



AGENDA REQUEST FORM

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA

ITEM No.:

EE-29.

MEETING DATE

2020-05-19 10:05 - Regular School Board Meeting

AGENDA ITEM

ITEMS

CATEGORY

EE. OFFICE OF STRATEGY & OPERATIONS

DEPARTMENT

Procurement & Warehousing Services

Special Order Request
 Yes No

Time

Open Agenda
 Yes No

TITLE:

Recommendation to Approve Agreement - FY21-047 - Montessori Education Certification for Teachers

REQUESTED ACTION:

Approve the recommendation to award the above Agreement FY21-047 for Montessori education training at Beachside Montessori Village; King, Dr. Martin Luther, Montessori Academy; Virginia Shuman Young Montessori. Contract Term: July 1, 2020 through June 30, 2023, Three (3) Years; User Department: Innovative Programs/Design Support; Award Amount: \$24,400; Awarded Vendor(s): Summit Montessori Teacher Training Institute, LLC; Small/Minority/Women Business Enterprise Vendor(s): None.

SUMMARY EXPLANATION AND BACKGROUND:

Participating teachers from Beachside Montessori Village, King, Dr. Martin Luther, Montessori Academy, and Virginia Shuman Young Montessori will receive rigorous Montessori training to be credentialed in Early Childhood and Elementary I Montessori education. Training includes Montessori philosophy, materials, and child development theory. The teachers participate in academic instruction and practice laboratories under the supervision of instructors from Summit Montessori. Summit Montessori has been certified as a Montessori training institute by the Montessori Accreditation Council for Teacher Education and is an affiliate of the American Montessori Society.

This Agreement has been reviewed and approved as to form and legal content by the Office of the General Counsel.

SCHOOL BOARD GOALS:

Goal 1: High Quality Instruction Goal 2: Safe & Supportive Environment Goal 3: Effective Communication

FINANCIAL IMPACT:

Due to the COVID-19, the spending authority requested of \$24,400 covers the estimated amount projected for the first twelve (12) months; therefore, additional spending authority, to cover the remaining term of the Agreement will be requested in a future date. The funding source will come from the school's Magnet budget. The financial impact amount represents an estimated contract value; however, the amount authorized will not exceed the estimated contract award amount.

EXHIBITS: (List)

(1) Executive Summary (2) Financial Analysis Worksheet (3) Agreement

BOARD ACTION:

APPROVED

(For Official School Board Records Office Only)

SOURCE OF ADDITIONAL INFORMATION:

Name: Shernette Grant

Phone: 754-321-2071

Name: Mary C. Coker

Phone: 754-321-0501

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA
 Senior Leader & Title

Maurice L. Woods - Chief Strategy & Operations Officer

Signature

Maurice Woods

5/11/2020, 9:14:04 AM

Approved In Open Board Meeting On:

MAY 19 2020

By:

[Signature]
 School Board Chair

Electronic Signature

Form #4189 Revised 07/25/2019

RWR/ MLW/MCC/SG:mt

EXECUTIVE SUMMARY

Recommendation to Approve Agreement FY21-047 – Montessori Education Certification for Teachers

Introduction

Responsible: Procurement & Warehousing Services (PWS)

This request is to approve the recommendation to award the Agreement FY21-047 – Montessori Education Certification for Teachers to Summit Montessori Teacher Training Institute, LLC (SM). The School Board of Broward County, Florida (SBBC), is willing to continue its partnership with SM for teachers to be trained and credentialed in Montessori Education with the American Montessori Society. The term of this Agreement will be from July 1, 2020 through June 30, 2023.

FY21-047 will replace bid ID FY20-076, which was approved in the May 21, 2019 School Board meeting for one (1) year from July 1, 2019 through June 30, 2020, with a spending authority of \$60,600.

Due to the COVID-19, the spending authority being requested is \$24,400, and covers the estimated amount projected for the first twelve (12) months; therefore, additional spending authority to cover the remaining term of the Agreement will be requested in a future date.

Goods/Services Description

Responsible: Innovative Programs

Summit Montessori Teacher Training Institute prepares teachers for working in age three through six (3-6) classrooms (Early Childhood), as well as the age of six through nine (6-9) classrooms (Elementary I). Upon completion of all program requirements, the teacher will receive an American Montessori Society certificate. Summit Montessori offers practical application skills in Montessori education. The program includes hands-on experiences with credentialed trainers and provides opportunities for the teachers to interact with the Montessori materials through classroom experiences.

The Summit agreement is for three (3) identified schools, including Beachside Montessori Village, King, Dr. Martin Luther, Montessori Academy, and Virginia Shuman Young Montessori Schools.

Beginning in the 2017-2018 school year, BTU Agreement language was amended to include a commitment clause for teachers assigned to teach Montessori core courses at a Montessori school (Article 4 F- Special Teaching Assignments). As of School Year 2018, four (4) Broward County Public Schools teachers have enrolled in the Summit Montessori credentialing courses. Of the group, one (1) has completed the program, and one (1) is on schedule to graduate in June 2020. Based on the timeframe for completion, the remaining two (2) teachers have until May 2021 to complete. One hundred (100) percent of these teachers are still employed at their current locations. Additionally, the tables below provide information relative to school-specific Montessori data.

