

Board Office Use: Legislative File Info.	
File ID Number:	14-1226
Introduction Date:	06/25/2014
Enactment Number:	
Enactment Date:	



Memo

To: Board of Education

From: GARY YEE, EdD, ACTING SUPERINTENDENT; By: MARIA SANTOS, Deputy Superintendent

Board Meeting Date: 06/25/2014

Subject: Professional Service Contract

Contractor: Jeanne McGee of Vancouver, WA

Services for: 922-FAMILY, SCHOOL AND COMMUNITY PARTNERSHIPS

Board Action Requested and Recommendation: Ratification by the Board of Education of a Professional Services Contract between the District and Jeanne McGee, Vancouver, WA, for the latter to provide: 80 hours to Family, School and Community Partnerships staff to review, edit and/or write the annual Health & Wellness Guide and communication documents related to the revised Wellness Policy. for the period of 05/15/2014 through 06/30/2014 in an amount not to exceed \$6,000.00.

Background:
(A one paragraph explanation of why the consultant's services are needed.)

While OUSD ensures that written communications are shared with families in their primary language, more support is needed around writing in ways that make the information clear and accessible. While this is especially critical when we are asking parents/guardians to consent for medical services (e.g. Tdap, Big Smiles, Breathmobile), these skills are integral to fully informing families about the opportunities for their students within OUSD.

Discussion:
(QUANTIFY what is being purchased.)

80 hours to Family, School and Community Partnerships staff to review, edit and/or write the annual Health & Wellness Guide and communication documents related to the revised Wellness Policy.

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Fiscal Impact: Funding resources below not to exceed \$6,000.00

\$1,000.00 Alam.Cty.Pub.Health-Health&Wel

\$5,000.00 BECHTEL

Attachments: Professional Services Contract including Scope of Work
Waiver Summary
Resume / Statement of Qualifications
EPLS Search Results Page
Insurance Certification (if no Waiver was granted)

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OAKLAND UNIFIED
SCHOOL DISTRICT

PROFESSIONAL SERVICES CONTRACT 2013-2014

This Agreement is entered into between Jeanne McGee
(CONTRACTOR) and Oakland Unified School District (OUSD). OUSD is authorized by Government Code Section 53060 to contract for the furnishing of special services and advice in financial, economic, accounting, engineering, legal, and administrative matters with persons specially trained, experienced, and competent to perform such services. CONTRACTOR warrants it is specially trained, experienced, and competent to provide such services. The parties agree as follows:

- Services:** CONTRACTOR shall provide the ("Services" or "Work") as described in **Exhibit "A,"** attached hereto and incorporated herein by reference.
- Terms:** CONTRACTOR shall commence work on 05/15/2014, or the day immediately following approval by the Superintendent if the aggregate amount CONTRACTOR has contracted with the District is below \$84,100.00 in the current fiscal year; or, approval by the Board of Education if the total contract(s) exceed \$84,100.00, whichever is later. The work shall be completed no later than 06/30/2014.
- Compensation:** OUSD agrees to pay CONTRACTOR for services satisfactorily rendered pursuant to this Agreement. The compensation under this Contract shall not exceed six thousand Dollars (\$6,000.00) [per fiscal year], at an hourly billing rate not to exceed \$75.00 per hour. This sum shall be for full performance of this Agreement and includes all fees, costs, and expenses incurred by Contractor including, but not limited to, labor, materials, taxes, profit, overhead, travel, insurance, subcontractor costs, and other costs.

If CONTRACTOR will be compensated hourly for services provided under this Contract, CONTRACTOR shall describe in Exhibit "A," attached hereto, the specific scope of services to be delivered on an hourly basis to OUSD.

OUSD shall not be liable to CONTRACTOR for any costs or expenses paid or incurred by CONTRACTOR in performing services for OUSD, except as follows: There will be no expenses outside of the contract.

Payment for Work shall be made for all undisputed amounts in monthly installment payments within forty-five (45) days after CONTRACTOR submits an invoice to OUSD for Work actually completed and after OUSD's written approval of the Work, or the portion of the Work for which payment is to be made.

The granting of any payment by OUSD, or the receipt thereof by CONTRACTOR, shall in no way lessen the liability of CONTRACTOR to correct unsatisfactory work, although the unsatisfactory character of that work may not have been apparent or detected at the time a payment was made. Work, which does not conform to the requirements of this Agreement, may be rejected by the District and in that case must be replaced by CONTRACTOR without delay.

- Equipment and Materials:** CONTRACTOR shall provide all equipment, materials, and supplies necessary for the performance of this Agreement *except:* NONE, which shall not exceed a total cost of \$0.00.

5. CONTRACTOR Qualifications / Performance of Services:

CONTRACTOR Qualifications: CONTRACTOR warrants it is specially trained, experienced, competent and fully licensed to provide the Services required by this Agreement in conformity with the laws and regulations of the State of California, the United States of America, and all local laws, ordinances and/or regulations, as they may apply.

