

BLOOMINGDALE SCHOOL DISTRICT 13

PROPOSAL FOR CONSULTING SERVICES – FULL ENGAGEMENT PROGRAM

July 11, 2023

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SITUATION ANALYSIS

Bloomington School District 13 (hereinafter: D13) is seeking to engage the community in a collaboration to determine the future of their school district and potential community buy-in for the enhancements and investments necessary to achieve that vision. They are looking for a partner to help them conduct community engagement, generate a consensus plan, conduct an education campaign, and secure community support for the plan.

EOSullivan Consulting (hereinafter: EOS) is an Illinois-based firm that specializes in driving consensus. As a former state legislator, Ed Sullivan spent 14 years at the forefront of the toughest issue debates in Springfield, where he became known as the consensus-maker for bringing all parties together to achieve progress. Sullivan also spent 24 years leading in local government as an assessor, earning him the standing as one of the foremost property tax experts in Illinois. With a passion for improving education in our home state, EOS is excited for the opportunity to partner with D13.

WHY EOS?

EOS specializes in bringing school districts and their communities together. This is needed more than ever in this era of division, misinformation, and anger. We aren't just developing a winning plan and (if needed) passing a referendum—we're setting up school districts for long term success.

If you are simply looking for a consulting company to sell your plan to your community, we're happy to discuss how we could assist, but we are likely not the best option for you. Our main competitor uses "community engagement" language but really just tries to get your community on board with what you want. If this is what you prefer, we respect that.

If, instead, you are ready to truly engage your community, we are the best fit for you. We are called to districts that have seen the biggest challenges, the most division, and even multiple referendum failures in the past, because our process works. We bring your entire community together, helping each side listen to the other and collaborating on a consensus path forward that allows entire communities to celebrate their schools together.

In addition to being more affordable than our competition, there are three advantages that truly set us apart:

- We Are Local & Know Illinois: Not only are we located here in Illinois and invested in our home state, we have spent decades working in every community throughout this state. We know how the residents of your district think, what matters to them, and what will earn their support. None of our competitors can say that.
- We Bring Local Government & Political Experience: Our competitors come from other fields, like architecture firms and polling companies, and don't specialize in community engagement and political campaigns. The EOS-Cor partnership brings unmatched experience in all aspects of this process, allowing us to ensure every decision you make is one that will play favorably now and into the future.
- We Conduct True Community Engagement: Putting out a mail survey or holding a few sparsely attended committee meetings is not community engagement. We have developed a process that truly engages your entire community, not just those with ties to your district, so they feel fully involved in the process and you can confidently make decisions you know are aligned with your community's wishes.



OUR UNIQUE DATA GATHERING PROCESS

Our team of data experts are sought after nationally for their ability to accurately model public opinion and predict voter behavior, conducting data work for hundreds of clients including school districts, municipalities, colleges, and other government entities and civic organizations. This includes conducting nearly 250 surveys in the Chicagoland region.

These experts have developed a three-track process by which we gather data during community engagement, helping us engage as many district residents as possible while giving the board and administration the scientifically accurate data needed to make decisions.

- Intuitive: Nowadays, unfortunately, most people make decisions based on their intuition—their immediate, gut reactions. We must track the community's intuitive feelings throughout this process to know where people stand before being educated. We use several methods to gather this data, primarily scientific surveys.
- Informed: The more people become informed, the more they tend to be supportive. We need to identify how individuals feel after being educated so we can predict how public opinion will change as they learn more. We gather this data through multiple methods, especially a community committee.
- Passionate: Strongly passionate individuals in the community can influence others to their position. As a result, it is vital we identify the level of passion within segments of the community supporting or opposing specific things. This data is gathered throughout, though one of the best methods is through public forums.

OUR PROVEN COMMUNITY ENGAGEMENT APPROACH

Our approach is based on the tried-and-true engagement funnel, both to maximize community engagement and to arrive at a consensus final plan.

Phase 1: Engagement begins by making the public aware of the effort, educating them on the district's challenges and opportunities, and allowing them to provide general feedback so we can ensure their concerns are addressed and priorities included when we narrow feedback to specific projects.

Phase 2: We then work with the district and district's experts to create a menu of potential individual projects, infrastructure solutions, funding methods, and funding levels. We gather feedback from the community on each item contained in the menu to learn their priorities and willingness to fund a corresponding plan.

Phase 3: Armed with community feedback, we again work with the district and district's experts to narrow to specific options for the community to consider. This drives consensus on a final plan.

Phase 4: We publicize the final plan and conduct a community education program to educate the public on the plan, answer their questions, and motivate people to vote so their voices are heard.