To provide schools guidance around the spending of Montessori allocations for teacher training, information has been added to the 2020-2021 Magnet Budget Guidelines to provide schools guidance on the expectation that monies assigned for teacher training are to be used for that purpose only.

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The benefits for Broward teachers to attend Summit Montessori training are that the classes are held on Summit-Questa Montessori campus in Davie, Florida, during the summer and on weekends throughout the year. The program essentially consists of a full-time summer component that spans June and July of each year, followed by a series of eight through nine (8-9) weekend sessions held once monthly. This is further supplemented by ongoing support services for enrolled teachers. Summit is an American Montessori

Society Affiliate and its courses are accredited by the Montessori Accreditation Council for Teacher Education. The American Montessori Society allows adult learners three (3) years to complete the course work and practicum phase of the training. The Summit schedule, therefore, offers teachers one to three (1-3) years to complete the entire program. Under the terms of this Agreement, teachers may only enroll during the School Year 2020-2021 to allow for completion of the program by School Year 2022-2023. Teachers who enroll during the June 2020 session will, therefore, have until June 2023 to complete. A new agreement will be established in June 2021 for new enrollments.

Table 1 below represents teacher survey data collected from schools as of March 2020.

Table 1: School Year 2020 School Montessori Survey Data

School Name	# of Teachers: Whole School	# of Teachers: Montessori Program	# of Teachers Fully Montessori Credentialed	# of Teachers Currently in Training	# of Teachers that have not begun training
Beachside Montessori Village	55	39	15	21	3
Virginia Shuman Young Montessori	44	37	28	8	1
Bair Middle	42	12	2	3	7
King, Dr. Martin Luther, Montessori Academy	30	22	5	5	12
Sunrise Middle	66	28	1	1	27
				38	50

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Procurement Method
Responsible: PWS

Pursuant to Purchasing Policy 3320 and the Department of Education, Rule 6A-1.012, 11(a), Florida Administrative Code as authorized by Section 1010.04(4)(a), Florida Statutes, and Purchasing Policy 3320, Section II, G, the requirement for requesting competitive solicitation for commodities or contractual services from three (3) or more sources is hereby waived for the purchase of professional services.

Financial Impact
Responsible: PWS and Innovative Programs

Due to the COVID-19, the spending authority being requested is \$24,400, and covers the estimated amount projected for the first twelve (12) months; therefore, additional spending authority to cover the remaining term of the Agreement will be requested in a future date.

In determining the spending authority for this Agreement, consideration for current conditions, the needs, as indicated by the schools, as well as historical spending data as referenced in table 2 below, was used. With consideration for these factors, as such, the term of the agreement was revised to one (1) year with consideration for the factors previously referenced.

Table 2 below represents estimated costs as submitted by the Montessori schools relative to their Summit Montessori training plan for School Year 2021

	King, Dr. Martin Luther	Virginia Shuman Young	Beachside
PROPOSED TOTAL # of Teacher Impacted	1	2	1
Anticipated summit cost @ a maximum of \$6100/teacher	\$6,100	\$12,200	\$6,100
TOTAL	\$24,400		

This Agreement was originally brought to the April 21, 2020, Regular School Board Meeting (RSBM). With instructions from the School Board, the item was deferred to the May 19, 2020 RSBM with guidance for surveying school staff as a means for determining the requested spending authority. As such, and in light of the current conditions, data collected was used to determine the requested Montessori spending authority, and the term of the agreement revised to one (1) year. Table 3 below represents survey data to that effect for the revised one (1) year term of this contract.

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Table 3 below represents estimated costs as submitted by Montessori schools relative to their Summit Montessori training plan for School Year 2021

	King, Dr. Martin Luther	Virginia Shuman Young	Beachside
PROPOSED TOTAL # of Teacher Impacted	1	2	1
Identified Need & Budgeted Cost @ a maximum of \$6100/teacher	\$6,100	\$12,200	\$6,100
TOTAL			
\$24,400			

Please see below breakdown for entire bid term:

<u>Estimated spending authority for twelve (12) months</u>	<u>\$24,400</u>
<u>Term of the agreement (years)</u>	<u>x 3</u>
<u>Estimated total spending authority until expiration</u>	<u>\$73,200</u>

The funding source is allocated through the 2020-2021 Magnet Schools Budget. The funds for this Agreement will be paid from each participating schools' budgets through allocations received from the District's Innovative Programs Department's Magnet funds allocation process and guidelines.

The financial impact amount represents an estimated contract value; however, expenditures for this contract should not exceed \$24,400.

