

Board Office Use: Legislative File Info.	
File ID Number:	17-0332
Introduction Date:	03/22/2017
Enactment Number:	
Enactment Date:	

Memo

To: Board of Education

From: Devin Dillon, Interim Superintendent

Board Meeting Date: 03/22/2017

Subject: Professional Service Contract

Contractor: STETSON & ASSOCIATES of Houston, TX

Services for: 975-SPECIAL EDUCATION

Board Action Requested and Recommendation: Approval by the Board of Education of a Professional Services Contract between the District and STETSON & ASSOCIATES, Houston, TX, for the latter to provide: Stetson provides technical assistance through a school by school approach. The training is first offered to school site leaders and then extended to a school based team. The focus is on implementing inclusive practices and offering the least restrictive environment to our students. Stetson entitles their school based approach to inclusive practices as "Step by Step to Inclusion". The approach is meant to evaluate every Individualized Education Program (IEP) to make instructional decisions. This planning is completed in conjunction with the general education teacher so that each student participating is supported to be successful in an inclusive setting. School based teams build a foundation for understanding why

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

Stetson possess a knowledge base of improving special education services that our OUSD staff are acquiring through training and technical assistance. OUSD staff are not yet experts in inclusive practices although we are working on our knowledge base of implementing quality special education models.

Discussion:
(QUANTIFY what is being purchased.)

Stetson provides technical assistance through a school by school approach. The training is first offered to school site leaders and then extended to a school based team. The focus is on implementing inclusive practices and offering the least restrictive environment to our students. Stetson entitles their school based approach to inclusive practices as "Step by Step to Inclusion". The approach is meant to evaluate every Individualized Education Program (IEP) to make instructional decisions. This planning is completed in conjunction with the general education teacher so that each student participating is supported to be successful in an inclusive setting. School based teams build a foundation for understanding why inclusive practices and the language describing inclusive practices. The school based team is taken through three design steps, planning for the general education curriculum, the supports the student will need to participate in a general education setting, and is locating a student within the general education classroom the best setting for a particular student. Once school sites participate in the Step by Step training, they also will receive technical assistance at their school site. Stetson consultants, accompanied by an OUSD Special Education staff person go to the school sites to support and review each school sites' implementation plan and progress to date. The OUSD Special Education staff person accompanies the Stetson consultant so that OUSD staff build their knowledge of best practices and how to support school sites working towards more inclusive practices and settings.

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Fiscal Impact: Funding Resource name(s) (detailed below) not to exceed \$154,100.00.

\$154,100.00

TITLE 2-A TEACHER QUALITY

Attachments: Professional Services Contract including Scope of Work



CONTRACT JUSTIFICATION FORM

This Form Shall Be Submitted to the Board Office
With *Every* Consent Agenda Contract.

Legislative File ID No. 17-0332

Department: 975-SPECIAL EDUCATION

Vendor Name: STETSON & ASSOCIATES

Contract Term: Start Date: 07/01/2016 End Date: 06/30/2017

Annual Cost: \$ \$154,100.00

Approved by: JAMES HARRIS

Is Vendor a local Oakland business? Yes ☐ No ☒

Why was this Vendor selected?

Worked with Vendor previously at OUSD

Summarize the services this Vendor will be providing.

Was this contract competitively bid? Yes ☒ No ☐

If No, answer the following:

1) How did you determine the price is competitive?

Price compared with other vendors

2) Please check the competitive bid exception relied upon:

☐

Educational Materials

☐

Special Services contracts for financial, economic, accounting, legal or administrative services

☐

CUPCCAA exception (Uniform Public Construction Cost Accounting Act)

☐

Professional Service Agreements of less than \$88,300.00 (increases a small amount on January 1 of each year)

☐

Construction related Professional Services such as Architects, DSA Inspectors, Environmental Consultants and Construction Managers (require a "fair, competitive selection process)

☐

Energy conservation and alternative energy supply (e.g., solar, energy conservation, co-generation and alternate energy supply sources)

☐

Emergency contracts [requires Board resolution declaring an emergency]

☐

Technology contracts

☐

electronic data-processing systems, supporting software and/or services (including copiers/printers) over the \$88,300.00 bid limit, must be competitively advertised, but any one of the three lowest responsible bidders may be selected

☐

contracts for computers, software, telecommunications equipment, microwave equipment, and other related electronic equipment and apparatus, including E-Rate solicitations, may be procured through an RFP process instead of a competitive, lowest price bid process

☐

Western States Contracting Alliance Contracts (WSCA)