Standard of Care: CONTRACTOR warrants that CONTRACTOR has the qualifications and ability to perform the Services in a professional manner, without the advice, control, or supervision of OUSD. CONTRACTOR's services will be performed, findings obtained, reports and recommendations prepared in accordance with generally and currently accepted principles and practices of its profession for services to California school districts.

- Invoicing:** Invoices furnished by CONTRACTOR under this Agreement must be in a form acceptable to OUSD. All amounts paid by OUSD shall be subject to audit by OUSD. Invoices shall include, but not be limited to: Contractor name, Contractor address, invoice date, invoice number, purchase order number, name of school or department service was provided to, period of service, name of the person performing the service, date service was rendered, brief description of services provided, number of hours of service, hourly rate, total payment requested.
- Notices:** All notices and invoices provided for under this Agreement shall be in writing and either personally delivered during normal business hours or sent by U.S. Mail (certified, return receipt requested) with postage prepaid to the other party at the address set forth below:

OUSD Representative:

Name: JOANNA LOCKE
Site /Dept.: 922-FAMILY, SCHOOL AND COMMUNITY PARTNERSHIP
Address: 746 Grand Avenue
Oakland, CA 94610
Phone: 5102731523

CONTRACTOR:

Name: Jeanne McGee
Title: Officer (Executive)
Address: 1924 NW 111th Street
Vancouver, WA 98685
Phone: 360 574-4744

Notice shall be effective when received if personally served or, if mailed, three days after mailing. Either party must give written notice of a change of address.

8. **Status of Contractor:** This is not an employment contract. CONTRACTOR, in the performance of this Agreement, shall be and act as an independent contractor. CONTRACTOR understands and agrees that it and all of its employees shall not be considered officers, employees, agents, partner, or joint venture of OUSD, and are not entitled to benefits of any kind or nature normally provided employees of OUSD and/or to which OUSD's employees are normally entitled, including, but not limited to, State Unemployment Compensation or Worker's Compensation. CONTRACTOR shall assume full responsibility for payment of all Federal, State, and local taxes or contributions, including unemployment insurance, social security and income taxes with respect to CONTRACTOR's employees. In the performance of the work herein contemplated, CONTRACTOR is an independent contractor or business entity, with the sole authority for controlling and directing the performance of the details of the work, OUSD being interested only in the results obtained.

9. **Insurance:**

1. Unless specifically waived by OUSD, the following insurance is required:

i. If CONTRACTOR employs any person to perform work in connection with this Agreement, CONTRACTOR shall procure and maintain at all times during the performance of such work, Workers' Compensation Insurance in conformance with the laws of the State of California and Federal laws when applicable. Employers' Liability Insurance shall not be less than One Million Dollars (\$1,000,000) per accident or disease.

Check one of the boxes below:

CONTRACTOR is aware of the provisions of Section 3700 of the Labor Code which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and will comply with such provisions before commencing the performance of the Work of this Contract.

CONTRACTOR does not employ anyone in the manner subject to the workers' compensation laws of California.

ii. CONTRACTOR shall maintain Commercial General Liability insurance, including automobile coverage with limits of One Million Dollars (\$1,000,000) per occurrence for bodily injury and property damage. The coverage shall be primary as to OUSD and shall name OUSD as an additional insured. Evidence of insurance must be attached. Endorsement of OUSD as an additional insured shall not affect OUSD's rights to any claim, demand, suit or judgment made, brought or recovered against CONTRACTOR. The policy shall protect CONTRACTOR and OUSD in the same manner as though each were separately issued. Nothing in said policy shall operate to increase the Insurer's liability as set forth in the policy beyond the amount or amounts shown or to which the Insurer would have been liable if only one interest were named as an insured.

iii. If CONTRACTOR is offering OUSD professional advice under this Contract, CONTRACTOR shall maintain Errors and Omissions insurance or Professional Liability insurance with coverage limits of One Million Dollars (\$1,000,000) per claim.

OR

iv. CONTRACTOR is not required to maintain any insurance under this agreement. (Completed and approved Waiver of Insurance Form is required.) Waiver of insurance does not release CONTRACTOR from responsibility for any claim or demand.

10. **Licenses and Permits:** CONTRACTOR shall obtain and keep in force all licenses, permits, and certificates necessary for the performance of this Agreement.

11. **Assignment:** The obligations of CONTRACTOR under this Agreement shall not be assigned by CONTRACTOR without the express prior written consent of OUSD.

12. **Non-Discrimination:** It is the policy of OUSD that in connection with all work performed under Contracts there be no discrimination because of race, color, ancestry, national origin, religious creed, physical disability, medical condition, marital status, sexual orientation, gender, or age; therefore, CONTRACTOR agrees to comply with applicable Federal and California laws including, but not limited to, the California Fair Employment and Housing Act beginning with Government Code Section 12900 and Labor Code Section 1735 and OUSD policy. In addition, CONTRACTOR agrees to require like compliance by all its subcontractor(s). CONTRACTOR shall not engage in unlawful discrimination in employment on the basis of actual or perceived; race, color, national origin, ancestry, religion, age, marital status, pregnancy, physical or mental disability, medical condition, veteran status, gender, sex or sexual orientation.