AGREEMENT

THIS AGREEMENT is made and entered into as of this 19th day of May, 2020, by and between

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA
(hereinafter referred to as "SBBC"),
a body corporate and political subdivision of the State of Florida,
whose principal place of business is
600 Southeast Third Avenue, Fort Lauderdale, Florida 33301

and

SUMMIT MONTESSORI TEACHER TRAINING INSTITUTE, L.L.C.
(hereinafter referred to as "SM"),
whose principal place of business is
5451 Southwest 64th Avenue, Davie, Florida 33314

WHEREAS, SM has made a commitment to supporting Montessori education; and

WHEREAS, SM has a relationship and meets qualification standards with the American Montessori Society to train and credential Elementary Montessori teachers specifically in the area of Early Childhood level learning and Elementary I level learning; and

WHEREAS, through this Agreement, SBBC will work with SM to provide Beachside Montessori Village, Dr. Martin Luther King, Jr. Montessori Academy, and Virginia Shuman Young Elementary with the opportunity to train and credential teachers in the Montessori Method.

NOW, THEREFORE, in consideration of the premises and of the mutual covenants contained herein and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the Parties hereby agree as follows:

ARTICLE 1 - RECITALS

1.01 **Recitals.** The parties agree that the foregoing recitals are true and correct and that such recitals are incorporated herein by reference.

ARTICLE 2 – SPECIAL CONDITIONS

2.01 **Term of Agreement.** Unless terminated earlier pursuant to Section 3.05 of this Agreement, the term of this Agreement shall commence on July 1, 2020, and conclude on June 30, 2023.

2.02 **SBBC Responsibilities.** SBBC shall permit SM to monitor teacher progress through classroom observation on Montessori methodologies in Early Childhood and Elementary I classrooms at Beachside Montessori Village, Dr. Martin Luther King, Jr. Montessori Academy and Virginia Shuman Young Elementary. SBBC teachers will enroll for the summer component of the Early Childhood course and Elementary I course, no later than June of 2021 and must complete by June 2023.

2.03 **SM Responsibilities.** SM shall provide SBBC with a comprehensive professional development educational program (inclusive of, but not limited to, instruction, materials, supervised practice labs and examination) in Montessori education for Beachside Montessori Village, Dr. Martin Luther King, Jr. Montessori Academy and Virginia Shuman Young Elementary teachers which allows up to four (4) SBBC teachers to take either the Early Childhood courses (covering ages 3-6) or the Elementary I courses (covering ages 6-9) during the term of this Agreement, which will result in Montessori credential qualification for the respective teacher. Additionally, SM shall provide SBBC teachers with an American Montessori Society credential, upon successful completion of all program requirements.

2.04 **SBBC Disclosure of Education Records.** Although no student education records shall be disclosed pursuant to this Agreement, should SM come into contact with education records during the course of contracted responsibilities, these records are confidential and protected by the Family Educational Rights and Privacy Act (FERPA) and state laws and may not be used or re-disclosed. Any use or re-disclosure may violate applicable federal and state laws. However, SM will visit SBBC classrooms and observe teachers instructing students. SM may not re-disclose any student information that they observe, except to complete the responsibilities listed in this agreement, or as permitted or required by law.

2.05 **SM Confidentiality of Educational Records.** Notwithstanding any provision to the contrary within this Agreement, SM shall:

(a) fully comply with the requirements of Sections 1002.22, 1002.221, and 1002.222, Florida Statutes; the Family Educational Rights and Privacy Act, 20 U.S.C § 1232g (FERPA) and its implementing regulations (34 C.F.R. Part 99), and any other state or federal law or regulation regarding the confidentiality of student information and records;

(b) hold any education records in strict confidence and not use or redisclose same except as required by this Agreement or as required or permitted by law unless the parent of each student or a student age 18 or older whose education records are to be shared provides prior written consent for their release;

(c) ensure that, at all times, all of its employees who have access to any education records during the term of their employment shall abide strictly by its obligations under this Agreement, and that access to education records is limited only to its employees that require the information to carry out the responsibilities under this Agreement and shall provide said list of employees to SBBC upon request;

(d) safeguard each education record through administrative, physical and technological standards to ensure that adequate controls are in place to protect the education records and information in accordance with FERPA's privacy requirements; and

(e) utilize the education records solely for the purposes of providing products and services as contemplated under this Agreement; and shall not share, publish, sell, distribute, target advertise, or display education records to any third party.

2.06 SBBC Disclosure of Employee Records.

(a) SBBC teachers complete their own application to receive SM training and a subsequent Montessori credential. SBBC teachers will provide their application directly to SM.

(b) SBBC will not disclose any additional employee records to SM without the prior written consent of the employee being trained, except as permitted or required by law.

