consultant	\$3,300.00	6	\$19,800.00
7 Habits Signature 4.0 Participant Guide	\$70.00	198	\$13,860.00
Core 1 Participant Guide	\$30.00	198	\$5,940.00
Shipping Estimate (Actual Invoiced)			\$1,164.82
Lighthouse Team Workshop (Student & Teacher): Leading Results			\$8,084.76
DESCRIPTION	PRICE	QUANTITY	TOTAL
Workshop delivered by Coach	\$3,300.00	2	\$6,600.00
Lighthouse Team 1, 2, 3 Participant Guide	\$30.00	36	\$1,080.00
Leadership Teaching Bundle (Semester Leadership Guides)	\$80.00	3	\$240.00
Shipping Estimate (Actual Invoiced)			\$164.76

Lighthouse Team Workshop (Student & Teacher): Lighthouse Teams 1			\$6,600.00
DESCRIPTION	PRICE	QUANTITY	TOTAL
Workshop delivered by Coach or Consultant	\$3,300.00	2	\$6,600.00
All Staff Workshop: 7 Habits and Teaching Leadership			\$19,696.94
DESCRIPTION	PRICE	QUANTITY	TOTAL
Workshop delivered by Coach or Consultant	\$3,300.00	4	\$13,200.00
7 Habits Signature 4.0 Participant Guide	\$70.00	86	\$6,020.00
Shipping Estimate (Actual Invoiced)			\$476.94
Coaching			\$26,400.00
DESCRIPTION	PRICE	QUANTITY	TOTAL
Core 1 Implementation Coaching Subscription	\$3,300.00	8	\$26,400.00

Materials and Enhancements			\$5,900.40
Student / Staff Materials			\$5,900.40
STUDENT LEADERSHIP GUIDES	PRICE	QUANTITY	TOTAL
Teacher Editions: LIM Student Leadership Guides	\$36.00	75	\$2,700.00
Teacher Editions: LEAD Student Journals	\$34.00	75	\$2,550.00
Shipping Estimate (Actual Invoiced)			\$650.40

YEAR 2 \$212,031.67

Annual Membership			\$55,500.00
DESCRIPTION	PRICE	QUANTITY	TOTAL
District Membership	\$1,500.00	1	\$1,500.00
Annual Membership (Elementary/Middle)	\$5,100.00	5	\$25,500.00
Annual Membership (High/K12)	\$9,500.00	3	\$28,500.00
<i>Includes 3 Coaching Sessions, Principal Development Track, Lighthouse Coordinator Development Track, Online Professional Learning, Student and Classroom Content, and Measurable Results Assessment (MRA).</i>			

District Coaching			\$26,000.00
DESCRIPTION	PRICE	QUANTITY	TOTAL
District Membership Implementation Coaching Subscription	\$3,500.00	1	\$3,500.00
District Membership Six 1-Hour Coaching Sessions	\$3,500.00	1	\$3,500.00
Core 2 District Coach Certification and Development	\$3,500.00	3	\$10,500.00
Core 2 Certification and Development Bundle	\$0.00	3	\$0.00
All Access Pass User License	\$170.00	50	\$8,500.00

Leader in Me Core 2			\$115,996.30
Lighthouse Team Workshop: Core 2			\$17,080.10
DESCRIPTION	PRICE	QUANTITY	TOTAL
Workshop delivered by Coach	\$3,300.00	5	\$16,500.00
Lighthouse Team 1, 2, 3 Participant Guide	\$30.00	15	\$450.00
Shipping Estimate (Actual Invoiced)			\$130.10
All Staff Workshop: Core 2			\$23,090.40
DESCRIPTION	PRICE	QUANTITY	TOTAL
Workshop delivered by Coach or Consultant	\$3,300.00	5	\$16,500.00
Core 2 Participant Guide	\$30.00	198	\$5,940.00
Shipping Estimate (Actual Invoiced)			\$650.40
Lighthouse Team Workshop (Student & Teacher): Lighthouse Teams 2			\$10,248.06
DESCRIPTION	PRICE	QUANTITY	TOTAL
Onsite Workshop delivered by Coach	\$3,300.00	3	\$9,900.00
Lighthouse Team 1, 2, 3 Participant Guide	\$30.00	9	\$270.00
Shipping Estimate (Actual Invoiced)			\$78.06

All Staff Workshop: Leading Culture			\$12,777.74
DESCRIPTION	PRICE	QUANTITY	TOTAL
Onsite Workshop delivered by Coach or Consultant	\$3,300.00	3	\$9,900.00
Leading Culture Participant Guide	\$30.00	86	\$2,580.00
Shipping Estimate (Actual Invoiced)			\$297.74

Coaching			\$52,800.00
DESCRIPTION	PRICE	QUANTITY	TOTAL
Core 2 Implementation Coaching Subscription	\$3,300.00	16	\$52,800.00

Materials and Enhancements \$14,535.37

Student / Staff Materials			\$14,535.37
STUDENT LEADERSHIP GUIDES	PRICE	QUANTITY	TOTAL
LIM Student Leadership Guides (Elementary Grades)	\$5.75	1265	\$7,273.75
LEAD Student Journals (Middle School Grades)	\$7.00	904	\$6,328.00
Shipping Estimate (Actual Invoiced)			\$933.62

YEAR 3 \$212,031.67

Annual Membership \$55,500.00

DESCRIPTION	PRICE	QUANTITY	TOTAL
District Membership	\$1,500.00	1	\$1,500.00
Annual Membership (Elementary/Middle)	\$5,100.00	5	\$25,500.00
Annual Membership (High/K12)	\$9,500.00	3	\$28,500.00

Includes 3 Coaching Sessions, Principal Development Track, Lighthouse Coordinator Development Track, Online Professional Learning, Student and Classroom Content, and Measurable Results Assessment (MRA).