13. **Drug-Free / Smoke Free Policy:** No drugs, alcohol, and/or smoking are allowed at any time in any buildings and/or grounds on OUSD property. No students, staff, visitors, CONTRACTORS, or subcontractors are to use controlled substances, alcohol or tobacco on these sites.
14. **Indemnification:** CONTRACTOR agrees to hold harmless, indemnify, and defend OUSD and its officers, agents, and employees from any and all claims or losses accruing or resulting from injury, damage, or death of any person, firm, or corporation in connection with the performance of this Agreement. CONTRACTOR also agrees to hold harmless, indemnify, and defend OUSD and its elective board, officers, agents, and employees from any and all claims or losses incurred by any supplier, contractor, or subcontractor furnishing work, services, or materials to CONTRACTOR in connection with the performance of this Agreement. This provision survives termination of this Agreement.
15. **Copyright/Trademark/Patent/Ownership:** CONTRACTOR understands and agrees that all matters produced under this Agreement shall become the property of OUSD and cannot be used without OUSD's express written permission. OUSD shall have all right, title and interest in said matters, including the right to secure and maintain the copyright, trademark, and/or patent of said matter in the name of OUSD. CONTRACTOR consents to use of CONTRACTOR's name in conjunction with the sale, use, performance and distribution of the matters, for any purpose and in any medium. These matters include, without limitation, drawings, plans, specifications, studies, reports, memoranda, computation sheets, the contents of computer diskettes, artwork, copy, posters, billboards, photographs, videotapes, audiotapes, systems designs, software, reports, diagrams, surveys, source codes or any other original works of authorship, or other documents prepared by CONTRACTOR or its Sub-CONTRACTORs in connection with the Services performed under this Agreement. All works shall be works for hire as defined under Title 17 of the United States Code, and all copyrights in those works are the property of OUSD.
16. **Waiver:** No delay or omission by either party in exercising any right under this Agreement shall operate as a waiver of that or any other right or prevent a similar subsequent act from constituting a violation of the Agreement.
17. **Termination:** OUSD may at any time terminate this Agreement upon written notice to CONTRACTOR. OUSD shall compensate CONTRACTOR for services satisfactorily provided through the date of termination. In addition, OUSD may terminate this Agreement for cause should CONTRACTOR fail to perform any part of this Agreement. In the event of termination for cause, OUSD may secure the required services from another contractor. If the cost to OUSD exceeds the cost of providing the services pursuant to this Agreement, CONTRACTOR shall pay the additional cost.
18. **Conduct of CONTRACTOR:** CONTRACTOR will adhere to the following staff requirements and provide OUSD with evidence of staff qualifications, which include:
 1. **Tuberculosis Screening:** CONTRACTOR is required to screen employees who will be working at OUSD sites for more than six hours. CONTRACTOR affirms that each employee has current proof of negative TB testing on file and TB results are monitored.
 2. **Fingerprinting of Employees and Agents.** The fingerprinting and criminal background investigation requirements of Education Code section 45125.1 apply to CONTRACTOR's services under this Agreement and CONTRACTOR certifies its compliance with these provisions as follows: "CONTRACTOR certifies that CONTRACTOR has complied with the fingerprinting and criminal background investigation requirements of Education Code section 45125.1 with respect to all CONTRACTOR's employees, subcontractors, agents, and subcontractors' employees or agents ("Employees") regardless of whether those Employees are paid or unpaid, concurrently employed by OUSD, or acting as independent contractors of CONTRACTOR, who may have contact with OUSD pupils in the course of providing services pursuant to the Agreement, and the California Department of Justice has determined that none of those Employees has been convicted of a felony, as that term is defined in Education Code section 45122.1. Contractor further certifies that it has received and reviewed fingerprint results for each of its Employees and Contractor has requested and reviews subsequent arrest records for all Employees who may come into contract with OUSD pupils in providing services to the District under this Agreement.

In the event that OUSD, in its sole discretion, at any time during the term of this contract, desires the removal of any CONTRACTOR related persons, employee, representative or agent from an OUSD school site and, or property, CONTRACTOR shall immediately, upon receiving notice from OUSD of such desire, cause the removal of such person or persons.
19. **No Rights in Third Parties:** This Agreement does not create any rights in, or inure to the benefit of, any third party except as expressly provided herein.
20. **OUSD's Evaluation of CONTRACTOR and CONTRACTOR's Employees and/or Subcontractors.** OUSD may evaluate CONTRACTOR's work in any way that OUSD is entitled to do so pursuant to applicable law. The OUSD's evaluation may include, without limitation:
 1. Requesting that OUSD employee(s) evaluate the CONTRACTOR and the CONTRACTOR's employees and subcontractors and each of their performance.
 2. Announced and unannounced observance of CONTRACTOR, CONTRACTOR's employee(s), and/or subcontractor(s).
21. **Limitation of OUSD Liability:** Other than as provided in this Agreement, OUSD's financial obligations under this Agreement shall be limited to the payment of the compensation provided in this Agreement. Notwithstanding any other provision of this Agreement, in no event, shall OUSD be liable, regardless of whether any claim is based on contract or tort, for any special, consequential, indirect or incidental damages, including, but not limited to, lost profits or revenue, arising out of, or in connection with, this Agreement for the services performed in connection with this Agreement.
22. **Confidentiality:** CONTRACTOR and all CONTRACTOR's agents, personnel, employee(s), and/or subcontractor(s) shall maintain the confidentiality of all information received in the course of performing the Services. CONTRACTOR understands that student records are confidential and agrees to comply with all state and federal laws concerning the maintenance and disclosure of student records. This requirement to maintain confidentiality shall extend beyond the termination of this Agreement. Contractors will be permitted