2.07 SM Safeguarding Confidential Employee Records. Notwithstanding any provision to the contrary within this Agreement, SM shall:

(a) fully comply with the requirements of state or federal law or regulation regarding the confidentiality of employee records;

(b) hold the employee records in strict confidence and not use or disclose same except as required by this Agreement or as required or permitted by law;

(c) only share employee records with those who have a need to access the information in order to perform their assigned duties in the performance of this Agreement;

(d) protect employee records through administrative, physical and technological safeguards to ensure adequate controls are in place to protect the employee's records and information;

(e) notify SBBC immediately upon discovery of a breach of confidentiality of employee records by telephone at 754-321-0300 (Manager, Information Security), and 754-321-1900 (Privacy Officer), and email at privacy@browardschools.com; and take all necessary notification steps as may be required by federal and Florida law, including, but not limited to, those required by Section 501.171, Florida Statutes;

(f) prepare and distribute, at its own cost, any and all required notifications, under federal and Florida Law, or reimburse SBBC any direct costs incurred by SBBC for doing so; and

(g) be responsible for any fines or penalties for failure to meet notice requirements pursuant to federal and/or Florida law. This section shall survive the termination of all performance or obligations under this Agreement.

2.08 Cost of Services and Payment.

(a) Cost of Early Childhood courses. SBBC's cost of the Early Childhood courses, is Four Thousand, Eight Hundred Dollars and 00/100 Cents (\$4,800.00) per teacher, which includes tuition, books, manuals, and three (3) practicum visits.

(b) Payment for Early Childhood courses. Subsequent to registration of each teacher in in the Early Childhood course and same teacher's completion of the summer component

of that course, SM shall submit an appropriate invoice for Three Thousand, Six Hundred Dollars and 00/100 Cents (\$3,600.00) per teacher to SBBC and SBBC will pay same invoice net thirty (30) calendar days. For each teacher that has registered in the Early Childhood course, completed the summer component of that course, and who ultimately completes all remaining Early Childhood course requirements, SM shall submit an appropriate invoice for One Thousand Two Hundred Dollars and 00/100 Cents (\$1,200.00) per teacher to SBBC and SBBC will pay same invoice net thirty (30) calendar days.

(c) **Cost of Elementary I level courses.** SBBC's cost of the Elementary I level courses, is Six Thousand One Hundred Dollars and 00/100 Cents (\$6,100.00) per teacher, which includes tuition, books, manuals, and three (3) practicum visits.

(d) **Payment for Elementary I level courses.** Subsequent to registration of each teacher in in the Elementary I level course and same teacher's completion of the summer component of that course, SM shall submit an appropriate invoice for Four Thousand, Five Hundred Seventy-Five Dollars and 00/100 Cents (\$4,575.00) per teacher to SBBC and SBBC will pay same invoice net thirty (30) calendar days. For each teacher that has registered in the Elementary I level course, completed the summer component of that course, and who ultimately completes all remaining Elementary I level course requirements, SM shall submit an appropriate invoice for One Thousand Five Hundred Twenty-Five Dollars and 00/100 Cents (\$1,525.00) per teacher to SBBC and SBBC will pay same invoice net thirty (30) calendar days.

(e) The total expenditure for services as indicated in Sections 2.08 (a) and/or 2.08 (c), shall not exceed Twenty Four Thousand, Four Hundred Dollars and 00/00 Cents (\$24,400.00) over the term of this Agreement.

2.09 Inspection of SM's Records by SBBC. SM shall establish and maintain books, records and documents (including electronic storage media) sufficient to reflect all income and expenditures of funds provided by SBBC under this Agreement. All SM's applicable records, regardless of the form in which they are kept, shall be open to inspection and subject to audit, inspection, examination, evaluation and/or reproduction, during normal working hours, by SBBC's agent or its authorized representative to permit SBBC to evaluate, analyze and verify the satisfactory performance of the terms and conditions of this Agreement and to evaluate, analyze and verify the applicable business records of SM directly relating to this Agreement in order to verify the accuracy of invoices provided to SBBC. Such audit shall be no more than one (1) time per calendar year.

(a) **Duration of Right to Inspect.** For the purpose of such audits, inspections, examinations, evaluations and/or reproductions, SBBC's agent or authorized representative shall have access to SM's records from the effective date of this Agreement, for the duration of the term of this Agreement, and until the later of five (5) years after the termination of this Agreement or five (5) years after the date of final payment by SBBC to SM pursuant to this Agreement.

(b) **Notice of Inspection.** SBBC's agent or its authorized representative shall provide SM reasonable advance written notice (not to exceed two (2) weeks) of any intended audit, inspection, examination, evaluation and or reproduction.

(c) Audit Site Conditions. SBBC's agent or its authorized representative shall have access to SM's facilities and to any and all records related to this Agreement, and shall be provided adequate and appropriate work space in order to exercise the rights permitted under this section.

(d) Failure to Permit Inspection. Failure by SM to permit audit, inspection, examination, evaluation and/or reproduction as permitted under this section shall constitute grounds for termination of this Agreement by SBBC for cause and shall be grounds for SBBC's denial of some or all of any SM's claims for payment.