District Coaching \$26,000.00

DESCRIPTION	PRICE	QUANTITY	TOTAL
District Membership Implementation Coaching Subscription	\$3,500.00	1	\$3,500.00
District Membership Six 1-Hour Coaching Sessions	\$3,500.00	1	\$3,500.00
Core 3 District Coach Certification and Development	\$3,500.00	3	\$10,500.00
Core 3 Certification and Development Bundle	\$0.00	3	\$0.00
All Access Pass User License	\$170.00	50	\$8,500.00

Leader in Me Core 3 \$115,996.30

Lighthouse Team Workshop: Core 3			\$17,080.10
DESCRIPTION	PRICE	QUANTITY	TOTAL
Workshop delivered by Coach	\$3,300.00	5	\$16,500.00
Lighthouse Team 1, 2, 3 Participant Guide	\$30.00	15	\$450.00
Shipping Estimate (Actual Invoiced)			\$130.10

All Staff Workshop: Core 3			\$23,090.40
DESCRIPTION	PRICE	QUANTITY	TOTAL
Workshop delivered by Coach or Consultant	\$3,300.00	5	\$16,500.00
Core 3 Participant Guide	\$30.00	198	\$5,940.00
Shipping Estimate (Actual Invoiced)			\$650.40

Lighthouse Team Workshop (Student & Teacher): Lighthouse Teams 3			\$10,248.06
DESCRIPTION	PRICE	QUANTITY	TOTAL
Onsite Workshop delivered by Coach	\$3,300.00	3	\$9,900.00
Lighthouse Team 1, 2, 3 Participant Guide	\$30.00	9	\$270.00
Shipping Estimate (Actual Invoiced)			\$78.06

All Staff Workshop: Leading Achievement			\$12,777.74
DESCRIPTION	PRICE	QUANTITY	TOTAL
Onsite Workshop delivered by Coach or Consultant	\$3,300.00	3	\$9,900.00
Leading Achievement Participant Guide	\$30.00	86	\$2,580.00
Shipping Estimate (Actual Invoiced)			\$297.74
Coaching			\$52,800.00
DESCRIPTION	PRICE	QUANTITY	TOTAL
Core 3 Implementation Coaching Subscription	\$3,300.00	16	\$52,800.00

Materials and Enhancements			\$14,535.37
Student / Staff Materials			\$14,535.37
STUDENT LEADERSHIP GUIDES	PRICE	QUANTITY	TOTAL
LIM Student Leadership Guides (Elementary Grades)	\$5.75	1265	\$7,273.75
LEAD Student Journals (Middle School Grades)	\$7.00	904	\$6,328.00
Shipping Estimate (Actual Invoiced)			\$933.62

PART V

Terms and Conditions

Simpson County

Deviations to Specifications

Section F Type of Contract

- Reason for Deviation: Notwithstanding the foregoing, purchases of membership or subscription licenses shall be paid for up front at the beginning of each license term.

Section L9 Conditions of Solicitation

- Reason for Deviation: Notwithstanding the foregoing, in the event SCSD cancels the contract for convenience, contractor shall not refund any fees paid by SCSD prior to cancellation.

Section O7(ii) Copyrights and Patents

- Reason for Deviation: Contractor cannot agree to this grant of rights language. Proposed language is as follows:
 - Leader in Me Grant of Rights: Contractor hereby grants to the SCSD a limited, non-exclusive, non-transferable, revocable license for certain SCSD administrators and teachers and/or staff of schools ("Users"), for whom an annual license fee has been paid, to access The Leader in Me Online protected site of Contractor's Leader in Me website ("Portal"). Access to the Portal shall be available only to Users, who will receive a unique registration code from an authorized representative of School (e.g., Superintendent, Principal) prior to logging into the site. Users agree not to make the Portal available in any manner to individuals who are not a party to this Agreement, including the general public and, specifically, students. The Portal is provided for the benefit of Users only who have paid a license fee to access the Portal.
 - All Access Pass Grant of Rights: Contractor grants SCSD, including its Affiliates (meaning an entity that controls, is controlled by, or is under common control with SCSD where "control" means ownership of 50% or greater of the equity of that entity or the ability to direct the management of that entity), a limited, non-exclusive, non-transferable, revocable license for certain SCSD employees, for whom fees have been paid ("Passholders"), to (a) print or download from Contractor's web-based platforms, the participant and facilitator Materials as they exist (collectively "Materials"); and (b) create "Compilations," which means a Passholder's right to take portions of the downloadable Materials and use them in accordance with the terms of this Agreement and specifically in accordance with the Guidelines attached hereto as Exhibit A.

Section O13 Availability of Funds

- Reason for Deviation: Notwithstanding the foregoing, in the event SCSD cancels the contract for convenience, contractor shall not refund any fees paid by SCSD prior to cancellation.

Section O14(2) Stop Work Order

- Reason for Deviation: Need an additional subsection (c) added:
 - (c) In the event the stop-work order is towards a membership or subscription license, such memberships and licenses have specific start and end dates. Should SCSD issue a stop-work order, such membership and license end-dates shall not be extended.

Section O16(1) Termination for Convenience

- Reason for Deviation: Notwithstanding the foregoing, in the event this contract is canceled for convenience, contractor shall not refund any fees paid by SCSD prior to cancellation.

Leader in Me Terms and Conditions: In the event SCSD wishes to purchase Contractor Leader in Me memberships, the following terms must be incorporated and will apply to any purchase of a Leader in Me membership.

General: District shall provide each School a copy of this Agreement. District shall convey to each School that each School is considered an entity of SCSD and shall be bound by all terms and conditions described herein. Certain District administrators and teachers and/or staff of Schools ("Users") are entitled to access The Leader in Me Online protected site of Contractor's Leader in Me website (the "Portal") located at www.TheLeaderInMeOnline.org and receive a limited license to use certain Contractor intellectual property as defined in this Agreement.

Grant of Rights To Portal: Contractor hereby grants a limited, non-exclusive, non-transferable, revocable license for Users, for whom an annual license fee has been paid, to access the Portal. Access to the Portal shall be available only to Users, who will receive a unique registration code from an authorized representative of School (e.g., Superintendent, Principal) prior to logging into the site. Users agree not to make the Portal available in any manner to individuals who are not a party to this Agreement, including the general public and, specifically, students. The Portal is provided for the benefit of Users only who have paid a license fee to access the Portal.