☐

California Multiple Award Schedule Contracts (CMAS) [contracts are often used for the purchase of information technology and software]

☐

"Piggyback" Contracts with other governmental entities

☐

Perishable Food

☐

Sole Source

☐

Change Order for Material and Supplies if the cost agreed upon in writing does not exceed ten percent of the original contract price

☐

Other, please provide specific exception

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OAKLAND UNIFIED
SCHOOL DISTRICT

PROFESSIONAL SERVICES CONTRACT 2016-2017

This Agreement is entered into between STETSON & ASSOCIATES of Houston, TX
(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 07/01/2016, or the day immediately following approval by the Superintendent if the aggregate amount CONTRACTOR has contracted with the District is below \$88,300.00 in the current fiscal year; or, approval by the Board of Education if the total contract(s) exceed \$88,300.00, whichever is later. The work shall be completed no later than 06/30/2017.
- Compensation:** OUSD agrees to pay CONTRACTOR for services satisfactorily rendered pursuant to this Agreement. The compensation under this Contract shall not exceed One Hundred Fifty-Four Thousand One Hundred Dollars and 00/100 Dollars (\$154,100.00) [per fiscal year], at an hourly billing rate not to exceed N/A 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: N/A.

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: N/A, 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: SONDRA AGUILERASite /Dept.: 975-SPECIAL EDUCATIONAddress: 1000 BROADWAY, STE. 398Oakland, CA 94607Phone: (510) 879-8528Email: sondra.aguilera@ousd.org**CONTRACTOR:**Name: Frances StetsonTitle: OwnerAddress: 14343 Torrey Chase Blvd, Ste GHouston, TX 77014Phone: 281-440-4220Email: pwilliams@stetsonassociates.com

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 from OUSD's Risk Management.) 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 30 days prior 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:** By signing this Agreement, CONTRACTOR certifies compliance with the following requirements and will 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

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, 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 without the prior approval of OUSD Human Resources.

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.sam.gov/>).
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.
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.
31. **W-9 Form:** If CONTRACTOR is doing business with OUSD for the first time, complete and return with the signed Contract the W-9 form.

OAKLAND UNIFIED SCHOOL DISTRICT

☒ President, Board of Education

☐ Superintendent or Designee

Secretary, Board of Education

CONTRACTOR

Frances Stetson

Contractor Signature

Frances Stetson, Owner

Print Name, Title

Form approved by OUSD General Counsel for 2015-16 FY

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.

See Attached Scope of Work

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.

As a result of these contracted services, our students with disabilities will experience a more inclusive school setting because the adults serving our students will be more knowledgeable about how to implement inclusive practices and be supported to implement inclusive practices. The intent is to provide training to all OUSD schools so that our entire school district is better equipped to support our students with disabilities. We aim to provide students the least restrictive environment because of the known benefits of participating in this environment.

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

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

Central - No CSSSP

- ☐ **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.

SUPPORT FOR OAKLAND UNIFIED SCHOOL DISTRICT

Framing the Process – Fine-tuning for Success

Understanding Step by Step to Inclusion	Understanding Oakland Unified School District's History with Step by Step
<ol style="list-style-type: none"> 1. Step by Step is a process designed to implement best practices in inclusion for ALL students with disabilities within the district. 2. Step by Step is designed to build a foundation for understanding the why of inclusion as well as the vocabulary of inclusion. This allows a campus to have conversations regarding services for students needing support without relying on existing practices for specific disabilities. 3. Step by Step does not create a model of inclusion but rather makes individual decisions for each student based upon their ability to interact with the general curriculum and classroom. It is a set of decisions. <ol style="list-style-type: none"> a. Decision 1 relates to the general classroom and curriculum. Can the student participate as instruction is designed for all students? If not, then accommodations and modifications are identified? b. Decision 2 relates to the personal supports needed by the student within general education. These include peers, support from a paraeducator (support facilitation) or a coteacher (certified educator). c. Decision 3 considers location. Can the student, with the appropriate supports, receive instruction within general education or is something different needed by the student which cannot be provided within general education. This is specialized support and may be called resource, mild to moderate self-contained or moderate to severe self-contained. 4. Step by Step is three days of training delivered to a campus team which includes the administrator, several special educators and several general educators. This group creates a plan for how they will work with their campus to ensure that all staff have the needed knowledge to implement quality inclusive services. 5. We recommend a day of technical assistance be provided to each participating campus by a Stetson Associate. Typically, a campus will ask that the day involve actually working with the schedule of special education supports. 	<p>Two rounds of Step by Step were delivered during the month of May, 2016. There were numerous issues with this round of training.</p> <ul style="list-style-type: none"> • <i>Issue:</i> Campus administrators did not receive needed support to understand how to build a team to attend the training. Some campuses sent special education teachers only. Some campuses sent teachers without a campus administrator. It was very difficult for teachers lacking guidance of their principal to build a plan for their campus. • <i>Issue:</i> The first two days of Step by Step were provided in May. The third day was to have been delivered in June, however, campuses did not receive support in understanding the need for the entire team to return for the third day. Day 3 of training was never held. • <i>Issue:</i> Ten schools from the first two rounds of training scheduled a follow-up day of technical assistance. Oakland has received copies of all of those TA reports. All schools indicated satisfaction with the process and appreciation for the onsite work. Of the schools receiving TA visits only one resulted in a recommendation for additional staff based upon Step by Step. However, since a number of principals did not go through the full training, it is possible that misunderstandings did exist which led to some principals requesting additional staff.