(e) Overcharges and Unauthorized Charges. If an audit conducted in accordance with this section discloses overcharges or unauthorized charges to SBBC by SM in excess of two percent (2%) of the total billings under this Agreement, the actual cost of SBBC's audit shall be paid by SM. If the audit discloses billings or charges to which SM is not contractually entitled, SM shall pay said sum to SBBC within twenty (20) calendar days of receipt of written demand unless otherwise agreed to in writing by both parties.

(f) Inspection of Subcontractor's Records. If applicable, SM shall require any and all subcontractors, insurance agents and material suppliers (hereafter referred to as "Payees") providing services or goods with regard to this Agreement to comply with the requirements of this section by insertion of such requirements in any written subcontract. Failure by SM to include such requirements in any subcontract shall constitute grounds for termination of this Agreement by SBBC for cause and shall be grounds for the exclusion of some or all of any Payees' costs from amounts payable by SBBC to SM pursuant to this Agreement and such excluded costs shall become the liability of SM.

(g) Inspector General Audits. SM shall comply and cooperate immediately with any inspections, reviews, investigations, or audits deemed necessary by the Florida Office of the Inspector General or by any other state or federal officials.

2.10 Notice. When any of the parties desire to give notice to the other, such notice must be in writing, sent by U.S. Mail, postage prepaid, addressed to the party for whom it is intended at the place last specified; the place for giving notice shall remain such until it is changed by written notice in compliance with the provisions of this paragraph. For the present, the Parties designate the following as the respective places for giving notice:

To SBBC: Superintendent of Schools
The School Board of Broward County, Florida
600 Southeast Third Avenue
Fort Lauderdale, Florida 33301

With a Copy to: Director
Innovative Programs Design/Support
The Schools Board of Broward County, Florida
600 Southeast Third Avenue, Fourth Floor
Fort Lauderdale, Florida 33301

To SM: Judy Dempsey, Director
Summit Montessori Teacher Training Institute, L.L.C.
5451 Southwest 64th Avenue
Davie, Florida 33314

2.11 **Background Screening.** SM shall comply with all requirements of Sections 1012.32 and 1012.465, Florida Statutes, and all of its personnel who (1) are to be permitted access to school grounds when students are present, (2) will have direct contact with students, or (3) have access or control of school funds, will successfully complete the background screening required by the referenced statutes and meet the standards established by the statutes. This background screening will be conducted by SBBC in advance of SM or its personnel providing any services under the conditions described in the previous sentence. SM shall bear the cost of acquiring the background screening required by Section 1012.32, Florida Statutes, and any fee imposed by the Florida Department of Law Enforcement to maintain the fingerprints provided with respect to SM and its personnel. The parties agree that the failure of SM to perform any of the duties described in this section shall constitute a material breach of this Agreement entitling SBBC to terminate immediately with no further responsibilities or duties to perform under this Agreement. SM agrees to indemnify and hold harmless SBBC, its officers and employees from any liability in the form of physical or mental injury, death or property damage resulting from SM's failure to comply with the requirements of this section or with Sections 1012.32 and 1012.465, Florida Statutes.

2.12 **Public Records.** The following provisions are required by Section 119.0701, Florida Statutes, and may not be amended. SM shall keep and maintain public records required by SBBC to perform the services required under this Agreement. Upon request from SBBC's custodian of public records, SM shall provide SBBC with a copy of any requested public records or to allow the requested public records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes, or as otherwise provided by law. SM shall ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the Agreement's term and following completion of the Agreement if SM does not transfer the public records to SBBC. Upon completion of the Agreement, *Insert Name* shall transfer, at no cost, to SBBC all public records in possession of SM or keep and maintain public records required by SBBC to perform the services required under the Agreement. If SM transfers all public records to SBBC upon completion of the Agreement, SM shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If SM keeps and maintains public records upon completion of the Agreement, SM shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to SBBC, upon request from SBBC's custodian of public records, in a format that is compatible with SBBC's information technology systems.

IF A PARTY TO THIS AGREEMENT HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO ITS DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THE AGREEMENT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT 754-321-1900, RECORDREQUESTS@BROWARDSCHOOLS.COM, RISK MANAGEMENT DEPARTMENT, PUBLIC RECORDS DIVISION, 600 SOUTHEAST THIRD AVENUE, FORT LAUDERDALE, FLORIDA 33301.

2.13 **Liability.** This section shall survive the termination of all performance or obligations under this Agreement and shall be fully binding until such time as any proceeding brought on account of this Agreement is barred by any applicable statute of limitations.

(a) **By SBBC:** SBBC agrees to be fully responsible up to the limits of Section 768.28, Florida Statutes, for its acts of negligence, or its employees' acts of negligence when acting within the scope of their employment and agrees to be liable for any damages resulting from said negligence.