Intellectual Property License: Contractor hereby grants the School, a limited, non-exclusive license (the "License") to use the FC IP (defined below) within the School only in connection with the delivery or promotion of Contractor's The Leader in Me® solution within the School. For clarity, the FC IP may be used with, but is not limited to, lesson plans, bulletin boards, posters, tee shirts, pins, songs, and other similar uses, excluding planners/agendas, unless such planners/agendas are purchased through SDI Innovations. Further, School shall not use a Contractor trademark, such as The Leader in Me®, in or as a domain name. The License to the FC IP shall not be sublicensed, assigned, or transferred by School. All works created by School using the FC IP shall be deemed derivative works ("Derivative Works"), and are owned by Contractor and may be used only pursuant to the license granted herein. The "FC IP" shall mean The Leader in Me trademarks and copyrighted materials provided to the School by Contractor, including intellectual property associated with The 7 Habits®. School shall effectively communicate to its staff, employees, teachers, and anyone else who may have access to or receive the FC IP that such FC IP is copyright-protected and the proprietary property of Contractor, and that neither School nor its employees shall modify, reproduce, file share, email, distribute to a third party, or publicly post (Slide Share, YouTube, etc.) the FC IP and any Derivative Works created by School or its employees except as expressly provided for herein. The FC IP is for the benefit of School for use within its School only.

Measurable Results Assessment: The Leader in Me process includes a survey whereby staff, parents, and students of Schools are asked questions related to leadership, culture, and academics. An authorized person from the School will be provided a URL link of the survey questions to share with staff, parents, and students. Personally identifiable information ("PII") will not be collected as part of the survey, but in the event information is categorized as PII, then Contractor will not permit disclosure outside its own organization and it will take all commercially practicable measures to destroy PII when it is no longer needed for the purpose of the survey. Survey results will be compiled in an aggregate form and shared with third parties such as donors and sponsors. Survey results may also be used for research. To emphasize, no PII will be collected, and the survey is not mandatory.

Leadership Development: Principals Development Track and Lighthouse Coordinator Development Track for Schools provide opportunities for teachers and/or staff of Schools to attend professional development at a location in or near School's community determined by Contractor. In the event participants must travel, travel expenses shall be the responsibility of SCSD.

Scheduling a Consultant. Contact Contractor via email preferably thirty (30) days in advance to schedule a Contractor consultant. Once scheduled, the cancellation/rescheduling provisions will apply.

Cancellation/Rescheduling Fees: Fifteen (15) calendar days' notice is required to cancel or reschedule the Services. If SCSD provides fewer than fifteen (15) days' notice, SCSD will be billed a cancellation fee of \$1,250 or a rescheduling fee of \$625 to

cover costs incurred by Contractor. SCSD will not be assessed a cancellation/rescheduling fee if the Onsite Coaching day is cancelled or rescheduled by Contractor.

Term, Termination, and Events of Termination: The term of this Agreement shall commence on the Effective Date and terminate on the End Date identified in the table above. If SCSD terminates for convenience, Contractor shall not refund any amounts paid by District, and District shall pay Contractor all remaining amounts identified in the table above within thirty (30) days of such termination. Either party may terminate this Agreement if the other party materially breaches the Agreement, and such material breach remains uncured after the non-breaching party has provided thirty (30) days' written notice of such breach. Upon termination of this Agreement for any reason, District shall immediately (i) discontinue all use of the FC IP; and (ii) discontinue all use of Derivative Works.

Payment Terms: Contractor shall invoice District for all fees as identified in the table(s) above, which fees are nonrefundable and non-prorateable, including shipping and handling, and sales and use taxes (unless SCSD submits proof of its tax-exempt status to Contractor). All shipments are FOB Shipping Point. Payment terms are net 30 from the invoice date. Fees are subject to an annual price increase.

Additional Materials: If during the term of this Agreement the initial student/teacher count provided to Contractor increases and District requires additional materials as a result of such increase, District shall contact Contractor in writing (email is sufficient) providing the updated quantity, and Contractor will ship the materials and invoice District in accordance with the payment terms in this Agreement.

Copyright: Contractor owns all intellectual property rights, proprietary rights, and copyrights to all training session concepts and materials. Any unauthorized use, reuse, copying, reproduction, recording, transmittal, modification, or revision of such materials or concepts of the scheduled training session or any portion thereof is expressly prohibited and shall constitute a breach of this Agreement and/or federal copyright law. The training session materials provided herein are intended for personal use only by the Users to apply the concepts learned within the School, and are not for resale or public display. Nothing in this Agreement implies a grant of license for District or the Schools to use the training session concepts and materials outside of the scope of this Agreement.

Leader in Me Notifications: Contractor may send to teachers, staff, and employees via email or other means promotional materials, product updates, upcoming events and other information pertinent to The Leader in Me process. Anyone receiving such information may opt out at any time.

Modification of Agreement: All amendments or modifications to this Agreement must be in writing signed by the parties hereto. The person executing this Agreement on behalf of SCSD warrants that he/she has authority to bind District.

Affirmative Action/Equal Opportunity Employer: Contractor complies with the EEO Clause of EO 11246, as amended, and the provisions of 41 CFR Section 60-300.5(a); 41 CFR Section 60-741.5(a); 41 CFR Section 60-1.4(a) and (c); 41 CFR Section 60-1.7(a); 48 CFR Section 52.222-54(e); and 29 CFR Part 471, Appendix A to Subpart A, with respect to affirmative action program and posting requirements.

All Access Pass Terms and Conditions: In the event SCSD wishes to purchase Contractor All Access Pass licenses, the following terms and Exhibit A must be incorporated and will apply to any purchase of an All Access Pass.

