



April 1, 2010

Mr. Chris G. Dubois  
Superintendent  
Crockett County Consolidated CSD  
P.O. Box 400  
Ozona, TX 76943-0400

**Re:** Administrator Leadership Training and Development

Dear Mr. Dubois:

Thank you for your interest in an engagement of CHORUS<sup>®</sup>, Inc. to provide executive leadership assessment and development for you and six members of your central office and administrative team at Crockett County Consolidated CSD. This proposal outlines CHORUS services and cost considerations. If you are in agreement with the project scope and approach detailed in this proposal, once signed, it can serve as a Letter of Engagement (LOE) outlining CHORUS' services to Crockett County Consolidated CSD and the terms of services being provided. Any changes in this agreement need to be done in writing and signed by both parties.

### **PROJECT SCOPE**

This project includes a thorough assessment of the leadership competencies of seven leaders in Crockett County Consolidated CSD. This will be followed by a group interpretation session/leadership retreat conducted with your team and other leaders in the San Angelo Region and will include the completion of an individualized professional development plan that each leader can begin implementing immediately at the conclusion of the session. Following this retreat will be an in-depth executive coaching session with each participant to further review their results and confirm their development plan in the initial stage of this effort. Following this initial stage, targeted training and development will be designed and administered to participants based on the aggregate assessment results and will include in-person and web-based experiences for the leadership team designed to assist you in maximizing District goals and objectives. (If desired, additional coaching and development as part of an employee progress plan based on development needs identified during the assessment process can also be conducted on an as-needed basis.) The scope of involvement encompassed by this LOE includes the following three phases:

#### **Phase I: Leadership Assessment, Analysis, Interpretation & Plan Development**

- *Project Orientation*– CHORUS will conduct an initial interview (by phone) with Mr. Dubois to gain an initial perspective of challenges facing the District and to understand key dynamics with the Central Office and Administrative Team.
- *Project Introduction*– CHORUS will conduct an initial orientation (via conference call) with participants to introduce the program, provide an overview of the assessment process and follow-up activity and answer any questions participants may wish to ask. (CHORUS will provide Conference Bridge services if it is not convenient for participants to be in the same location at the preferred time of the call.) Following this orientation, each participant will receive an executive overview of the process to reinforce key themes and additional background information regarding the Hallmarks of Excellence<sup>®</sup> in Educational Leadership model and process they will be experiencing.

- Assessment – CHORUS will administer the Hallmarks of Excellence® in Educational Leadership to seven leaders in Crockett County Consolidated CSD. The Hallmarks® consists of an assessment regimen that contains four scientifically validated instruments. The assessment is designed to capture the attributes that define excellence in leadership. First, a series of four instruments is completed that assess critical characteristics required of high performance leaders. Then, based on an assessment of the individual’s pattern of personal competencies, personal qualities, critical thinking skills and emotional intelligence, an integrated analysis is provided that contrasts the educator’s profile to performance attributes of proven high performance leaders.
- Individual Results Analysis and Report – CHORUS will analyze the results from each Hallmarks assessment and prepare a written report of the individual findings that identifies the strengths, key competencies, and any limitations requiring targeted training and development. Each participant will receive (at the leadership retreat—actual date to be determined) an individualized, Hallmarks Personal Results Workbook containing their unique assessment results, along with a Hallmarks Personal Results Worksheet.
- Review Findings & Proposed Plan with Superintendent – A 90-minute teleconference and web meeting will be conducted with participating Superintendents to review a comprehensive report containing the aggregate results of the San Angelo regional effort and an analysis of that information (individual participant results will not be shared). This report (which will be provided in advance of the teleconference) will provide detailed feedback regarding the leadership strengths and developmental gaps of the participating leaders including specific areas of strength to leverage and developmental gap areas that require further development. Discussion of findings and recommended training and development will be reviewed during this call and Superintendent participation guidance for their role in the Leadership Retreat will be presented. District-specific aggregate results that substantively differ from the regional aggregate results will be addressed with each Superintendent in an individual call following this session if necessary.
- Leadership Retreat & Executive Findings – CHORUS will provide a one-day (9:00 a.m.-4:00 p.m., including lunch) leadership retreat that consists of a group interpretation of assessment findings and additional leadership development experiences. After providing each leader with an individualized Hallmarks report, this session will equip the leaders to interpret their findings and understand their own individualized leadership strengths and gaps. The findings will be used to assist each leader in understanding how one’s unique strengths and gaps impact their performance and the impact in a team environment. Each leader’s results will show a comparison of his/her findings to top performing leaders and provide tailored insights and action steps designed to improve leadership effectiveness and overcome the impediments to extraordinary performance. In addition to personal insights, the plenary portion of this experience accelerates the leaders’ ability to begin gaining a common “language” pertaining to leadership and leadership dynamics in their own District.