(b) **By SM:** SM agrees to indemnify, hold harmless and defend SBBC, its agents, servants, and employees from any and all claims, judgments, costs, and expenses including, but not limited to, reasonable attorney's fees, reasonable investigative and discovery costs, court costs and all other sums which SBBC, its agents, servants and employees may pay or become obligated to pay on account of any, all and every claim or demand, or assertion of liability, or any claim or action founded thereon, arising or alleged to have arisen out of the products, goods or services furnished by SM, its agents, servants or employees; the equipment of SM, its agents, servants or employees while such equipment is on premises owned or controlled by SBBC; or the negligence of SM or the negligence of SM agents when acting within the scope of their employment, whether such claims, judgments, costs and expenses be for damages, damage to property including SBBC's property, and injury or death of any person whether employed by SM, SBBC or otherwise.

2.14 **Insurance Requirements.** SM shall comply with the following insurance requirements throughout the term of this Agreement.

(a) **General Liability.** Limits not less than \$1,000,000 per occurrence for Bodily Injury/ Property Damage; \$1,000,000 General Aggregate. Limits not less than \$1,000,000 for Products/Completed Operations Aggregate.

(b) **Professional Liability/Errors & Omissions.** Limit not less than \$1,000,000 per occurrence covering services provided under this Agreement.

(c) **Workers' Compensation.** Florida Statutory limits in accordance with Chapter 440; Florida Statutes, Employer's Liability limits not less than \$100,000/\$100,000/\$500,000 (each accident/disease-each employee/disease-policy limit).

(d) **Auto Liability.** Owned, Non-Owned and Hired Auto Liability with Bodily Injury and Property Damage limits of not less than \$1,000,000 Combined Single Limit.

(e) **Acceptability of Insurance Carriers.** The insurance policies shall be issued by companies qualified to do business in the State of Florida. The insurance companies must be rated at least A- VI by AM Best or Aa3 by Moody's Investor Service.

(f) **Verification of Coverage.** Proof of Insurance must be furnished within 15 calendar days of execution of this Agreement. To streamline this process, SBBC has partnered with EXIGIS Risk Works to collect and verify insurance documentation. All certificates (and any required documents) must be received and approved by SBBC before any work commences to permit SM time to remedy any deficiencies. Please verify your account information and provide contact details for your company's Insurance Agent via the link provided in the email upon award.

(g) **Required Conditions.** Liability policies must contain the following provisions. In addition, the following wording must be included on the Certificate of Insurance:

- 1) The School Board of Broward County, Florida, its members, officers, employees, and agents are added as additional insured;
- 2) All liability policies are primary of all other valid and collectable coverage maintained by The School Board of Broward County, Florida; and
- 3) Certificate Holder: The School Board of Broward County, Florida, c/o EXIGIS Risk Management Services, P. O. Box 4668-ECM, New York, New York 10163-4668.

(h) **Cancellation of Insurance.** SM is prohibited from providing services under this Agreement with SBBC without the minimum required insurance coverage and must notify SBBC within two (2) business days if required insurance is cancelled.

(i) SBBC reserves the right to review, reject or accept any required policies of insurance, including limits, coverage's or endorsements, herein throughout the term of this agreement.

2.15 **Equal Opportunity Provision.** The parties agree that no person shall be subjected to discrimination because of age, race, color, disability, gender identity, gender expression, marital status, national origin, religion, sex or sexual orientation in the performance of the parties' respective duties, responsibilities and obligations under this Agreement.

2.16 **Annual Appropriation.** The performance and obligations of SBBC under this Agreement shall be contingent upon an annual budgetary appropriation by its governing body. If SBBC does not allocate funds for the payment of services or products to be provided under this Agreement, this Agreement may be terminated by SBBC at the end of the period for which funds have been allocated. SBBC shall notify the other party at the earliest possible time before such termination. No penalty shall accrue to SBBC in the event this provision is exercised, and SBBC shall not be obligated or liable for any future payments due or any damages as a result of termination under this section.

2.17 **Excess Funds.** Any party receiving funds paid by SBBC under this Agreement agrees to promptly notify SBBC of any funds erroneously received from SBBC upon the discovery of such erroneous payment or overpayment. Any such excess funds shall be refunded to SBBC.

ARTICLE 3 – GENERAL CONDITIONS

3.01 **No Waiver of Sovereign Immunity.** Nothing herein is intended to serve as a waiver of sovereign immunity by any agency or political subdivision to which sovereign immunity may be applicable or of any rights or limits to liability existing under Section 768.28, Florida Statutes. This section shall survive the termination of all performance or obligations under this Agreement and shall be fully binding until such time as any proceeding brought on account of this Agreement is barred by any applicable statute of limitations.

3.02 **No Third Party Beneficiaries.** The parties expressly acknowledge that it is not their intent to create or confer any rights or obligations in or upon any third person or entity under this Agreement. None of the parties intend to directly or substantially benefit a third party

by this Agreement. The parties agree that there are no third party beneficiaries to this Agreement and that no third party shall be entitled to assert a claim against any of the parties based upon this Agreement. Nothing herein shall be construed as consent by an agency or political subdivision of the State of Florida to be sued by third parties in any matter arising out of any Agreement.