- A. Grant of Rights.** Contractor grants SCSD, including its Affiliates (meaning an entity that controls, is controlled by, or is under common control with the SCSD where "control" means ownership of 50% or greater of the equity of that entity or the ability to direct the management of that entity), a limited, non-exclusive, non-transferable, revocable license for the Passholders, for whom fees have been paid, to (a) print or download from Contractor's web-based platforms, the participant and facilitator Materials as they exist (collectively "Materials"); and (b) create "Compilations," which means a Passholder's right to take portions of the downloadable Materials and use them in accordance with the terms of this Agreement and specifically in accordance with the Guidelines attached hereto as Exhibit A.
- B. Limitations to Grant of Rights.** SCSD agrees not to make, or allow its employees to make, Derivative Works (defined by U.S. Copyright Law, 17 U.S.C. §101, as amended). SCSD will effectively communicate to its Passholders that the Materials are copyright-protected and the proprietary property of Contractor, and that neither SCSD nor its employees shall file share, distribute to a third party, or publicly post (Slide Share, YouTube, etc.) any of the Materials except as provided for herein. SCSD acknowledges and agrees that it will take commercially practicable means as technologically feasible, to prevent the Materials from being used or accessed without proper authorization. Materials designated as "Facilitator Materials" are intended for use by Passholders certified to deliver the Contractor Solutions. Non-

Passholders are not eligible for Passholder pricing. Training must be delivered and participant Materials consumed during the License Term.

- C. **Returning Participant Materials.** Contractor will extend a refund for unused pre-packaged participant Materials returned within thirty (30) days of purchase or the date of the event. For clarity, customized products and digital products that are not a component of the pre-packaged Materials are not eligible for refund. All Materials carry an unconditional guarantee against any manufacturing defect for one (1) year.
- D. **Invoicing.** Contractor shall invoice SCSD for the non-refundable and non-prorateable license fees at the beginning of each license term.
- E. **Third Party Restrictions.** The facilitator videos, Jhana: Bite Sized Learning for Learners, Contractor InSights, and Contractor Excelerators may not be modified or edited in any way. Certain facilitator program videos may not be embedded into the facilitator PowerPoint. Digital access is not available with certain ancillary participant materials. These program videos and materials, including, but not limited to *Creative Juicers*, *Contractor Style Guide*, *Managing Essentials*, *Leadership Essentials*, and *Leadership Foundations Handbook*, may be purchased separately, upon request.
- F. **Termination and Events of Termination.** Upon termination of each Passholder license, such Passholders shall immediately (a) discontinue all use of the Contractor Solutions; (b) discontinue all use of Compilations; and (c) remove all Contractor content from Compilations which were blended with SCSD content. Notwithstanding the foregoing, Passholders who received the Participant materials prior to termination may continue to use them for their personal use to apply the concepts learned from a Contractor Solution.
- G. **Copyright.** SCSD acknowledges that Contractor or its licensors exclusively own all proprietary rights and copyrights to the Contractor solutions including, but not limited to, the Materials and any documentation, images, animation, sound, music, and text relating to the Contractor solutions. Any unauthorized use, reuse, copying, reproduction, recording, transmittal, modification, or revision of the Contractor solutions is expressly prohibited and will constitute a breach of this Agreement and/or copyright laws.
- H. **Limitation of Liability.** Contractor does not make any warranty, guarantee, or representation, either express or implied (1) regarding the merchantability or fitness for a particular purpose of the Contractor solutions, or (2) that certain results may be obtained in connection with the use of the Contractor solutions. Contractor does not assume any responsibility for any damage or loss caused by the misuse of the Contractor solutions, the misuse of software, hardware or systems of any third-party or SCSD. Contractor shall not be liable for any consequential, incidental or punitive damages arising from this Agreement or the Contractor solutions provided in any SOW.

Exhibit A

GUIDELINES FOR ALL ACCESS PASSHOLDERS FOR CREATING COMPILATIONS

As a Contractor Passholder, you are allowed to combine segments from the Contractor content included in your pass, even with your own content, for use for the population included in your All Access Pass agreement subject to the guidelines provided herein.

Consider this example: Your organization requires help with communication and trust. Using the listening skills from Habit 5 of *The 7 Habits of Highly Effective People*® Signature program and the 13 Trust Behaviors from *Speed of Trust*® Foundations, combine them to create a single training designed to improve these specific skills and behaviors.

Or, perhaps you have your own internal content on effective communication skills that reinforces your company's values, and you would like to combine it with related Contractor content. As long as the Contractor content is properly attributed, you can do this, as well, adding your own examples or application exercises to the Contractor solution.

If you would like help designing custom solutions, your organization is eligible for discounted Contractor Passholder pricing for our customization services.

The following guidelines are provided to ensure that Contractor's intellectual property, as well as the intellectual property of our partners and other third parties, is respected as you work with our content.

What you can do:

- You are allowed to use Contractor ideas, models, or concepts in combination with other Contractor content included in your pass, or your own content for the Passholder population only identified in your All Access Pass, as long as they are properly attributed. The following statement is an example of proper attribution:

©Contractor Co. All rights reserved. Used herein with permission under an existing license agreement.

- You are required to include specific trademark notations (® or ™) found in our content. For example,
The 7 Habits of Highly Effective People®

What you can't do:

- You are not allowed to use Contractor ideas, models, or concepts outside of the Passholder population covered by your Contractor All Access Pass agreement.
- You are not permitted to use Contractor ideas, models or concepts without proper copyright attribution.
- You are not allowed to edit or disassemble quotes, videos, or extract music, images, or other media elements for use in a way that is separate from our content. We realize they may add professional appeal, but they are licensed materials limited for use, as is, within the Contractor Solutions.
- You can't change the names, titles, or terminology of our content, or otherwise create "derivative works" as defined by U.S. copyright laws. For example, you aren't allowed to change, adapt, or modify the name of one of the 7 Habits® or change, adapt, or modify the shape of a model or diagram. You must use our content as it exists.
- You cannot sell, relicense, repackage, or otherwise give Contractor content to others.
- You cannot do anything that compromises Contractor's ownership of its intellectual property or its rights.
- You cannot use Contractor intellectual property in a way that disparages its brand or tarnishes its image. Contractor is proud of its content and wants it to be presented in the best possible way.