THE METHODS WE WILL USE

Below is a detailed explanation of the methods we will use to conduct this community engagement effort. The exact plan will be customized in coordination with the district.

MESSAGING

It is imperative we consistently educate the public and influencers on the positive accomplishments of the district, the need to invest in the schools, and areas they would see improvement if those investments are made. This will lead to a stronger relationship between residents and their schools, increased favorability for the school district, and community investment in the engagement process and final plan.

To accomplish this, we will work with the district to develop effective messaging that will be used by all individuals and entities involved in this effort. We will provide direct support and training to ensure everyone is comfortable with the messaging and effective in its delivery. We will help the district engage key influencers directly so they are equipped to answer any questions they may receive. And we will assist the district in developing necessary marketing materials such as brochures, presentations, and a section on the district's website.

PUBLIC ENGAGEMENT

The public needs to see there are opportunities for them to attend engagement sessions, whether in person or virtual. For those who attend, these are excellent opportunities to be part of this community-driven effort. For those who do not attend, they are comfortable knowing the process was transparent and collaborative.

Engagement sessions are public, town hall style events held at various in-person locations as well as virtual and conducted on different days of the week and/or different times so all community members have the opportunity to attend. They start with a presentation based on the messaging, detailing the district's needs and challenges then presenting the potential projects, funding solutions, funding methods, and funding levels from the menu. Then there is a break where attendees can review boards with details for all projects under consideration and staff near to answer questions. The event then concludes with a public Q&A, and all attendees are encouraged to share their priorities and thoughts via digital and/or paper feedback forms.

COMMUNITY COMMITTEE

For this process to be successful, we need a committee of dedicated individuals who will provide direct input throughout the entire process. The committee will be made up of a cross-section of district stakeholders: parents, students, taxpayers without children in the schools, business leaders, teachers, and administration.

The committee will be tasked with the responsibility of actively gathering input from their contacts within the community and sharing that feedback with the district. We will hold at least one meeting of the community committee during each phase to provide them information, answer their questions, and solicit their feedback.

In Phase 4, once the plan is complete, oftentimes this committee transitions into a community-based committee to take the lead on informing the public of the final plan, especially if that plan becomes a referendum.



SCIENTIFIC SURVEY RESEARCH

A successful process and outcome is driven by unbiased data. Using surveys, we can gather that data in a way that accurately reflects the opinions of every member of the district. *(Note: Most of our clients prefer phone surveys for their accuracy and cost effectiveness, so that is what is included in this proposal. We have extensive experience conducting all types of surveys, including mail, text, and online, so if another method is preferred by the district we can adjust as necessary.)*

We recommend conducting two surveys. The first, called a menu survey, is taken during Phase 2. It tests opinions of the full list of potential projects, funding solutions, funding methods, and funding levels, both their individual levels of support and priority ranking. This survey also tests the favorability of the school district. The second, called an options survey, is taken during Phase 3. It tests the final options, both their individual levels of support and priority ranking.

FINAL PLAN & (IF NEEDED) REFERENDUM DEVELOPMENT

Equipped with the data from the public engagement, community committee, and survey research, we will work with the administration, the district's experts, and the board to determine the best possible course forward and finalize the plan. This includes determining funding options/levels and which projects should be funded.

Should a referendum be needed, we will work with the district's bond and local counsel to craft the ballot question. We will also help the district determine when to put the referendum on the ballot, using our knowledge of the political landscape and ability to predict the makeup of electorates.

COMMUNITY EDUCATION

Once the plan is finalized by the administration and board, we must actively work to educate the public on how this community-driven plan was developed, the challenges the plan overcomes, and the benefits the plan will achieve for students and the community.

Working with the district, we will directly engage the public using a variety of methods. This includes a series of in person and virtual town hall style events open to all members of the public. It includes tours of the district's facilities most impacted by the plan. It includes scheduling district representatives to speak at local government, civic organization, and community group meetings. And it includes providing information directly to school-related organizations, such as PTAs, booster clubs, and foundations.