Step by Step Training Requirements

A Request by Stetson & Associates, Inc. re: Step by Step Set Up

We believe that Stetson & Associates, Inc. enjoys an excellent reputation throughout hundreds of school districts for staff development services. This success can be attributed to the high standards of our clients and to our own requirements for optimum training sessions. To maintain the expected level of excellence, training criteria have recently been established. The following provides a review of the conditions under which Stetson & Associates, Inc. is confident that ***Step by Step for Inclusive Schools*** training will be most effective.

If a client wishes or needs to deviate from these conditions, changes should be discussed with your primary contact at Stetson & Associates, Inc. or with Dr. Frances Stetson, President. **The purpose of this communication is to ensure your expectations for quality and effectiveness are met and our standards for success are met as well.** Please review the following guidelines for *Step by Step* training.

Participants and Teams

1. Participants must attend as team members selected by the school principal and should meet the flexible guidelines provided below.
2. The school principal, who is also a required member of the team, must head each school team. We understand the time constraints of school principals but their attendance is necessary for effective adoption of practices requiring administrative involvement and approval for implementation.
3. If a second or third team is to train from the school, the principal, assistant principal or other designee must lead it. If this is absolutely not possible for repeat teams, we request that the principal attend at least the afternoon of Day 2 when a campus action plan is developed. In this case, the principal should notify the new team members that while he or she will not be attending all of the sessions, prior participation in the training and full support of the training content allows the principal to attend only a small segment of the training.
4. Team members should understand that they are to attend all three *Step by Step* training days. **Do not send different team members to each of the training days.** Each day's subject matter builds on the previous days. Content from all three days provides the skill foundation necessary to successfully profit from the training series.

5. Teams should be no more than four to six members, unless previously approved by S&A. Very large teams find collaboration at the training sessions to be difficult.
6. No more than eight (8) teams should be trained at a time (so that trainers may move from team to team to provide highly individualized consultation throughout the training).
7. There should be a total audience size of approximately 48 participants. As many as 60 participants is acceptable providing the number of teams does not exceed eight.
8. The remaining number of participants should be personnel in leadership or supervisory positions from the central office and/or area office levels. This provides the mechanism to ensure that all school personnel use and understand vocabulary regarding inclusive education; supply technical assistance support and other services; and solidifies a partnership between the district support staff and their schools relative to the desired goals.

Training Room

1. Each team should have its own table. When more than one team shares a table, it is frustrating for both teams and less is accomplished.
2. The training center should be of sufficient size to allow movement around the room, and area for a gallery walk around the walls for participants to pass through when completing the activity.
3. Equipment/materials needs are always the same for the *Step by Step* sessions. They are as follows:
 - a. Name tags
 - b. Table tents for the name of the school or team
 - c. LCD projector
 - d. A large screen or a light colored wall for projection
 - e. Flip chart paper, preferably with self-stick adhesive
 - f. Tape
 - g. 15 markers in assorted colors
 - h. Post-it notes
4. Stetson associates bring their own computers to attach to your LCD projector and any specialized materials needed.
5. Please have at least one wireless microphone for each session.
6. Ideal times for each session are: 8:30AM until 3:30PM with one hour for lunch. If a longer lunch period is expected or required to accommodate the group, we will provide the timeframe for lunch you suggest.

We appreciate your loyalty to our firm, and we strive to provide our clients with the best services possible. If you have any questions or concerns about the requirements stated above, please don't hesitate to call our office at 281-440-4220.