As long as you have a current Contractor All Access Pass agreement, you can continue to use our content as outlined above. If, for some reason, you choose not to renew your All Access Pass license, you must discontinue use of all Contractor intellectual property including content, ideas, models, videos, music, and images. For additional details, please refer to the license agreement between Contractor and your organization.

O. STANDARD TERMS AND CONDITIONS

Certain terms and conditions are required for contracting. Therefore, the offeror shall assure agreement and compliance with the following standard terms and conditions.

1. ACCESS TO RECORDS

The Contractor agrees that the SCSD, Mississippi Department of Education, United States Department of Education, the Comptroller General of the United States, or any of its duly authorized representatives at any time during the term of this agreement, shall have access to, and the right to audit and examine any pertinent books, documents, papers, and records of Contractor related to this specific contract to make audit,

examination, excerpts, or transcriptions. Such records shall be kept by Contractor for three (3) years after final payments and all other pending matters are closed under this agreement, Contractor agrees to refund to the SCSD any overpayment disclosed by any such audit. However, if any litigation, claim, negotiation, audit, or other action involving the records has been started before the expiration of the 3-year period, the records shall be retained until completion of the action and resolution of all issues which arise from it.

2. APPLICABLE LAW

The contract shall be governed by and construed under the laws of the State of Mississippi, excluding its conflicts of law provisions, and any litigation with respect thereto shall be brought in the courts of the State. The Contractor shall comply with applicable federal, state, and local laws and regulations. In compliance with State law, the Contractor, if employed by a public entity, must make arrangements with his/her employer to take the appropriate leave (professional, etc.) during the period of service covered by the Contractor.

3. ASSIGNMENT

The contractor shall not assign or subcontract in whole or in part, its right or obligations under this agreement without the prior written consent of the SCSD. Any attempted assignment without said consent shall be void and of no effect.

4. AUTHORITY TO CONTRACT

Contractor warrants (a) that it is a validly organized business with valid authority to enter into this agreement; (b) that it is qualified to do business and in good standing in the State of Mississippi; (c) that entry into and performance under this agreement is not restricted or prohibited by any loan, security, financing, contractual, or other agreement of any kind; and (d) notwithstanding any other provision of this agreement to the contrary, that there are no existing legal proceedings or prospective legal proceedings, either voluntary or otherwise, which may adversely affect its ability to perform its obligations under this agreement.

5. COMPLIANCE WITH LAWS

The Contractor understands that the SCSD is an Equal Opportunity Employer and therefore maintains a policy which prohibits unlawful discrimination based on race, color, creed, sex, age, national origin, physical handicap, disability, or any other consideration made unlawful by federal, state, or local laws. All such discrimination is unlawful and the Contractor agrees during the term of the agreement that the Contractor will strictly adhere to this policy in its employment practices and provision of services. The Contractor shall comply with Executive Order 11246 of September 24, 1965, entitled "Equal Employment Opportunity," as amended by Executive Order 11375 of

October 13, 1967, and as supplemented by the Department of Labor. All activities under this agreement shall be subject to, all applicable federal, State of Mississippi, and local laws and regulations, as now existing and as may be amended or modified.

6. INDEPENDENT CONTRACTOR

The Contractor shall perform all services as an independent contractor and shall at no time act as an agent for the SCSD. No act performed or representation made, whether oral or written, by the contractor concerning third parties shall be binding on the SCSD.

7. COPYRIGHTS AND PATENTS

Contractor (i) agrees that the SCSD shall determine the disposition of the title to and the rights under any copyright or patent by Contractor or employees on copyrightable material first produced, composed, discovered or invented in the course of or under this agreement, and (ii) hereby grants to the SCSD a royalty-free, nonexclusive, irrevocable license to reproduce, translate, publish, use and dispose of, and to authorize others to do so, all copyrighted or (copyrightable) work not first produced or composed by Contractor in the performance of this agreement, but which is incorporated in the material furnished under the agreement, provided that such license shall be only to the extent Contractor now has, or before the completion of full final settlements of agreement may acquire, the right to grant such license without becoming liable to pay compensation to others solely because of such grant.

The contractor further agrees that all material produced and/or delivered under this contract will not, to the best of the Contractor's knowledge, infringe upon the copyright, patent, or any other proprietary rights of any third party. Should any aspect of the materials become, or in the Contractor's opinion be likely to become, the subject of any infringement claim or suit, the Contractor shall procure the rights to such material or replace or modify the material to make it non-infringing?

8. DISCLOSURE OF CONFIDENTIAL INFORMATION

If either party to this agreement receives notice that a third-party requests divulgence of confidential or otherwise protected information and/or has served upon it a subpoena or other validly issued administrative or judicial process ordering divulgence of confidential or otherwise protected information that party shall promptly inform the other party and thereafter respond in conformity with such subpoena to the extent mandated by law. This section shall survive the termination or completion of this agreement. The parties agree that this section is subject to and superseded by Mississippi Code Ann. Section 25-61-1, *et seq.*

9. EXCEPTIONS TO CONFIDENTIAL INFORMATION

Contractor and the SCSD shall not be obligated to treat as confidential and proprietary any information disclosed by the other party ("the Disclosing Party") which (a) is rightfully known to the recipient before negotiations leading to this agreement, other than information obtained in confidence under prior engagements; (b) is generally known or easily ascertainable by non-parties of ordinary skill in the business of the customer; (c) is released by the Disclosing Party to any other person, firm, or entity (including governmental agencies or bureaus) without restriction; (d) is independently developed by the recipient without any reliance on confidential information; (e) is or later becomes part of the public domain or may be lawfully obtained by the SCSD or the Contractor from any non-party; or (f) is disclosed with the Disclosing Party's prior written consent.

10. MODIFICATION OR RENEGOTIATION

This agreement may be modified, altered or changed only by written agreement signed by the parties hereto. The parties agree to renegotiate the agreement if federal and/or State revisions of any applicable laws or regulations make changes in this agreement necessary.