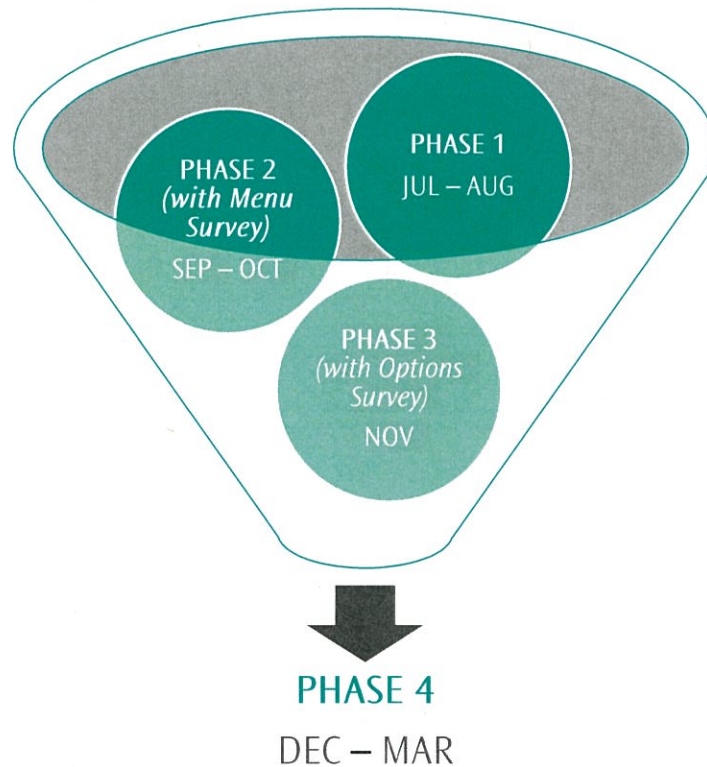
COMMUNICATIONS & MARKETING

Unfortunately, because members of the public lead busy lives, they often don't have time to come to you for information—you must bring your information to them as conveniently and concisely as possible. That is why we must conduct effective communications and marketing efforts to ensure our informational message is heard by as many residents as possible.

We will work with the district to develop a plan, budget, and calendar for these outreach efforts. This plan will utilize the district's current communications channels, including newsletters, emails, social media, fliers, and articles. The plan will also include paid channels such as detailed mailings, interactive tele town halls, and social media boosts, if budget allows since these channels have associated costs.



TIMELINE & DELIVERABLES



Note: Based on scheduling of public presentations and board meetings, the timeline could alter in detail but not in substance. A more detailed timeline will be developed in partnership with the district.

PHASE 1 (JULY – AUGUST)

- Develop Community Engagement Messaging
- Actively Push Messaging Internally and Externally
- Create Community Committee
- Hold 1st Meeting of Community Committee, with Presentation Based on Messaging
- Put Presentation from 1st Committee Meeting on Website Along with Feedback Form
- Actively Encourage Members of the Public to Provide Their Feedback Via the Online Feedback Form
- Develop Report of Phase 1 Activities to Inform Phase 2 Activities
- (Administration) Report to Board on Phase 1 Activities at Public Board Meeting

PHASE 2 (SEPTEMBER – OCTOBER)

- Develop Menu of Potential Projects, Infrastructure Solutions, Funding Levels, & Funding Mechanisms
- Hold 2nd Committee Meeting, with Presentation Based on Menu
- Execute Menu Survey
- Put Presentation from 2nd Committee Meeting on Website Along with Feedback Form
- Hold 3-5 Public Engagement Sessions



- Develop Report of Phase 2 Activities to Inform Phase 3 Activities
- (Administration) Report to Board on Phase 2 Activities at Public Board Meeting

PHASE 3 (NOVEMBER)

- Develop 3 Options at Various Funding Levels (low/medium/high)
- Hold 3rd Committee Meeting, with Presentation on 3 Options
- Execute Options Survey
- Develop Report on Phase 3 Activities to Inform Final Plan
- (Administration) Report to Board on Phase 3 Activities at Public Board Meeting

PHASE 4 (DECEMBER – MARCH)

- Develop Final Plan with List of Projects & Corresponding Funding
- (If Needed) Develop Ballot Question
- Develop Informational Messaging
- Hold 4th Committee Meeting, with Presentation on Final Plan Based on Informational Messaging
- Publicize Final Plan Using Informational Messaging
- Board Publicly Deliberates and Approves Final Plan & (If Needed) Ballot Question
- Conduct Community Education Program

EOS TEAM

EOS has an entire team, internal and external, that works together to provide the services detailed in this agreement. For ease of communication, the below team members have been assigned as the primary points of contact for the roles listed and they will communicate with the rest of our team as needed. EOS retains the right to adjust our team as necessary to ensure we are providing the best possible support to our clients.