This one-day session utilizes an intensive, interactive group format for exploring the Hallmarks framework and the participating leaders’ findings. Integrated into this session is a personal development planning process where each leader will create an action plan they can begin using immediately for their own development. The session is uniquely designed to ensure that confidential individual results from the assessment process are not shared unless an individual desires to share that information in discussion.

- Individual Executive Coaching Session–During this phase of the effort, CHORUS will conduct a one-on-one executive coaching and development session for each of the seven participating educators. The session is based on each individual leader’s assessment results and the overarching training objectives that need to be accomplished to maximize their effectiveness within their unique leadership role in the District. Furthermore, this session will ensure a thorough understanding of the participant’s assessment results and assist the leader in finalizing his/her personal development plan. This session (lasting approximately 60 minutes in length) will be conducted via a web-based teleconference which will require no travel for the participant.

- *Presentation to Board of Education (Optional)* – CHORUS will (at the discretion of each participating Superintendent), prepare and present via teleconference to Board of Education members of participating school districts in the San Angelo region, an executive overview of the Hallmarks of Excellence® in Educational Leadership and the aggregate findings for the San Angelo region. Included in this presentation will be an overview of the recommended training and development resulting from the analysis. This presentation, designed to last approximately 45 minutes, will equip Board members with an in-depth understanding of the assessment and development process and is designed to answer any questions they may have. Prior to this session, an executive overview of the Hallmarks® assessment and professional development process will be provided to each Superintendent to provide to their Board members as an introduction to this teleconference (if desired).

## **Phase II: Training Modules and Cluster Group Coaching**

Over a six-month period, three additional separate regional on-site plenary training modules, two web-based 90 minute group coaching sessions and one 30-minute individual progress coaching session will be conducted. Several of these sessions will include brief pre-work to acclimate participants to the learning objectives and to maximize the effectiveness of their training and development experience.

- *Plenary Training Modules* – These three modules that follow the initial leadership retreat will focus on specific training and development areas as identified in the aggregate analysis in order to strengthen individual and team effectiveness and maximize the leaderships’ ability to achieve District goals and objectives as determined by the Superintendent and the School Board. Training and development content will focus on each of the three Hallmarks® Leadership Fundamentals and, along with other areas, will include:
  - Assisting administrators in their efforts to “lead people and manage results”
  - Equipping leaders to assertively and persuasively inspire those they lead so they can maximize the ability to achieve results from a dynamic shared vision
  - Learning how to coach high performance teams so each leader can mobilize resources and people to achieve measureable results while promoting a culture of accountability at the departmental, school and district level to maximize individual and team ownership of results

These sessions will be highly interactive and include workbooks and other training materials that can serve as ongoing reference tools.

- *Web-based Group Coaching* – In addition to the initial one-day retreat and three additional regional in-person plenary sessions, two web-based group coaching sessions will be conducted for all seven participating members of the Crockett County Consolidated CSD leadership team. (Each participant will be assigned a cluster group which will include leaders from other districts participating in this pilot effort.) These interactive sessions will last approximately 90 minutes and will be conducted utilizing a web-based conferencing format so educators can participate from their offices. Webinar content will be integrated with the modules previously described and will include opportunities for participants to leverage training content to recalibrate their unique professional development action plans.
- *Individual Progress “Check-in” Coaching Session* – In addition to the previous extended coaching session provided under Phase I, CHORUS will also provide an individual one-on-one “check-in” coaching session for all seven participating leaders. The focus of this session will be to monitor the progress of each leader, provide clarity where needed and to answer any questions participants may have as they further refine their development plan to maximize their effectiveness in their unique role in their district.
- *Superintendent Individual Executive Coaching Session* – To assist the Superintendent in his/her efforts to provide coaching assistance from within the District management framework, the CHORUS consultant will provide development insights and approaches to assist Mr. Dubois as he works to maximize the Crockett County Consolidated CSD team’s long-term success while still maintaining confidentiality standards to protect the coaching relationship.\*