Professional Services Contract

access to student data only where permissible under state and federal law and only after executing OUSD's Confidentiality Agreement Regarding Student Data.

- 23. Conflict of Interest: CONTRACTOR shall abide by and be subject to all applicable OUSD policies, regulations, statutes or other laws regarding conflict of interest. CONTRACTOR shall not hire any officer or employee of OUSD to perform any service by this Agreement.

CONTRACTOR affirms to the best of his/her/its knowledge, there exists no actual or potential conflict of interest between CONTRACTOR's family, business or financial interest and the services provided under this Agreement, and in the event of change in either private interest or services under this Agreement, any question regarding possible conflict of interest which may arise as a result of such change will be brought to OUSD's attention in writing.

Through its execution of this Agreement, CONTRACTOR acknowledges that it is familiar with the provisions of section 1090 et seq. and section 87100 et seq. of the Government Code of the State of California, and certifies that it does not know of any facts which constitute a violation of said provisions. In the event CONTRACTOR receives any information subsequent to execution of this Agreement which might constitute a violation of said provisions, CONTRACTOR agrees it shall notify OUSD in writing.

- 24. Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion: CONTRACTOR certifies to the best of his/her/its knowledge and belief, that it and its principals: Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency according to Federal Acquisition Regulation Subpart 9.4, and by signing this contract, certifies that this vendor does not appear on the Excluded Parties List. (https://www.epls.gov/eplis/search.do)
- 25. Litigation: This Agreement shall be performed in Oakland, California and is governed by the laws of the State of California. The Alameda County Superior Court shall have jurisdiction over any state court litigation initiated to enforce or interpret this Agreement. If litigation is initiated, the prevailing party shall be entitled to reasonable attorney's fees and costs.
- 26. Incorporation of Recitals and Exhibits: The Recitals and each exhibit attached hereto are hereby incorporated herein by reference.
- 27. Integration/Entire Agreement of Parties: This Agreement constitutes the entire agreement between the Parties and supersedes all prior discussions, negotiations, and agreements, whether oral or written. This Agreement may be amended or modified only by a written instrument executed by both Parties.
- 28. Counterparts: This Agreement and all amendments and supplements to it may be executed in counterparts, and all counterparts together shall be construed as one document.
- 29. Signature Authority: Each party has the full power and authority to enter into and perform this Agreement, and the person signing this Agreement on behalf of each Party has been given the proper authority and empowered to enter into this Agreement.
- 30. Contract Contingent on Governing Board Approval: OUSD shall not be bound by the terms of this Agreement until it has been formally approved by OUSD's Governing Board, and no payment shall be owed or made to CONTRACTOR absent formal approval. This Agreement shall be deemed to be approved when it has been signed by the Board of Education, and/or the Superintendent as its designee.

OAKLAND UNIFIED SCHOOL DISTRICT

MARIA SANTOS 05/27/2014
[] President, Board of Education Date
[X] Superintendent or Designee

Secretary, Board of Education Date

CONTRACTOR

Jeanne McGee 05/27/2014
Contractor eSignature Date

Jeanne McGee, Officer (Executive)
Print Name, Title

EXHIBIT "A" SCOPE OF WORK

[IF A CONTRACTOR PROVIDES AN ACCEPTABLE DESCRIPTION OF SERVICES AS PART OF A PROPOSAL, THAT DESCRIPTION OF SERVICES MAY BE ATTACHED WITHOUT ANY TERMS, CONDITIONS, LIMITATIONS, ETC., FROM THAT PROPOSAL.]

- 1. Description of Services to be Provided:** Provide a description of the service(s) the contractor will provide. Be specific about what service(s) OUSD is purchasing and what *this* Contractor will do.

In support of OUSD's implementation of the strategic plan, the Family, School and Community Partnerships Department is now committed to engaging with families in an inclusive and transparent manner. The consultant will review and/or write documents targeted to families such as the annual Health & Wellness Guide and communication tools around the revised Wellness Policy.

2. Specific Outcomes: What are the expected outcomes from the services of this Contract? Be specific. For example, as a result of the service(s): 1) How many more Oakland children are graduating from high school? 2) How many more Oakland children are attending school 95% or more? 3) How many more students have meaningful internships and/or paying jobs? 4) How many more Oakland children have access to, and use, the health services they need? Provide details of program participation (Students will...) and measurable outcomes (Participants will be able to...). NOT THE GOALS OF THE SITE OR DEPARTMENT.