- | | |
|--|--|
| • Ed Sullivan: Strategy & Messaging | • Ryan Kilduff: Operations |
| • Collin Corbett: Strategy & Messaging | • Lane Davis: Communications & Content |
| • Rich Carter: Community Engagement | • Abe Levy: Data & Technology |

EOS REFERENCES

- Dr. Terri Bresnahan | 847.593.4300 | Bresnahan.terri@ccsd59.org
Superintendent of Berkeley School District 87 During Successful Referendum
- Dr. Jeff Schuler | 630.682.2002 | jeff.schuler@cusd200.org
Superintendent of Wheaton Community Unit School District 200 During Successful Referendum
- Dr. Kaine Osburn | 847.251.3587 | osburnk@avoca37.org
Superintendent of Lake Zurich Community Unit School District 95 During Successful Referendum
- Dr. Brian Harris | 630.639.9874 | llinibri87@gmail.com
Superintendent of Barrington Community Unit 220 School District During Successful Referendum
- Dr. Mary Ticknor | 630.243.3260 | mticknor@lhs210.net
Superintendent of Lemont Township High School District 210 During Successful Referendum



PROJECT COST

Billing structure to be determined in consultation with client. We can break down billing monthly, by project, or lump sum.

Total Cost: \$75,000 for Consulting, Plus \$10,000 for Surveys

Cost By Project:

- Public & Committee Engagement: \$25,000
- Messaging: \$20,000
- Final Plan & (If Needed) Referendum Development: \$10,000
- Community Education: \$20,000
- Surveys: \$10,000 for 2 Automated Phone Surveys with Modeling/Weighting

Note on Services: Covered in this Agreement is the cost of our time, expertise, and travel expenses, plus the cost for surveys. Not covered is any additional paid outreach the district wishes to pursue, such as mailings, texting, digital ads, etc. Should these services be needed, we will provide pricing and a detailed budget for the district to approve prior to any expenditures.

TERMS

- All pricing good for 45 days from date of proposal.
- Agreement terms are from date of signature until project completion.
- Client will be billed based on determination between EOS and D13, to be agreed upon in writing.
- Client will reimburse EOS for mutually agreed upon expenses. Expenses will be included on the following invoice. Proper documentation of each expense will be available at any time upon request.
- D13 and EOS reserve right to terminate this Agreement with 30 days' notice without cause.

CONDITIONS

- Completion of projects contingent on timely communication from client.
- During the term of this Agreement, EOS and its employees will not perform services, whether compensated or voluntary under the employment of EOS or independently, that shall conflict with any activities of D13 or cause to sully the goodwill of, or put into disrepute, D13 or its agents or clients.
- In the performance of its services, EOS shall comply with all laws applicable to the performance of such services and otherwise applicable to D13, its board members and employees, including, but not limited to, the State Ethics Act and laws governing lobbying, political activities, and the use of public funds. EOS shall comply with any D13 Board Policies regulating ethics and gift bans.
- All information and materials related to D13 and its operations are the property of D13 and will be treated as confidential information; EOS will not disclose any confidential information during or after the terms of this Agreement.
- Both parties agree that the duties and services outlined in this Agreement do not include any type of lobbying and/or government relations activities with the State of Illinois. If both parties agree that lobbying services are needed, then a separate and independent agreement would be executed and both parties would register with the Illinois Secretary of State's office, Index Division and follow all applicable Illinois laws and regulations.