*\*Specialized Options—Employee Progress Plan & Development – If certain educators need additional employee plan assistance, additional coaching and development will be provided on an as needed basis and can be quoted in a “packaged” arrangement or on a per coaching session basis.*

### **III. Customized Follow-up**

Additional services are available and can be provided by CHORUS and its certified coach network as needed. These services can include team retreats, strategic planning, and employee performance programs for leaders needing special assistance to achieve desired school or District objectives.

### **COMPENSATION CONSIDERATIONS**

The cost of services totals \$19,675 for Phase I and Phase II. The quoted amount is all inclusive and consists of all assessment instrument costs, individual report analysis and preparation, meeting, training and consulting fees, training materials, conference bridge and web-based services for remote sessions, all CHORUS® travel expenses associated with the deliverables as detailed in this regional effort and meals and refreshments for the in-person plenary sessions. Costs that will be the responsibility of Crockett County Consolidated CSD include individual participant travel expenses related to the in-person plenary sessions and for participant long-distance charges (if applicable) for the group coaching and or individual sessions. For budgeting purposes, 10% of the project total will be invoiced May 15, 2010, 15% will be invoiced July 1, 2010, 25% will be invoiced August 1, 2010, 25% will be invoiced October 1, 2010 and the remaining 25% invoiced December 1, 2010. Payment terms are Net 30.

If additional participants are added over the current level of seven, the additional incremental cost per additional participant is \$1,975 per additional participant.

### **DELIVERY TIMELINE**

To assist in detailed planning, the following timeline will be utilized for the project. The target date marked with TBD (To Be Determined) will be arranged individually with each District participant and coordinated through the Superintendent’s office.

<b>Target Date</b>	<b>Activity</b>	<b>District Participant(s)</b>	<b>Time Requirement of Participants</b>
<b>TBD April/May 2010</b>	Initial conference call with Chris Dubois re: Project Orientation	<ul style="list-style-type: none"> <li>▪ Chris Dubois</li> </ul>	As Needed
<b>TBD June 2010</b>	Participant orientation to review program and answer questions	<ul style="list-style-type: none"> <li>▪ Leadership Team</li> </ul>	30 Minutes by teleconference
<b>TBD June 2010</b>	Hallmarks® Assessment is administered via web-based CHORUS Assessment Center™	<ul style="list-style-type: none"> <li>▪ Leadership Team</li> </ul>	90 Minutes to 2 Hours
<b>TBD July 2010</b>	Review findings and proposed plan with Superintendents (9:00 am-10:30 a.m. Central Time)	<ul style="list-style-type: none"> <li>▪ Chris Dubois and other San Angelo Superintendents</li> </ul>	90 Minutes (via teleconference)
<b>TBD July 2010</b>	Leadership Retreat at TBD with all Administrators from participating school districts (9:00 am-4:00 pm)	<ul style="list-style-type: none"> <li>▪ Leadership Team</li> </ul>	7 Hours (9:00 a.m.-4:00 p.m. includes lunch)
<b>8/5/10 – 8/20/10</b>	One-on-one in-depth executive coaching session (Via web-based conference call)	<ul style="list-style-type: none"> <li>▪ 7 Leaders</li> </ul>	60 Minutes (Per session for each participant. Participants may invest additional time, as they desire, to prepare for this session)
<b>TBD August or September 2010</b>	CHORUS provides executive overview to Board of Education members of participating districts (if desired by Superintendent)	<ul style="list-style-type: none"> <li>▪ Board of Education Members</li> </ul>	45 Minutes for teleconference