Improved communication with families around available health services and programs will help increase student and family access to these resources.

3. Alignment with District Strategic Plan: Indicate the goals and visions supported by the services of this contract:
(Check all that apply.)

- | | |
|---|--|
| <input type="checkbox"/> Ensure a high quality instructional core | <input type="checkbox"/> Prepare students for success in college and careers |
| <input checked="" type="checkbox"/> Develop social, emotional and physical health | <input checked="" type="checkbox"/> Safe, healthy and supportive schools |
| <input type="checkbox"/> Create equitable opportunities for learning | <input type="checkbox"/> Accountable for quality |
| <input type="checkbox"/> High quality and effective instruction | <input checked="" type="checkbox"/> Full service community district |

4. Alignment with Community School Strategic Site Plan – CSSSP (required if using State or Federal Funds):

Please select:

Action Item included in Board Approved CSSSP: (no additional documentation required)

– Item Number(s): Not Applicable
No Restricted Funds

Action Item added as modification to Board Approved CSSSP – Submit the following documents to the Resource Manager either electronically via email of scanned documents, fax or drop off.

1. Relevant page of CSSSP with action item highlighted. Page must include header with the word “Modified”, modification date, school site name, both principal and school site council chair initials and date.
2. Meeting announcement for meeting in which the CSSSP modification was approved.
3. Minutes for meeting in which the CSSSP modification was approved indicating approval of the modification.
4. Sign-in sheet for meeting in which the CSSSP modification was approved.

ContractsOnline: Contract Waiver Summary

Site Number-Name: 922-FAMILY, SCHOOL AND COMMUNI

Principal / Department Head: JOANNA LOCKE

Contractor Name: Jeanne McGee

Business Name: Jeanne McGee

Contract Type: Standard

Anticipated Start Date: 05/15/2014

Contract End Date: 06/30/2014

Rate Type: HOURLY

Contract Amount: \$6,000.00

Applicable Waivers

Approved by Risk Management

Insurance-Reduction Waiver Status: WAIVED

Waiver-Reduction Type: WAIVED

Other Reduction Amount:

Approval Date: 05/23/2014

Approved by Deputy Superintendent

Billing Waiver Status: Approved

Approval Date: 05/26/2014

Fingerprint Waiver Status: Approved

Approval Date: 05/26/2014

TB Test Waiver Status: Approved

Approval Date: 05/26/2014

Jeanne McGee, PhD

1924 NW 111th Street
Vancouver, Washington 98685

office: 360 574 - 4744
email: jmcgee360@comcast.net

Expertise and consulting services

Jeanne McGee, PhD, is a sociologist with expertise in health literacy, the measurement and reporting of health care quality, and the development and testing of written material and data displays that are easy for people to understand and use.

Her experience includes academic research and teaching as a faculty member at Duke University, Duke Medical Center, and the University of Oregon, and a leadership position at InterStudy, a health policy organization.

She has written books, journal articles, web-based toolkits, health care performance reports, manuals on best practices, research and evaluation reports, and award-winning health education materials for consumers. She has served on national technical expert panels for the National Quality Forum, Agency for Healthcare Research and Quality, and others.

For 27 years, she has served a broad range of clients in the public and private sectors, including federal and state government, employers and business coalitions, health plans, hospitals, medical groups, foundations, research institutes, and community organizations. Consulting services include:

- Plain language writing, design, and expert review of health-related print and website material.
- Website usability testing and collection of consumer feedback on written material.
- Research and evaluation using methods that include focus groups, in-depth interviews, and the development and implementation of customized surveys for data collection by mail, by phone, or online.
- Presentations, workshops, and training on ways to make information easier for people to understand and use.

Examples of consulting projects

As part of the CAHPS I and CAHPS II consortia of investigators, Jeanne collaborated on development of CAHPS patient experience survey tools, ways to report CAHPS survey results, and provided technical assistance to field demonstrations.

Jeanne has developed and tested a variety of information materials for Medicaid beneficiaries in different states and has developed surveys to collect feedback from Medicaid beneficiaries and healthcare providers.

She has conducted evaluations of the application and enrollment process for Medicaid and State Children's Health Insurance. These studies explored the role and effectiveness of application assisters, barriers that keep people from signing up and renewing, and other issues.

For over 16 years, Jeanne has assisted the Centers for Medicare & Medicaid Services (CMS) in projects to help make information about Medicare and Medicaid easier for beneficiaries to understand and use, with emphasis on making it more suitable for audiences with a broad range of literacy skills. Her work for CMS has included:

- Development of detailed guidelines for CMS on plain language writing, graphic design, and language translation ([cms.gov/writtenmaterialstoolkit](https://www.cms.gov/writtenmaterialstoolkit)).
- Expert review of *Medicare & You* and other CMS publications.
- As subcontractor to L&M Policy Research, consultation to CMS on reorganizing, rewriting, and consumer testing of Medicare documents (e.g., Evidence of Coverage, Summary of Benefits, Annual Notice of Changes, Explanation of Benefits) and websites (e.g., Hospital Compare, Physician Compare, Plan Finder).