11. REPRESENTATION REGARDING CONTINGENT FEES

The Contractor represents that it has not retained a person to solicit or secure a State contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except as disclosed in the Contractor's bid or proposal.

12. REPRESENTATION REGARDING GRATUITIES

The bidder, offeror, or Contractor represents that it has not violated, is not violating, and promises that it will not violate the prohibition against gratuities.

13. AVAILABILITY OF FUNDS

It is expressly understood and agreed that the obligation of the SCSD to proceed under this agreement is conditioned upon the appropriation of funds by the Mississippi State Legislature and receipt of state and/or federal funds. If the funds anticipated for the continuing fulfillment of the agreement are, at any time, not forthcoming or insufficient, either through the failure of the federal government to provide funds or of the State of Mississippi to appropriate funds or the discontinuance or material alteration of the program under which funds were provided or if funds are not otherwise available to the SCSD, the SCSD shall have the right upon ten (10) working days written notice to the Contractor, to terminate this agreement without damage, penalty, cost or expenses to the district of any kind whatsoever. The effective date of termination shall be as specified in the notice of termination.

14. STOP WORK ORDER

(1) *Order to stop work.* The Purchasing Agent of SCSD may by written order to the Contractor at any time, and without notice to any surety, require the Contractor to stop all or any part of the work called for by this contract. This order shall be for a specified period not exceeding 90 days after the order is delivered to the Contractor unless the parties agree to any further period. Any such order shall be identified specifically as a stop-work order issued according to this clause. Upon receipt of such an order, the Contractor shall forthwith comply with its terms and take all reasonable steps to minimize the occurrence of costs allocable to work covered by the order during the period of a work stoppage. Before the stop-work order expires, or within any further period to which the parties shall have agreed, the Business Office of SCSD shall either:

- (a) cancel the stop-work order; or
- (b) terminate the work covered by such order as provided in the Termination for Default Clause or the Termination for Convenience Clause of this contract.

(2) *Cancellation or Expiration of the Order.* If a stop-work order issued under this clause is canceled at any time during the period specified in the order, or if the period of the order or any extension thereof expires, the Contractor shall have the right to resume work. An appropriate adjustment shall be made in the delivery schedule or Contractor price, or both, and the contract shall be modified in writing accordingly, if:

- (a) the stop-work order results in an increase in the time required for, or in the Contractor's cost properly allocable to, the performance of any part of this contract; and
- (b) the Contractor asserts a claim for such an adjustment within 30 days after the end of the period of work stoppage; provided that, if the Procurement Officer of SCSD decides that the facts justify such action, any such claim asserted may be received and acted upon at any time before final payment under this contract.

(3) *Termination of Stopped Work.* If a stop-work order is not canceled and the work covered by such order is terminated for default or convenience, the reasonable costs resulting from the stop-work order shall be allowed by adjustment or otherwise.

(4) *Adjustment of Price.* Any adjustment in contract price made according to this clause shall be determined under the Price Adjustment Clause of this contract.

15. TERMINATION FOR DEFAULT

(1) *Default.* If the Contractor refuses or fails to perform any of the provisions of this contract with such diligence as will ensure its completion within the time specified in this contract, or any extension thereof otherwise fails to timely satisfy the contract provisions or commits any other substantial breach of this contract, the Purchasing Agent of SCSD may notify the Contractor in writing of the delay or

nonperformance and if not cured in ten days or any longer time specified in writing by the Purchasing Agent of SCSD, such officer may terminate the Contractor's right to proceed with the contract or such part of the contract as to which there has been a delay or a failure to properly perform. In the event of termination in whole or in part, the Purchasing Agent of SCSD may procure similar supplies or services in a manner and upon terms deemed appropriate by the Purchasing Agent of SCSD. The Contractor shall continue performance of the contract to the extent it is not terminated and shall be liable for excess costs incurred in procuring similar goods or services.

- (2) *Contractor's Duties.* Notwithstanding termination of the contract and subject to any directions from the Purchasing Agent of SCSD, the Contractor shall take timely, reasonable, and necessary action to protect and preserve property in the possession of the Contractor in which the SCSD has an interest.
- (3) *Compensation.* Payment for completed services delivered and accepted by the SCSD shall be at the contract price. The SCSD may withhold from amounts due to the Contractor such sums as the Purchasing Agent of SCSD deems to be necessary to protect the SCSD against loss because of outstanding liens or claims of former lien holders and to reimburse the SCSD for the excess costs incurred in procuring similar goods and services.
- (4) *Excuse for Nonperformance or Delayed Performance.* Except for defaults of Subcontractors, the Contractor shall not be in default because of any failure in performance of this contract under its terms (including any failure by the Contractor to make progress in the prosecution of the work hereunder which endangers such performance) if the Contractor has notified the Purchasing Agent of SCSD within 15 days after the cause of the delay and the failure arises out of causes such as acts of God; acts of the public enemy; acts of the State and any other governmental entity in its sovereign or contractual capacity; fires; floods; epidemics; quarantine restrictions; strikes or other labor disputes; freight embargoes; or unusually severe weather. If the failure to perform is caused by the failure of a Subcontractor to perform or to make progress, and if such failure arises out of causes similar to those set forth above, the Contractor shall not be deemed to be in default, unless the services to be furnished by the Subcontractor were reasonably obtainable from other sources in sufficient time to permit the Contractor to meet the contract requirements.

Upon request of the Contractor, the Purchasing Agent of SCSD shall ascertain the facts and extent of such failure, and, if such officer determines that any failure to perform was occasioned by any one or more of the excusable causes, and that, but for the excusable cause, the Contractor's progress and performance would have met the terms of the contract, the delivery schedule shall be revised accordingly, subject to the rights of the SCSD under the clause entitled

“Termination for Convenience.” (As used in this Paragraph of this clause, the term “Subcontractor” means Subcontractor at any tier).