3.03 **Independent Contractor.** The parties to this Agreement shall at all times be acting in the capacity of independent contractors and not as an officer, employee or agent of one another. Neither party or its respective agents, employees, subcontractors or assignees shall represent to others that it has the authority to bind the other party unless specifically authorized in writing to do so. No right to SBBC retirement, leave benefits or any other benefits of SBBC employees shall exist as a result of the performance of any duties or responsibilities under this Agreement. SBBC shall not be responsible for social security, withholding taxes, contributions to unemployment compensation funds or insurance for the other party or the other party's officers, employees, agents, subcontractors or assignees.

3.04 **Default.** The parties agree that, in the event that either party is in default of its obligations under this Agreement, the non-defaulting party shall provide to the defaulting party (30) calendar days written notice to cure the default. However, in the event said default cannot be cured within said thirty (30) calendar day period and the defaulting party is diligently attempting in good faith to cure same, the time period shall be reasonably extended to allow the defaulting party additional cure time. Upon the occurrence of a default that is not cured during the applicable cure period, this Agreement may be terminated by the non-defaulting party upon thirty (30) calendar days notice. This remedy is not intended to be exclusive of any other remedy, and each and every such remedy shall be cumulative and shall be in addition to every other remedy now or hereafter existing at law or in equity or by statute or otherwise. No single or partial exercise by any party of any right, power, or remedy hereunder shall preclude any other or future exercise thereof. Nothing in this section shall be construed to preclude termination for convenience pursuant to Section 3.05.

3.05 **Termination.** This Agreement may be canceled with or without cause by SBBC during the term hereof upon thirty (30) calendar days written notice to the other parties of its desire to terminate this Agreement. In the event of such termination, SBBC shall be entitled to a *pro rata* refund of any pre-paid amounts for any services scheduled to be delivered after the effective date of such termination. SBBC shall have no liability for any property left on SBBC's property by any party to this Agreement after the termination of this Agreement. Any party contracting with SBBC under this Agreement agrees that any of its property placed upon SBBC's facilities pursuant to this Agreement shall be removed within ten (10) business days following the termination, conclusion or cancellation of this Agreement and that any such property remaining upon SBBC's facilities after that time shall be deemed to be abandoned, title to such property shall pass to SBBC, and SBBC may use or dispose of such property as SBBC deems fit and appropriate.

3.06 **Compliance with Laws.** Each party shall comply with all applicable federal, state and local laws, SBBC policies, codes, rules and regulations in performing its duties, responsibilities, and obligations pursuant to this Agreement.

3.07 **Place of Performance.** All obligations of SBBC under the terms of this Agreement are reasonably susceptible of being performed in Broward County, Florida and shall be payable and performable in Broward County, Florida.

3.08 **Governing Law and Venue.** This Agreement shall be interpreted and construed in accordance with and governed by the laws of the State of Florida. Any controversies or legal problems arising out of this Agreement and any action involving the enforcement or interpretation of any rights hereunder shall be submitted exclusively to the jurisdiction of the State courts of the Seventeenth Judicial Circuit of Broward County, Florida or to the jurisdiction of the United States District Court for the Southern District of Florida. Each party agrees and admits that the state courts of the Seventeenth Judicial Circuit of Broward County, Florida or the United States District Court for the Southern District of Florida shall have jurisdiction over it for any dispute arising under this Agreement.

3.09 **Entirety of Agreement.** This document incorporates and includes all prior negotiations, correspondence, conversations, agreements and understandings applicable to the matters contained herein and the parties agree that there are no commitments, agreements or understandings concerning the subject matter of this Agreement that are not contained in this document. Accordingly, the parties agree that no deviation from the terms hereof shall be predicated upon any prior representations or agreements, whether oral or written.

3.10 **Binding Effect.** This Agreement shall be binding upon and inure to the benefit of the parties hereto and their respective successors and assigns.

3.11 **Assignment.** Neither this Agreement nor any interest herein may be assigned, transferred or encumbered by any party without the prior written consent of the other party. There shall be no partial assignments of this Agreement including, without limitation, the partial assignment of any right to receive payments from SBBC.

3.12 **Captions.** The captions, section designations, section numbers, article numbers, titles and headings appearing in this Agreement are inserted only as a matter of convenience, have no substantive meaning, and in no way define, limit, construe or describe the scope or intent of such articles or sections of this Agreement, nor in any way affect this Agreement and shall not be construed to create a conflict with the provisions of this Agreement.

3.13 **Severability.** In the event that any one or more of the sections, paragraphs, sentences, clauses or provisions contained in this Agreement is held by a court of competent jurisdiction to be invalid, illegal, unlawful, unenforceable or void in any respect, such shall not affect the remaining portions of this Agreement and the same shall remain in full force and effect as if such invalid, illegal, unlawful, unenforceable or void sections, paragraphs, sentences, clauses or provisions had never been included herein.

3.14 **Preparation of Agreement.** The parties acknowledge that they have sought and obtained whatever competent advice and counsel as was necessary for them to form a full and complete understanding of all rights and obligations herein and that the preparation of this Agreement has been their joint effort. The language agreed to herein expresses their mutual intent and the resulting document shall not, solely as a matter of judicial construction, be construed more severely against one of the parties than the other.