In projects for various clients, Jeanne has developed and tested materials to help people become better informed and more actively involved in managing their health by educating them about health care quality and encouraging them to choose evidence-based and cost-effective treatments.

She has conducted evaluations of online, printed, and video versions of decision aids for patients with various medical conditions.

She has developed and tested materials to help consumers understand the basics of electronic medical records, including issues of data privacy and security.

In collaboration with MAXIMUS, Jeanne recently developed the *Checklist for Plain Language* (slideshare.net/PlainTalkConf/jeanne-mcgee-and-the-center-for-health-literacy-quick-checklist-for-plain-language). This new tool provides a succinct list of key elements that make written material easy to understand and use. It is designed for use in assessing materials and is also useful as a quick guide for effective writing and design.

Education, honors, and awards

Ph.D. in Sociology, minor in Economics, Indiana University, Bloomington, Indiana, 1975

- Indiana University Dissertation Fellowship (1972-73)
- Doctoral Qualifying Examinations, Special Commendation (1972)
- National Science Foundation Fellowship (1971-72)
- National Defense Educational Act Title IV Fellowship (1970-71)

M.A. in Sociology, New School for Social Research, New York City, New York, 1969

- Master's Comprehensive Examinations passed *with distinction*

B.A. in Sociology and French, University of California, Santa Barbara, 1967

- B.A. *magna cum laude* (1967)
- University of California *Education Abroad Program*, University of Bordeaux, Bordeaux, France (1964-65)

Professional positions

National health care consulting

- Jeanne McGee, consultation as a sole proprietor, beginning in 2014.
- McGee & Evers Consulting, Inc., *Founder and President*, 1995-2013. Founded in 1995 in Highland Park, Illinois; relocated to Vancouver, Washington, in 1996; dissolved in 2014.
- Independent health research consultant, 1986-1995. In Excelsior, Minnesota, 1986-91; Pennington, New Jersey, 1991-92; Highland Park, Illinois, 1995-96.

Academic and health research and policy positions:

- InterStudy, a national health policy organization in Excelsior, Minnesota. *Senior Vice-President and Director of Operations*, 1984-86.
- University of Oregon, Eugene, Oregon. *Assistant Professor*, Department of Sociology (1978-82). *Faculty Research Award*, University of Oregon (1978). *Finalist, University-Wide Teaching Award* (1981)
- Duke University, Durham, North Carolina. *Assistant Professor*, Department of Sociology (1974-1978). *Faculty Research Award*, Duke University (1976)
- Duke University Medical Center, Durham, North Carolina. *Coordinator*, National Institute for Mental Health *Post-Doctoral Psychiatry-Sociology Research Training Program in Mental Health* (1974-78)

Toolkits, books, and other resources

Resources for health literacy and plain language:

Checklist for Plain Language

- Written in collaboration with MAXIMUS Center for Health Literacy, this Checklist is available at [slideshare.net/PlainTalkConf/jeanne-mcgee-and-the-center-for-health-literacy-quick-checklist-for-plain-language](https://www.slideshare.net/PlainTalkConf/jeanne-mcgee-and-the-center-for-health-literacy-quick-checklist-for-plain-language).

Toolkit for Making Written Material Clear and Effective

- Written for the Centers for Medicare and Medicaid Services (CMS) by Jeanne McGee.
- Available on the CMS website at [cms.gov/writtenmaterialstoolkit](https://www.cms.gov/writtenmaterialstoolkit) (posted in 2010).
- This 11-part Toolkit takes a reader-centered approach to making written material easier for people to understand and use. It has detailed guidelines for writing, graphic design, and culturally-appropriate translation. It includes a new step-by-step guide on using cognitive interviews with readers to improve written materials.

Writing and Designing Print Materials for Beneficiaries: A Guide for State Medicaid Agencies

- Written by Jeanne McGee. Published by the Health Care Financing Administration.

Baltimore, Maryland: HCFA Publication Number 10145, October 1999. *[Now out of print; the toolkit described above is the expanded second edition of this guide.]*

Resources for explaining evidence-based health care to consumers

Communication Toolkit: Using information to get high quality care

- Created in collaboration by the American Institutes for Research (AIR) and McGee & Evers Consulting, Inc. with funding from the California Health Care Foundation. The Toolkit is available from the National Business Group on Health (http://www.businessgrouphealth.org/benefitsttopics/et_communications.cfm).
- This Toolkit provides templates of written material to help employers, labor unions and others deliver messages to employees about the meaning and importance of getting evidence-based health care. The Toolkit gives results from research on ways to communicate more effectively with employees and includes a collection of written materials for Toolkit users to download and adapt.
- Jeanne McGee and Mark Evers, McGee & Evers Consulting, Inc., took the lead on writing and design of the written materials for workers that explain evidence-based health care. They also collaborated on other parts of this project, including design of focus group sessions, development of material on how to communicate more effectively with employees, and development of questionnaire items for a web-based survey of employees conducted by the National Business Group on Health.