- Client agrees to allow reasonable use of its name and work resulting from this Agreement for EOS's promotional efforts.
- Each Party ("the Indemnitor") will defend, indemnify, and hold harmless the other Party, the other Party's affiliates, subsidiaries, and related companies, and its trustees, members, officers, directors, agents, representatives, and employees, and each of their respective successors (collectively, the "Indemnitees") against any and all third party claims, suits, losses, damages, suits, fees, judgments, costs, and expenses (collectively referred to as "Claims"), including reasonable attorney's fees incurred in responding to such Claims, caused by any act, omission, negligence, or breach of this Agreement by the Indemnitor in connection with the performance of the Services.
- In no event shall either party be liable to the other for special, indirect, incidental, or consequential damages, including, without limitation, loss of use or loss of profits, regardless of whether such damages are caused or allegedly caused by breach of Agreement, tort or otherwise (including negligent or willful act or omission, warranty, indemnity, or strict liability).
- **Certifications.** As required by the Criminal Code, 720 ILCS 5/33E-11, by executing this Agreement, EOS certifies that it is not barred from contracting with any unit of State or local government as a result of a violation of any criminal statute including, but not limited to, the bid rigging (Section 33E-3) or bid rotating (Section 33E-4) provisions of the Criminal Code. EOS agrees that if this certification is false, D13 may declare the Agreement void. EOS further certifies that it will provide a drug free workplace as required by the Illinois Drug Free Workplace Act, 30 ILCS 580/1 et seq.
- **Equal Employment Opportunity.** EOS agrees to fully comply with the requirements of the Illinois Human Rights Act, 775 ILCS 5/1-101 et seq., including, but not limited to, the provisions of sexual harassment policies and procedures pursuant to Section 2-105 of the Act. EOS further agrees to comply with all federal Equal Employment Opportunity Laws, including, but not limited to, the Americans with Disabilities Act, 42 U.S.C Section 1201 et seq., and rules and regulations promulgated thereunder.
- As required by Illinois law, in the event of EOS's non-compliance with the provisions of this Equal Employment Opportunity Clause, the Illinois Human Rights Act or the Rules and Regulations of the Illinois Department of Human Rights ("Department"), EOS may be declared ineligible for future contracts or subcontracts with the State of Illinois or any of its political subdivisions or municipal corporations, and the Agreement may be canceled or voided in whole or in part, and such other sanctions or penalties may be imposed or remedies invoked as provided by statute or regulation. During the performance of this Agreement, EOS shall agree as follows:
 - a. That it will not discriminate against any employee or applicant for employment because of race, color, religion, sex, sexual orientation, marital status, national origin or ancestry, citizenship status, age, physical or mental handicap unrelated to ability, military status, or an unfavorable discharge from military service or arrest record status; and further that it will examine all job classifications to determine if minority persons or women are underutilized and will take appropriate affirmative action to rectify any such underutilization.
 - b. That, if it hires additional employees in order to perform this contract or any portion thereof, it will determine the availability (in accordance with the Department's Rules) of minorities and women in the areas from which it may reasonably recruit and it will hire for each job classification for which employees are hired in such a way that minorities and women are not underutilized.
 - c. That, in all solicitations or advertisements for employees placed by it or on its behalf, it will state that all applicants will be afforded equal opportunity without discrimination because of race, color, religion, sex, sexual orientation, marital status, national origin or ancestry, citizenship status, age, physical or mental handicap unrelated to ability, military status, or an unfavorable discharge from military service.



- d. That it will send to each labor organization or representative of workers with which it has or is bound by a collective bargaining or other agreement or understanding, a notice advising such labor organization or representative of EOS's obligations under the Illinois *Human Rights Act* and the Department's Rules. If any such labor organization or representative fails or refuses to cooperate with EOS in its efforts to comply with such Act and Rules, EOS will promptly so notify the Department and D13 and will recruit employees from other sources when necessary to fulfill its obligation thereunder.
 - e. That it will submit reports as required by the Department's Rules, furnish all relevant information as may from time to time be requested by the Department or D13, and in all respects comply with the Illinois *Human Rights Act* and the Department's Rules.
 - f. That it will permit access to all relevant books, records, accounts and work sites by personnel of D13 and the Department for purpose of investigation to ascertain compliance with the Illinois *Human Rights Act* and the Department's Rules.
 - g. That it will include verbatim or by reference the provisions of this clause in every subcontract it awards under which any portion of the contract obligations are undertaken or assumed, so that such provisions will be binding upon such sub. In the same manner as with other provisions of the Agreement, EOS will be liable for compliance with applicable provisions of this clause by such sub; and further it will promptly notify D13 and the Department in the event any sub fails or refuses to comply therewith. In addition, EOS will not utilize any sub declared by the Illinois Human Rights Commission to be ineligible for contracts or subcontracts with the State of Illinois or any of its political subdivisions or municipal corporations.
- This typewritten Agreement constitutes the entire Agreement of the Parties and supersedes all prior or contemporaneous written or oral negotiations, correspondence, understandings, and agreements, between the Parties respecting the subject matter hereof. Any changes, additions, stipulations, or deletions including correcting lining out by any party to this Agreement or signator to this Agreement will not be considered agreed to or binding on any party unless such modifications have been initialed or otherwise approved in writing by all parties to this Agreement. No waiver of any of the provisions of this Agreement shall be deemed, or shall constitute, a waiver of any other provisions, whether or not similar, nor shall any waiver constitute a continuing waiver. No waiver shall be binding unless executed in writing by the party making the waiver.

ACCEPTANCE

In Witness Whereof, the parties hereto agree to the deliverables, scope, cost, and terms & conditions of this Agreement. Client representative is duly authorized to enter into this Agreement.

EOSULLIVAN CONSULTING

BLOOMINGDALE SCHOOL DISTRICT 13

Signature: _____

Signature: _____

Printed Name: _____

Printed Name: _____

Title: _____

Title: _____

Date: _____

Date: _____