3.15 **Amendments.** No modification, amendment, or alteration in the terms or conditions contained herein shall be effective unless contained in a written document prepared with the same or similar formality as this Agreement and executed by each party hereto.

3.16 **Waiver.** The parties agree that each requirement, duty, and obligation set forth herein is substantial and important to the formation of this Agreement and, therefore, is a material term hereof. Any party's failure to enforce any provision of this Agreement shall not be deemed a waiver of such provision or modification of this Agreement unless the waiver is in writing and signed by the party waiving such provision. A written waiver shall only be effective as to the specific instance for which it is obtained and shall not be deemed a continuing or future waiver.

3.17 **Force Majeure.** Neither party shall be obligated to perform any duty, requirement or obligation under this Agreement if such performance is prevented by fire, hurricane, earthquake, explosion, wars, sabotage, accident, flood, acts of God, strikes, or other labor disputes, riot or civil commotions, or by reason of any other matter or condition beyond the control of either party and which cannot be overcome by reasonable diligence and without unusual expense ("Force Majeure"). In no event shall a lack of funds on the part of either party be deemed Force Majeure.

3.18 **Survival.** All representations and warranties made herein, indemnification obligations, obligations to reimburse SBBC, obligations to maintain and allow inspection and audit of records and property, obligations to maintain the confidentiality of records, reporting requirements, and obligations to return public funds shall survive the termination of this Agreement.

3.19 **Agreement Administration.** SBBC has delegated authority to the Superintendent of Schools or his/her designee to take any actions necessary to implement and administer this Agreement.

3.20 **Counterparts and Multiple Originals.** This Agreement may be executed in multiple originals and may be executed in counterparts, each of which shall be deemed to be an original, but all of which, taken together, shall constitute one and the same Agreement.

3.21 **Authority.** Each person signing this Agreement on behalf of either party individually warrants that he or she has full legal power to execute this Agreement on behalf of the party for whom he or she is signing and to bind and obligate such party with respect to all provisions contained in this Agreement.

IN WITNESS WHEREOF, the Parties hereto have made and executed this Agreement on the date first above written.

[THIS SPACE INTENTIONALLY LEFT BLANK; SIGNATURE PAGES FOLLOW]

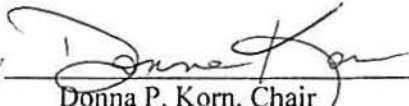
FOR SBBC:

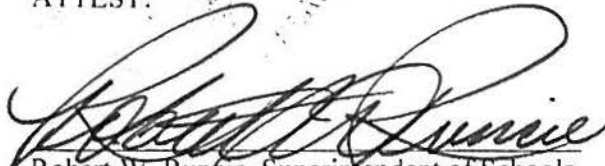
(Corporate Seal)

THE SCHOOL BOARD OF BROWARD
COUNTY, FLORIDA

ATTEST:

By


Donna P. Korn, Chair


Robert W. Runéie, Superintendent of Schools

Approved as to Form and Legal Content:



Digitally signed by Kathelyn Jacques-Adams, Esq. - kathelyn.jacques-adams@gbrowardschools.com
Reason: Summit Montessori Teacher Training Institute, L.L.C.
Date: 2020.05.01 10:59:08 -04'00'

Office of the General Counsel

[THIS SPACE INTENTIONALLY LEFT BLANK; SIGNATURE PAGE FOLLOWS]

FOR SM

(Corporate Seal)

Summit Montessori Teacher Training
Institute, L.L.C.

ATTEST:

By Judy Dempsey
Judy Dempsey, Director

_____, Secretary

-or-
Ann McMillen
Witness

G. Zorabek
Witness

**The Following Notarization is Required for Every Agreement Without Regard to
Whether the Party Chose to Use a Secretary's Attestation or Two (2) Witnesses.**

STATE OF FL

COUNTY OF Broward

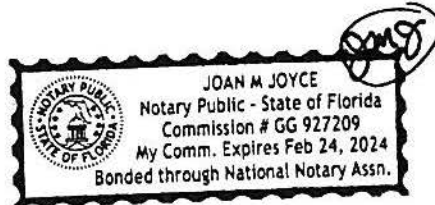
The foregoing instrument was acknowledged before me by means of physical presence
or online notarization, this 4/30/20 (date) by
JUDY DEMPSEY, Director (name of officer or agent, title of officer or agent) of
SUMMIT MONTESSORI TEACHER TRAINING INST (name of corporation acknowledging), a
FL (state or place of incorporation) corporation, on behalf of the
corporation. He/she is personally known to me or has produced
_____ (type of identification) as identification and who did / did not
first take an oath this 30th day of April, 2020.

My Commission Expires:

Joan M Joyce
Signature - Notary Public

JOAN M JOYCE
Notary's Printed Name

(SEAL)



Notary's Commission No.