Survey resources:

Provider Survey Best Practices: A Resource Manual from the Arizona Health Care Cost Containment System

- Written by Gretchen Engquist, Jeanne McGee, Mitzi Miller, and Nan Jeannero. Published by the Center for Health Care Strategies, Princeton, New Jersey, 2001.
- This manual describes survey methods and lessons learned from two projects that involved using surveys to collect feedback from physicians, office managers, and dentists on their experiences with Medicaid managed care in Arizona.

Collecting Information from Health Care Consumers: A Resource Manual of Tested Questionnaires and Practical Advice.

- Written by Jeanne McGee, Norbert Goldfield, Judy Morton, and Kate Riley. Published by Aspen Publications in 1996, with a supplement issued in 1997.
- This manual reproduces questionnaires that have been used to obtain health-related information from patients or clients, describes how the instruments have been developed and used, and gives examples of how results have been reported.

Award-winning easy-to-read health information

The Oregon Asthma Resource Bank (oregon.gov/DHS/ph/asthma/resourcebank/) is a web-based resource bank of asthma education materials and clinical tools that are clinically accurate and easy to read.

As consultants to the State of Oregon Asthma program, Jeanne McGee and Mark Evers wrote, designed, and tested these Resource Bank materials (titles are listed below under “Selected

articles, reports, and other materials”). In 2005, the Oregon Asthma Resource Bank materials received an award from the National Public Health Information Coalition.

Selected articles, reports, and other materials

Carman, Kristin and Maureen Maurer, Jill Yegian, Pamela Dardess, Jeanne McGee, Mark Evers, Karen Marlo

Evidence that consumers are skeptical about evidence-based health care.
Health Affairs 29:7, July 2010 (web first; pages 1-7).

McGee, Jeanne

Tips on Writing a Quality Report and Tips on Designing a Quality Report. In the Resources section of talkingquality.ahrq.gov/, the Agency for Healthcare Research and Quality’s website that offers guidance for sponsors of consumer reports on health care quality.

McGee, Jeanne and Mark Evers

Consumer materials written for the Oregon Health Care Quality Corporation, 2009-2012. These materials have been distributed in printed formats and are available on the website at partnerforqualitycare.org.

- Quality health care: what is it and how can you get it?
- How can you find trustworthy health information on the web?
- Making the most of your medical appointments
- What is “care that works”?
- Safe and effective care for low back pain

McGee, Jeanne and Mark Evers

Consumer materials on four topics written for the *Communication Toolkit: Using information to get high quality care* in collaboration with the American Institutes for Research, 2008. Available at businessgrouphealth.org/benefitsttopics/et_communications.cfm.

- Understanding the basics of health care quality and the importance of evidence-based information
- Cost and quality — how to choose quality and make wise use of money spent on health care
- Tips for getting good quality care before, during, and after a health care appointment
- Using the internet to find health information you can trust

McGee, Jeanne and Mark Evers

Final Report, Consumer Engagement Project, Oregon Health Information Security and Privacy Collaborative (at oregon.gov/OHPPR/HISPC/Docs/OR_20HICConsumerEngagementProjectFinalReportSPC_20consumer_20project_20rpt_202007.pdf).

This report summarizes findings from a study of consumers’ reaction to electronic health information exchange. The study developed and tested consumer education tools and explored people’s views about data privacy, security, access, and control. October 2007.

McGee, Jeanne and Mark Evers

Diabetes patient education materials written for the state of Oregon:

- Staying healthy with diabetes
- Blood glucose and Type 1 diabetes

- Blood glucose and Type 2 diabetes
- Keeping your eyes healthy when you have diabetes
- Blood glucose and the A-1-C blood test
- 10 tests and exams everyone with diabetes should be getting
- 4 action steps for quality care

These materials are available at oregon.gov/DHS/ph/diabetes/resourcebank/. 2006-2008.

McGee, Jeanne and Mark Evers

Asthma patient education materials written for the state of Oregon:

- Questions and Answers about inhaled corticosteroids for asthma
- What to do if you get asthma symptoms when you exercise
- Taking your "daily control" medicine for asthma
- What to do about a cold or the flu when you have asthma
- Asthma and secondhand smoke
- Smoking and asthma
- Pets and asthma
- What is asthma and what can you do about it?
- Why do you need two different types of asthma medicine?
- What to do when you have an asthma attack
- What things cause asthma attacks for you?
- Warning signs of possible problems with asthma
- Tips for school staff about physical activity of students with asthma
- When a student has an asthma attack (emergency poster)

These materials are available at oregon.gov/DHS/ph/asthma/resourcebank/. 2003-2006.

McGee, Jeanne, David Kanouse, Shoshanna Sofaer, J. Lee Hargraves, Elizabeth Hoy, and Susan Kleimann

Making Survey Results Easy to Report to Consumers: How Reporting Needs Guided Survey Design in CAHPS. *Medical Care*, Volume 37, Number 3 Supplement, pages MS32-MS40, March 1999.