- (5) *Erroneous Termination for Default.* If, after notice of termination of the Contractor’s right to proceed under the provisions of this clause, it is determined for any reason that the contract was not in default under the provisions of this clause, or that the delay was excusable under the provisions of Paragraph (4) (Excuse for Nonperformance or Delayed Performance) of this clause, the rights and obligations of the parties shall, if the contract contains a clause providing for termination for convenience of the SCSD, be the same as if the notice of termination had been issued according to such clause.
- (6) *Additional Rights and Remedies.* The rights and remedies provided in this clause are in addition to any other rights and remedies provided by law or under this contract.

16. TERMINATION FOR CONVENIENCE

(1) *Termination.* The Purchasing Agent of SCSD may, when the interests of the SCSD so require, terminate this contract in whole or in part, for the convenience of the SCSD. The Purchasing Agent of SCSD shall give written notice of the termination to the Contractor specifying the part of the contract terminated and when the termination becomes effective.

(2) *Contractor’s Obligations.* The Contractor shall incur no further obligations in connection with the terminated work and on the date set in the notice of termination the Contractor will stop work to the extent specified. The Contractor shall also terminate outstanding orders and subcontracts as they relate to the terminated work. The Contractor shall settle the liabilities and claims arising out of the termination of subcontracts and orders connected with the terminated work. The Purchasing Agent of SCSD may direct the Contractor to assign the Contractor’s right, title, and interest under terminated orders or subcontracts to the State. The Contractor must still complete the work not terminated by the notice of termination and may incur obligations as are necessary to do so.

17. E-VERIFICATION

The Contractor represents and warrants that it will ensure its compliance with the Mississippi Employment Protection Act, Mississippi Code Annotated §§ 71-11-1 and 71-11-3, and will register and participate in the status verification system for all newly hired employees. The term “employee” as used herein means any person that is hired to perform work within the State of Mississippi. As used herein, “status verification system” means the Illegal Immigration Reform and Immigration Responsibility Act of 1996 that is operated by the United States Department of Homeland Security, also known as the E-Verify Program, or any other successor electronic verification system

replacing the E-Verify Program. The Contractor agrees to maintain records of such compliance and, upon request of the State, to provide a copy of each such verification to the State. The Contractor further represents and warrants that any person assigned to perform services hereafter meets the employment eligibility requirements of all immigration laws of these warranties, the breach of which may subject the Contractor to the following:

- a. termination of this Agreement and ineligibility for any state or public contract in Mississippi for up to three (3) years with notice of such cancellation/termination being made public;
- b. the loss of any license, permit, certification, or other document granted to the Contractor by an agency, department or governmental entity for the right to do business in Mississippi for up to one (1) year; or,
- c. both.

In the event of such termination/cancellation, the Contractor shall also be liable for any additional costs incurred by the SCSD due to contract cancellation or loss of license or permit.

18. EQUAL OPPORTUNITY EMPLOYER

The Contractor shall be an equal opportunity employer and shall perform to all affirmative action and other applicable requirements; accordingly, the contractor shall neither discriminate nor permit discrimination in its operations or employment practices against any person or group of persons on the ground of race, color, religion, national origin, disability, or sex in any manner prohibited by law.

19. BOARD APPROVAL

It is understood that this contract is void and no payment shall be made if the Superintendent of Education and the Simpson County Board of Education do not approve this contract.

20. PERSONNEL

The contractor agrees that, at all times, the employees of the contractor furnishing or performing any of the services specified under this agreement shall do so in a proper, workmanlike, and dignified manner.

21. CONFIDENTIALITY

The Contractor shall agree to assure the confidentiality of any records obtained from the SCSD as required by state and federal privacy laws. No information, documents or other material provided to or prepared by the contractor deemed confidential by SCSD

according to state and federal privacy laws, shall be made available to any person or organization without the prior approval of the SCSD. Any liability resulting from the wrongful disclosure of confidential information on the part of the Contractor shall rest with the Contractor. This includes all student-related data and the contractor is required to comply with all Family Educational Rights and Privacy Act (FERPA) provisions.

22. INDEMNIFICATION

To the fullest extent allowed by law, the Contractor shall indemnify, defend, save and hold harmless, protect and exonerate the members of the Mississippi Board of Education, the SCSD, and its commission members, officers, employees, agents and representatives, and the State of Mississippi from and against all claims, demands, liabilities, suits, actions, damages, losses, and costs of every kind and nature whatsoever, including, without limitation, court costs, investigative fees and expenses, and attorneys' fees, arising out of or caused by the Contractor and/or its partners, principals, agents, employees and/or subcontractors in the performance of or failure to perform this agreement. In the State's sole discretion, the Contractor may be allowed to control the defense of any such claim, suit, etc. In the event the Contractor defends said claim, suit, etc., the Contractor shall use legal counsel acceptable to the State; the Contractor shall be solely responsible for all costs and/or expenses associated with such defense, and the State shall be entitled to participate in the said defense. The Contractor shall not settle any claim, suit, etc. without the SCSD's concurrence, which the SCSD shall not unreasonably withhold.

23. DEBARMENT AND SUSPENSION

The Contractor certifies that neither it nor its principals: (a) are presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any federal department or agency; (b) have, within a three (3) year period preceding this agreement, been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain or performing a public (federal, state or local) transaction or contract under a public transaction; violation of federal or state anti-trust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements or receiving stolen property; (c) are presently indicted of or otherwise criminally or civilly charged by a governmental entity with the commission of fraud of a criminal offense in connection with obtaining, attempting to obtain or performing a public (federal, state or local) transaction or contract under a public transaction; violation of federal or state anti-trust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements or receiving stolen property, and (d) have, within a three (3) year period preceding this agreement, had one or more public transaction (federal, state or local) terminated for cause or default. See Excluded Parties List System at www.epls.gov.

P. BILLING

All products will be provided once a signed purchase order is secured. All services will be provided once a signed purchase order is secured which indicates the dates of the service and the consultant performing the service is identified. The consultant and a school administrator must sign a verification form that indicates that the service is rendered for each date of service. One copy of this form must be provided to the Simpson County School District Business Office by the vendor within three days of the service being provided with the contractor retaining the second copy. To qualify for a day of work, the contractor must be on-site providing services for at least 7 hours. All travel costs and time will be absorbed as part of the contractor's daily fee.