Target Date	Activity	District Participant(s)	Time Requirement of Participants
TBD September 2010	CHORUS provides Plenary Training Module 1- Mastering Your Core—Becoming an Emotionally Intelligent School Administrator (9:00 am-2:00 pm)	<ul style="list-style-type: none"> <li>▪ Leadership Team</li> </ul>	5 Hours (9:00 am-2:00 pm includes lunch)
TBD October 2010	Cluster Group Web-based Coaching Session 1	<ul style="list-style-type: none"> <li>▪ Leadership Team</li> </ul>	30 Minutes (reading/preparation prior to session) 90 Minutes for actual webinar
TBD November 2010	Plenary Training Module 2-Forging the Path— Inspiring a Strategic Mindset (9:00 am-2:00 pm)	<ul style="list-style-type: none"> <li>▪ Leadership Team</li> </ul>	5 Hours (9:00 am-2:00 pm includes lunch)
TBD December 2010	Cluster Group Web-based Coaching Session 2	<ul style="list-style-type: none"> <li>▪ Leadership Team</li> </ul>	30 Minutes (reading/preparation prior to session) 90 Minutes for actual webinar
TBD January 2011	Plenary Training Module 3-Ensuring Execution— Inspiring a Culture of Accountability Through Effective Team Leadership (9:00 am-4:00 pm)	<ul style="list-style-type: none"> <li>▪ Leadership Team</li> </ul>	7 Hours (9:00 am-4:00 pm includes lunch)
TBD January	Individual Progress “Check-In” Coaching Session	<ul style="list-style-type: none"> <li>▪ Leadership Team</li> </ul>	30 Minutes
TBD January or February 2011	Superintendent Individual Executive Coaching Session	<ul style="list-style-type: none"> <li>▪ Chris Dubois</li> </ul>	1 Hour

*\*Leadership Team denotes all seven leaders*

**TREATMENT OF INTELLECTUAL PROPERTY & CONFIDENTIALITY**

By signing this agreement, Crockett County Consolidated CSD understands and agrees to the following Intellectual Property Rights and Confidentiality Statements:

- **Confidentiality of Assessment Results and Related Data.** It is the policy and practice of CHORUS to consider all individual assessment results as Confidential. As a matter of practice, individual assessment information in its entirety will be reviewed only by CHORUS or a CHORUS Certified and Authorized Coach. Only summary information of an individual's results will be shared with the individual's line management. Crockett County Consolidated CSD agrees not to reproduce any regional, district or individual information without the applicable prior written consent of CHORUS, not to use the Information except in the performance of this Agreement, and not to disclose all or any part of the Information in any form to any third party (including members of the media), either during or after the term of this Agreement. Any variation from this policy shall require written approval of the assessed individual which expressly grants permission for personal information to be shared with anyone besides the individual. Crockett County Consolidated CSD and its employees and Board of Education members agree that any information to which they are privy will only be shared with individuals within their district on a “need to know” basis and will not be shared with a third-party outside their district without the express written permission of CHORUS, Inc.
  
- **Intellectual Property Rights.** Crockett County Consolidated CSD expressly acknowledges that all materials and ideas in whatever form or media created or developed by CHORUS® Inc. pursuant to or related to work performed under this LOE including but not limited to the Hallmarks of Excellence® in Educational Leadership assessment processes, approaches and training and development materials are the exclusive property of CHORUS and cannot be reproduced or distributed to other parties without the express written permission of an Officer of CHORUS, Inc.

If this LOE appropriately addresses the terms of the engagement, please print and sign the acceptance of this agreement and either fax or scan and email it to the attention of Ms. Kim Mendez (fax #317-687-6056 or email [kmendez@chorusinc.com](mailto:kmendez@chorusinc.com) ). Any changes to this LOE need to be in writing and signed by both parties. If you have any questions Mr. Dubois, please feel free to contact me. We look forward to working with you and the rest of your leadership team in the Crockett County Consolidated CSD.

Sincerely,

CHORUS, Inc.



Michael A. Evans  
President & CEO

Enclosure(s)

### ACCEPTANCE OF THIS AGREEMENT

**CHORUS, Inc.**

 Date: 4/11/10

Mr. Michael A. Evans  
President & CEO  
CHORUS, Inc.

**Crockett County Consolidated CSD**

\_\_\_\_\_ Date: \_\_\_\_\_

Mr. Chris G. Dubois  
Superintendent  
Crockett County Consolidated CSD