McGee, Jeanne

Communicating Comparisons on Quality to Consumers: What Works and Why. Pages 95-108 in Curtis, Rick, Tricia Kurtz, and Larry Stepnik (Editors), *Creating Consumer Choice in Health Care: Measuring and Communicating Health Plan Performance Information*. Chicago, Illinois: Health Administration Press, 1998.

Knutson, David, Jinnet Fowles, Michael Finch, Jeanne McGee, Nanette Dahms, Elizabeth Kind, and Susan Adlis.

Employer-Specific Versus Community-Wide Report Cards: Is There a Difference? *Health Care Financing Review*, Volume 18, Number 1, pages 111-125, Fall 1996.

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Findings from Focus Groups Conducted for the National Committee for Quality Assurance (NCQA) Medicare and Medicaid Consumer Information Projects. Washington, DC: NCQA. July, 1996.

McGee, Jeanne

Information Interests, Needs, and Concerns of Medicaid Beneficiaries: Final Report, Part 1 of the NCQA Medicaid Consumer Information Project. Washington, DC: NCQA, May, 1996.

Morton, Judy, and Jeanne McGee.

Tips for Creating a Customer Listening System. *Aspen's Advisor for Nurse Executives*, Volume 11, Number 8, May 1996.

McGee, Jeanne.

Field Testing to Improve Information Materials for Consumers: A Do-It-Yourself Guide. Paper presented at "Harnessing the Power of Consumer Choice," the Third Annual Conference of the Academy of Health Plan Purchasing Cooperatives, Seattle, Washington, July 1995. Reprinted by the National Health Law Program in a manual of best practices.

McGee, Jeanne.

Surveys of Medicaid Enrollees. Appendix IV of *Medicaid HEDIS: An Adaptation of the Health Plan Employer Data and Information Set 2.0/2.5*, pages 277-328, Washington, D.C.: National Committee for Quality Assurance, 1995.

McGee, Jeanne, and David Knutson.

Health Care Report Cards: What About Consumers' Perspectives? In *The Journal of Ambulatory Care Management*, Volume 17, Number 4, October 1994, pages 1-14.

McGee, Jeanne

Survey instruments and project descriptions in annual supplements of N. Goldfield, M. Pine, and J. Pine, Eds, *Measuring and Managing Health Care Quality: Procedures, Techniques, and Protocols*. Gaithersburg, MD: Aspen Publications:

- Consumer Satisfaction with Mental Health Care (17 Questions), III, 1994.
- With NCQA: NCQA Michigan Project Consumer Satisfaction Survey, II, 1993.
- With Patricia Drury: Results from the Minnesota Coalition on Health Survey: State Employee Evaluations of Health Benefit Plans, I, 1992.

McGee, Jeanne.

Purchasers' Guide to Managed Health Care. Saint Paul, Minnesota: Minnesota Coalition on Health, 1988.

Research methods expertise and experience

College courses on research methods

- Jeanne has taught graduate and undergraduate courses in qualitative and quantitative research methods at Duke University and the University of Oregon. She coordinated a post-graduate research training program at Duke Medical Center.

Cognitive interviewing and usability testing

- Jeanne has written a book-length guide to methods for testing written material with readers. This guide is Part 6 of the *Toolkit for Making Written Material Clear and Effective* that she wrote for the Centers for Medicare & Medicaid Services. Designed for people without a research background, this methods guide covers the techniques used in cognitive interviewing and usability testing.

- Jeanne has extensive experience in designing and conducting cognitive interviews and usability testing of questionnaires and information materials for a wide variety of audiences including Medicare and Medicaid beneficiaries and providers such as physicians and nurses.
- She has done numerous presentations and workshops on how to use these methods to improve survey questions and written materials.

Focus groups

- Jeanne has designed, moderated, and reported the results from many focus groups with different types of participants, including consumers, Medicaid and Medicare beneficiaries, patients, physicians, nurses, dentists, medical and dental office staff, community leaders, state agency staff, retail sales staff, and customer service representatives.
- For AcademyHealth, Jeanne taught a six-hour methods seminar, *Using Focus Groups in Your Research: Basic Techniques, Challenging Issues, Practical Tips*.

Key informant interviews

- Jeanne has designed and conducted many key informant interviews. She has taught workshops on interviewing techniques and provided intensive training on these techniques for clients.

Surveys

- In her research projects and work for clients, Jeanne has designed and conducted many surveys. Her experience includes surveys conducted by mail, telephone, and on-line through a website.
- In research and work for clients, Jeanne has developed and tested numerous questionnaires. Some of these have been adaptations of existing survey instruments, but many have been created as custom questionnaires to fill a specific need.
- Her publications on survey methods include
 - *Collecting Information from Health Care Consumers: A Manual of Tested Questionnaires and Practical Advice*
 - *Provider Survey Best Practices: A Resource Manual from the Arizona Health Care Cost Containment System*
 - An appendix on consumer surveys for Medicaid HEDIS.