Invoices are to be furnished for each project, along with documentation of services provided in the invoice (example: work reports, sign-in sheets, and agendas). The cut off on the invoice must be made to include the week ending closest to the end of the month. All invoices must indicate the total price of the items, resulting in the net price to be paid by the district. The district will pay all invoices within 45 days of the invoice being verified for completion. This completion will include the daily reports required and the verification form being matched to the invoice.

The successful firm shall report and in writing cancel within 30 days' notice if services provided in this proposal cannot be delivered.

Q. ROYALTIES AND PATENTS

The firm shall pay all royalties and license fees. The firm shall defend all suits or claims for infringement of any patent rights and shall hold the Simpson County School District harmless from such loss on account thereof.

R. INSURANCE REQUIREMENTS

The following insurance requirements must be met or the proposal will be considered incomplete and therefore rejected.

- (a) Commercial General Liability – Combined Single Limit for \$1,000,000.00 per occurrence with \$2,000,000.00 aggregate;
- (b) Commercial Auto Liability – Combined Single Limit in an amount of \$1,000,000.00;
- (c) Workers' Compensation and Employer's Liability Insurance:
Workers' Compensation Limits: Statutory-State of Mississippi.
Policies shall include a waiver of subrogation in favor of Simpson County School District.
- (d) Employers' Liability: \$100,000.00 Each Accident; \$500,000.00 Disease Policy Limit; \$1,000,000.00 Disease Each Employee; and

- (e) Proof of coverage must be placed on file with the school district by the Contractor and kept current throughout the term of this Contract.

Current insurance certificates shall be attached to the proposal.

(If the firm does not have the above insurances, a detailed explanation must be attached to the proposal of how any workers' compensation claims or liability issues will be addressed.)

S. DAMAGE CAUSED BY SUCCESSFUL BIDDER

The Simpson County School District will hold the successful firm responsible for damage caused to the buildings, fences, and other structures or assets of the Simpson County School District under all conditions.

T. As a bidding vendor, we understand that all of these provisions must be strictly complied with to fulfill the contract.

FIRM Franklin Covey Client Sales, Inc.

BY _____

TITLE Contract Specialist, Legal Services

PART VI

PART VI

**PROSPECTIVE CONTRACTOR'S REPRESENTATION REGARDING CONTINGENT
FEES**

The prospective contractor represents as a part of such contractor's bid or proposal that such contractor has () or has not () retained any person or agency on a percentage, commission, or other contingent arrangements to secure this contract.

_____	_____
Offeror Signature	Date

Title of Request for Proposal

PART VII

*Please check the appropriate response

Part VII

PROPRIETARY INFORMATION

The enclosed proposal does () or does not (✓) contain trade secrets or other proprietary data which the offeror wishes to remain confidential in accordance with Section 25-61-9 and 79-23-1 of the Mississippi Code.

If the enclosed proposal does include pages that the offeror wishes to designate as proprietary, please list page numbers below.

<hr/>	<hr/>
Offeror Signature	Date

Title of Request for Proposal

Request for Taxpayer Identification Number and Certification

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

► Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type.
See Specific Instructions on page 3.

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

Franklin Covey Client Sales, Inc.

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

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC ☒ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► _____
Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ►

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) 5

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

2200 W Parkway Blvd

6 City, state, and ZIP code

Salt Lake City, Utah 84119

7 List account number(s) here (optional)

Requester's name and address (optional)

Part I Taxpayer Identification Number (TIN)

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

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

____ - ____ - ____

or

Employer identification number

8 7 - 0 5 6 1 6 0 1

Part II Certification

Under penalties of perjury, I certify that:

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

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

Sign
Here

Signature of
U.S. person

Kim McQuiston

Date 1.6.2022

General Instructions

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

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

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

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

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

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



FRANCOV-01

RSMITH

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

5/9/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Diversified Insurance Group 136 E. South Temple, Suite 2300 Salt Lake City, UT 84111	CONTACT NAME: Ramona Smith	
	PHONE (A/C, No, Ext): (801) 325-5000 125	FAX (A/C, No): (801) 532-2804
	E-MAIL ADDRESS: rsmith@diversifiedinsurance.com	
	INSURER(S) AFFORDING COVERAGE	
	INSURER A: American Casualty Co. of Reading PA	
	INSURER B: Transportation Insurance Co	
INSURED FranklinCovey Co. and FranklinCovey Client Sales, Inc. 2200 West Parkway Blvd Salt Lake City, UT 84119	NAIC #	
	INSURER C: Continental Insurance Co.	
	INSURER D:	
	INSURER E:	
	INSURER F:	

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:			7015425931	9/1/2021	9/1/2022	EACH OCCURRENCE \$ 1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 200,000
							MED EXP (Any one person) \$ 15,000
							PERSONAL & ADV INJURY \$ 1,000,000
							GENERAL AGGREGATE \$ 2,000,000
							PRODUCTS - COMP/OP AGG \$ 2,000,000
B	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			7015433656	9/1/2021	9/1/2022	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000
							BODILY INJURY (Per person) \$
							BODILY INJURY (Per accident) \$
							PROPERTY DAMAGE (Per accident) \$
							Comp/Coll Deds \$ 1,000
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$
							AGGREGATE \$
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input checked="" type="checkbox"/> Y / <input checked="" type="checkbox"/> N If yes, describe under DESCRIPTION OF OPERATIONS below			7015424469	9/1/2021	9/1/2022	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER \$ 1,000,000
							E.L. EACH ACCIDENT \$ 1,000,000
							E.L. DISEASE - EA EMPLOYEE \$ 1,000,000
							E.L. DISEASE - POLICY LIMIT \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER

CANCELLATION

Simpson County School District Attn: Joanna Maddox, Purchasing Agent 111 Education Lane Mendenhall, MS 39111	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE 