



### Agreement for Consulting Services

- A. Client:** Cedar Rapids Community School District
- B. Primary Contact:** Dr. Tawana Grover, Superintendent  
[tgrover@crschools.us](mailto:tgrover@crschools.us)
- C. Timeframe:** June 2023 – March 2024
- D. Consulting Description:** Organizational Health Journey, including:  
A = Offsites (3): Executive Cabinet  
B = Offsite (1): Extended Cabinet, Executive Council & Executive Cabinet  
C = Offsite (1): Board
- E. Offsite Dates:** A = June 2023 | September 2023 | March 2024  
B & C = January 2024
- F. Consulting Resource:** Amie Gamboian, Principal Consultant
- G. Quarterly Fees:**  
a. Consulting: \$35K (*discounted from \$39K*)  
b. Materials: A) \$200/person  
B & C) \$75/person
- H. Travel Expenses:** At reasonable cost (lodging, mileage, meals, etc.)
- I. Invoicing & Payment:** Invoices and W-9 provided quarterly. Payment due within 30 days to *Who You Are Leadership Coaching & Consulting*.
- J. Cancellation/Rescheduling:** If any session is cancelled, CRCSD agrees to pay 50% of the quarterly consulting and materials fees for that session. If rescheduling occurs for any session, CRCSD agrees to pay a \$5,000 reschedule fee. Such fees represent reasonable estimates of lost fees associated with client dedication, session preparation & reservation of dates. \* Please initial \_\_\_\_\_

**Amie Gamboian**

Principal Consultant | The Table Group

402.679.0759 | [amie.gamboian@tablegroupconsulting.com](mailto:amie.gamboian@tablegroupconsulting.com)

**M. Both parties agree to the terms of this contract. Please sign and return to Amie Gamboian.**

For Table Group:

For Cedar Rapids Community School District:

*Amie Gamboian* (electronic signature)

5/3/23

Amie Gamboian, Principal Consultant &  
CEO, Who You Are© Leadership Coaching

\_\_\_\_\_  
Dr. Tawana Grover, Superintendent      Date

Note: The following pages include Appendix A, B, and C.

## **Appendix A**

### **Organizational Health Journey: Executive Cabinet**

This Table Group Consulting Engagement in partnership with Cedar Rapids Community School District includes:

#### Executive Cabinet Offsite Pre-Work & Session Design & Deliverables

June 2023 | September 2023 | March 2024:

Pre-work begins approximately 30 days prior to each Executive Cabinet offsite. In addition to team members completing some pre-work, the final design and agenda will be set. The elements of pre-work include:

- o Pre-session calls with Dr. Grover for agenda design and session objectives.
- o All team members will have pre-work to complete prior to the offsites (approximately 1 hour worth).
- o For each offsite: Call with Dr. Grover to finalize agenda, review changes to team dynamics, and provide recommendations on opening comments and key leadership contributions during the offsite.
- o Offsite sessions focused on mastering the four disciplines of organizational health
- o Post-offsite deliverables: Playbook, Offsite Notes, PDF of flip chart session work
- o Online Meeting Advantage Tool
- o Meeting observation and coaching (will facilitate first tactical and strategic meetings if desired)
- o Post offsite session coaching with Dr. Grover which includes:
  - o Assessments of each team member and coaching recommendations
  - o Review of Playbook, Offsite Notes, etc.
- o General Executive Council support, including next steps, additional resources, etc.
- o Following March 2024 offsite: baton-pass to internal organizational health champion for ongoing client alumni support.

## **Appendix B**

### **Organizational Health Journey: Extended Cabinet + Executive Council**

This Table Group Consulting Engagement in partnership with Cedar Rapids Community School District also includes:

#### TEAMinar (Executive Cabinet + Extended Cabinet + Executive Council) Pre-Work & Session Design January 2024:

Pre-work begins approximately 30 days prior to the TEAMinar. In addition to team members completing some pre-work, the final design and agenda will be set. The elements of pre-work include:

- o Pre-session call with Dr. Grover for agenda design, session objectives and recommended key leadership contributions during the offsite.
- o All team members will have pre-work to complete prior to the offsite that includes a Team Assessment (abridged version), Working Genius assessment, and reading a book summary. This prework will take about 30 minutes total.
- o Pre-session call with Executive Cabinet to discuss agenda and their roles in the TEAMinar.

#### TEAMinar Session and Post-Session Deliverables:

- o One-day session focused on building team cohesion and cascading organizational clarity.
- o Mini Team Assessment of each intact team.
- o Working Genius Reports and intact team maps.
- o Session materials and deliverables include the following:
  - o Session workbooks
  - o Mini Team Assessment results, Individual Working Genius Reports and Team Map(s)
  - o PDF of all flip chart session work
  - o Slide deck, if utilized
- o Post-TEAMinar debrief call with Dr. Grover.
- o Post-TEAMinar debrief call with Executive Cabinet to outline next step recommendations.

## **Appendix C**

### **Organizational Health Journey: The Board**

This Table Group Consulting Engagement in partnership with Cedar Rapids Community School District also includes:

#### Board Offsite Pre-Work & Session Design & Deliverables

January 2024:

- o Pre-session calls with Dr. Grover for agenda design and session objectives.
- o All team members will have pre-work to complete prior to the offsite that includes the Team Assessment, Working Genius assessment, and reading a book summary. This prework will take about 30 minutes total.
- o One-day session focused on building team cohesion and cascading organizational clarity
  - o Team Assessment Report and Analysis
  - o 6 Types of Working Genius Reports
  - o Building Team Cohesion and Understanding Organizational Clarity
- o Session materials and deliverables include the following:
  - o Session workbooks
  - o Team Assessment Report, Individual Working Genius Reports and Team Map
  - o PDF of all flip chart session work
- o Post-session coaching call with Dr. Grover to review offsite experience, team dynamics, individual team members' contributions, Offsite Notes, and next steps.



## Consulting Services Proposal

PREPARED FOR

Dr. Tawana Grover, Superintendent  
Cedar Rapids Community School District

May 1, 2023

Amie Gamboian  
Principal Consultant, Table Group  
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## Executive Summary

At the Table Group, we believe organizational health creates a necessary intersection between culture, management, operations, and strategy to maximize human potential and align teams around common objectives. Successful organizations that experience sustainable success share two qualities: they are both *smart* and *healthy*. This is important during any season for an organization to thrive, but it has added significance during transitional seasons that are often plagued by unrest, lack of trust, and instability.

Organizations that are only smart put a disproportionate amount of focus on financials, technology, marketing, and day-to-day operations. Without equal emphasis on team health, even the smartest organizations waste resources battling behavior challenges and priority misalignment, both contributing to costly people issues, leadership ineffectiveness, debilitating inefficiencies, and failed outcomes.

Healthy organizations not only succeed with the smarts and daily operations, but also build team cohesion and operate from extreme clarity. This prevents the culture erosion that runs rampant in unhealthy organizations through back channels of confusion, politics, and silos. Healthy teams consistently achieve goals and strategic plans while experiencing the fulfillment of a shared vision.

For most teams, Table Group principles are simple to know but challenging to accomplish. However, the teams that master them create unparalleled impact throughout their entire organizations. The four disciplines of the Table Group Organizational Health process that teams must master are:

1. **Building a Cohesive Leadership Team**
2. **Creating Clarity**
3. **Over-Communicating Clarity**
4. **Reinforcing Clarity through People Systems**

In the spirit of increasing both the smarts and health of the team, we consistently ask two questions: *“What’s the performance state of your organization?”* and *“What’s the behavioral state of your team?”* Intentionally, we avoid overly formal sessions and have a relaxed manner of leading critical conversations, decision-making, and team execution.

Becoming organizationally healthy is not a program, training, or workshop; it’s a process that anchors your cultural identity and defines how you interact and achieve success. Our primary focus isn’t just on an offsite or session; it’s ensuring teams solve their most pressing challenges by leveraging the true advantage organizational health provides.

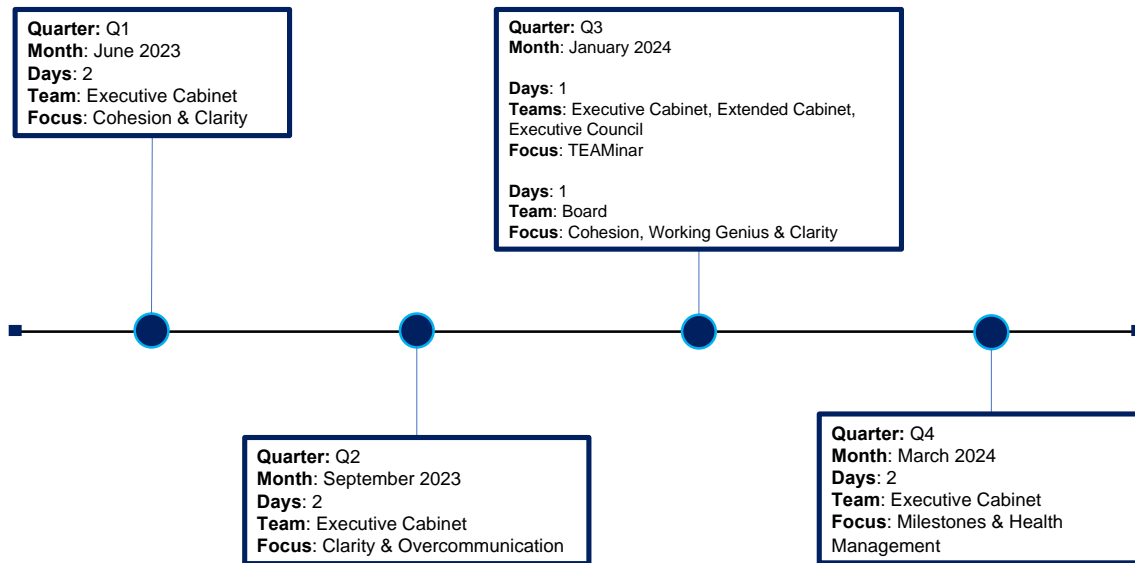
The health transformation for most teams is a 12-month progression (some master the disciplines in as little as 9 months; for others it can take up to 18 months). Going faster does not necessarily indicate greater cultural health. The key is attaining long-lasting and positive change that will ultimately lead to transformation throughout the district. You will be equipped to build additional culture enhancements on the foundation your organizational health will provide.

This scope of services outlines a comprehensive 12-month organizational health journey, with each quarter anchored in an offsite session. This process includes (a) basic pre-work before sessions, (b) an offsite session (1-2 days), (c) follow-up teamwork and key deliverables, and d) executive coaching for the Superintendent. While the *focus* of each session is on certain disciplines (ex. Discipline 1 and 2), we do not derive best results with

teams by working linearly through the process. Therefore, the work within each quarter will include elements of all four health disciplines.

## Overview of the Journey

The following is a sample of the recommended focus for each quarter, but every organization has a unique journey in mastering the disciplines. As the year progresses, adjustments will be made to ensure results are obtained.



## Quarter 1 | Discovery and Team Assessment | Executive Cabinet

The first 90 days are a critical time of discovery and assessment to understand more about the team, organization strategy and culture, internal communication, processes, and procedures, and where the improvement opportunities are.

- Engage in assessment/coaching calls with the Superintendent
- Administer Team Assessments:
  - Table Group's exclusive Team Assessment based on Five Behaviors model
  - Table Group's exclusive 6 Types of Working Genius Assessment
- Pre-offsite coaching for Superintendent which includes:
  - Identifying offsite objectives
  - Role in offsite (opening message, go first/last, accountability)
- Initial 2-day Executive Cabinet offsite session focused on cohesion and clarity
- Post-offsite deliverables: Playbook, Offsite Notes, PDF of flip chart session work
- Online Meeting Advantage Tool
- Meeting observation and coaching (will facilitate first tactical and strategic meetings if desired)
- Post offsite session coaching for the Superintendent which includes:
  - Assessments of each team member and coaching recommendations
  - Review of Playbook, Offsite Notes, etc.



## **Quarter 2 | Confirm Clarity & Practice Overcommunication | Executive Cabinet**

The second quarter is about implementation of concepts learned in the initial offsite session. During this time, the focus is on:

- Executive Cabinet overcoming the five dysfunctions of teams.
  - Advancing vulnerability-based trust, engaging in healthy conflict, honestly committing to team decisions, providing peer-to-peer accountability, focusing on collective results
- Using Clarity framework as the leadership filter in decision making.
- Second 2-day Executive Cabinet offsite session with focus on:
  - Addressing what's going well and what improvements are needed
  - Make necessary adjustments to Clarity
  - Deeper dive on Working Genius
  - Strategic Issues
  - TEAMinar roll-out plan for next-level leaders
- Mastering the Meetings Model
  - Tactical and Strategic meeting observations and coaching.
  - Tactical meetings: Ensure alignment with meeting format, real-time agenda emphasis on Rally Cry and Defining/Standard Objectives, and cascading communication
  - Strategic meetings: Coaching the team in pre-reads, opening framework for healthy debate, decision-making rights, and closure using real-time strategic topics
- Coach Superintendent to keep team on topic while driving to clarity and closure
- Coach Superintendent on her role in clarifying decision-making rights
- Informal messaging of Clarity district-wide
  - The informal nature of the communication at this point helps confirm Clarity and plants seeds. When the full roll-out occurs, employees find it as true of the district, rather than messaging from a consulting firm.

## **Quarter 3 | Clarity Roll Out | Extended Cabinet, Executive Council & Board**

Now that the Executive Cabinet has increased its team cohesion and cultural clarity, it's time to do an official roll out (Overcommunicating Clarity) to other key district leaders. The organizational health evolution is led by the work with the Executive Cabinet but is sustained through this next level work. The focus for this quarter is on:

- Pre-TEAMinar Team 1 coaching: Agenda, roles, group process questions, clarity
- 1-day TEAMinar session
  - Includes Executive Cabinet, Extended Cabinet and Executive Council members: Building Team Cohesion, 6 Types of Working Genius, and the Organizational Clarity Roll Out
- 1- day Board offsite session
  - Team Assessment Report and Analysis
  - Building Team Cohesion, 6 Types of Working Genius, and Understanding Organizational Clarity
- Post-TEAMinar coaching for Team 1 on next steps with TEAMinar participants

## Quarter 4 | Milestones & Health Management | Executive Cabinet

2-day Executive Cabinet offsite focused on fine-tuning four disciplines: Team Assessment Progress Report will affirm improvements of the Executive Cabinet on the Five Behaviors model and provide data necessary in holding the team accountable to advancing lagging development areas

- Cascading information (over-communicating Clarity)
- Improving the strategic alignment district-wide with the Executive Cabinet
- Meeting Cleanse: Individuals and Team 1
- Priority Gallery: The Test of a True Team 1

## Foundational Resources

Our work is anchored in the concepts shared in these best-sellers by Patrick Lencioni, founder of the Table Group: *The Advantage*, *The Five Dysfunctions of a Team*, *Death by Meeting* and *The 6 Types of Working Genius*.

## Team Outcomes

- Increased confidence district-wide: we know who we are, we know how we behave, we understand what to focus on, we are aligned in our priorities, we consistently achieve our desired outcomes.
- Cohesive leadership teams that demonstrate trust, practice ideological conflict, have no “undiscussable” topics, are committed to clear decisions, hold one another accountable to decisions, and focus on *collective* results.
- Clarity and alignment top-down and cross-functionally.
- Immediate application of Working Genius in meetings, problem solving, and achieving objectives.
- Better, faster decisions leading to desired business results and performance.
- More agile and seamless execution.
- Decreased politics, silos, and turf behaviors.
- Stronger retention of best employees and greater attraction of top talent.
- More efficient and productive meetings.
- Strategies for cascading clarity district wide.

## Sample Agenda for Initial 2-day Offsite with Executive Cabinet

### The Foundation of Organizational Health

- Smart + Healthy = Sustainable Success
- Mastering the Four Disciplines of Healthy Organizations
- Overcoming the Five Dysfunctions of Teams
- Team 1 = It's More Than a Group Name

### Build a Cohesive Team

- Data Analysis of Team Assessment Results
- Build Vulnerability-Based Trust
- Leverage Working Genius Individual Reports and Team Productivity Map
- Establish Team Norms for Conflict, Commitment and Accountability

## Clarity Questions & Team Exercises

- Why do we Exist? (Core Purpose)
- How do we Behave? (Core Values)
- What do we Do? (Business Definition)
- How will we Succeed? (Strategic Anchors)
- What's Most Important, Right Now? (Rally Cry/Thematic Goal)
- Who's responsible for What? (Role Clarity, Ownership + Accountability)

## Battle Plans: Defining Objectives and Standard Operating Objectives

- Champion
- Success Statement
- Timeframe
- Key Milestones, Objectives, Metrics
- Obstacles to Success

## Meeting Model Disciplines

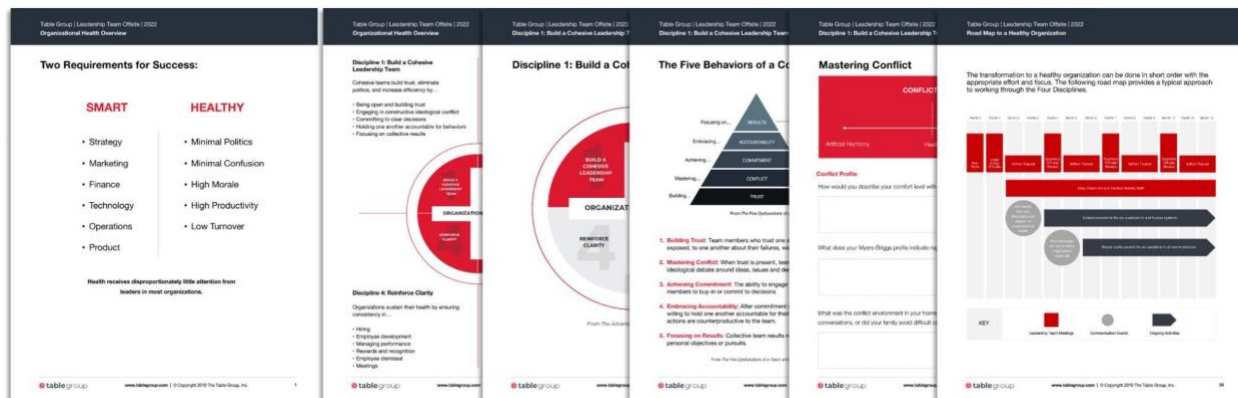
- Daily Huddle
- Weekly Tactical
- Ad-hoc Strategic
- Quarterly Developmental

## Team Effectiveness Exercise & Personal Commitments

## Decisions/Actions/Cascading Communication

## Tools and Resources

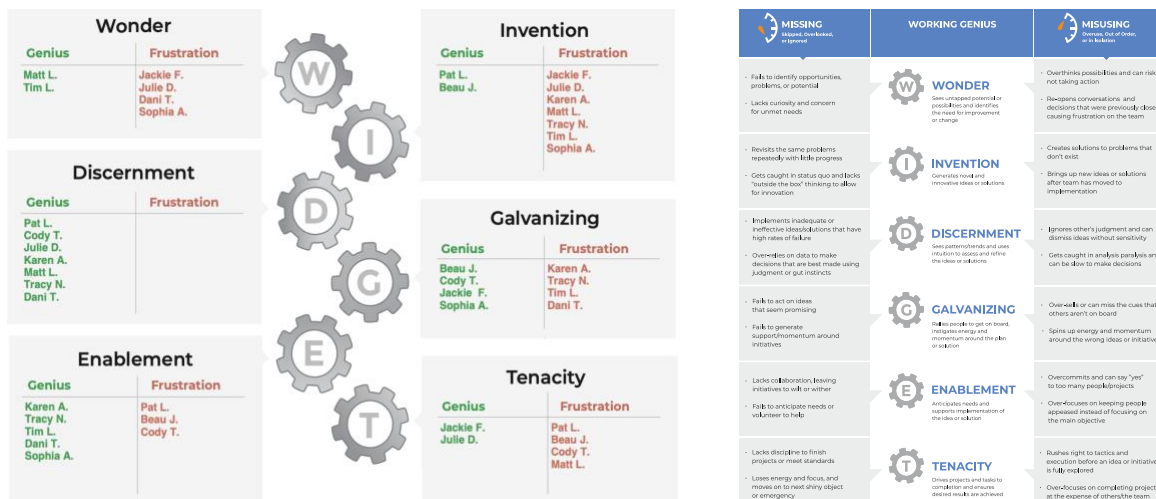
**Sample Table Group Workbook:** Provides clear visuals and explanations of models and session work.



**Sample Table Group Team Assessment:** Anonymous survey taken by Executive Cabinet members as a benchmarking tool to accurately assess the positive and challenging behaviors affecting team performance. *(Mini assessment most likely to be used with Extended Cabinet, Executive Council. It is recommended that the Board use the full Team Assessment.)*



**Sample Working Genius Team Report and Tools:** Individual assessments taken by each team member are compiled into team maps for analysis and strategy. Additional Working Genius tools help teams leverage geniuses, fill gaps presented by frustrations, and collaborate more effectively from start to finish on projects and initiatives.



**Sample Playbook:** Provided to each Executive Cabinet member to keep organizational health at the forefront of meetings, decision-making, and strategy sessions. It is updated as the team achieves its Rally Cry, Personal Commitments, etc. The Clarity portion of the Playbook will be provided to the Extended Cabinet, Executive Council, and Board in respective sessions.

**Sample Company | Senior Team Playbook | January 2022**  
**Team Profile**

**Team Assessment Focus Areas**

- During discussions, team members challenge one another about how they spend at their agencies and consultants.
- Team members are quick to confront peers about problems in their respective areas of responsibility.
- Team members ask one another for input regarding their areas of responsibility.

**Myers-Briggs Types**

Name	Role	MBTI	Personality	Working Style	Working Preference
Kevin	CEO	ENFP	Idealist	1.5	1.5
Joe	COO	ENFP	Idealist	1.5	1.5
Erica	COO	ENFJ	Guardian	1.5	1.5
Alan	VP of Sales	ENFJ	Guardian	1.5	1.5
Sander	VP of Marketing	ENFJ	Guardian	1.5	1.5
<b>Team Type</b>		<b>ENFJ</b>	<b>Idealist</b>		

**Team Norms**

- Leave technology at the door. No more screens.
- No "meeting after the meeting".
- First to "Four" to acknowledge debate.
- Enter the agenda on official track.
- Commitment for consensus.

**Meeting Cadence**

- Only Meeting:** 10:00am - 10:30am Office
- Weekly Tactical:** Mondays @ 10am
- Monthly Strategic:** 2nd Thursday @ 9am and 10am
- Quarterly Offsite:** 1st Tues. 10am of each quarter

**Individual Commitments**

- Kevin - I will regularly communicate to all staff and leadership in a timely fashion.
- Joe - I will follow through with commitments I have made and will be proactive in my role.
- Erica - I will be less defensive when offered constructive criticism.
- Alan - I will speak up during meetings and regularly go to my peers with input and feedback.
- Sander - I will speak less frequently when trying to communicate my ideas to someone who doesn't understand.

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**Sample Company | Leadership Team Playbook | January 2022**  
**Organizational Clarity**

**Question 1: Why do we exist? (Core Purpose)**  
To connect people with the most important events in their lives.

**Question 2: How do we behave? (Core Values)**

- Service First
- Authenticity
- Service Spirit

**Question 3: What do we do? (Business Definition)**  
We market, book and transport passengers via airplane through commercial airports.

**Question 4: How will we succeed? (Strategic Anchors)**

- On-Time
- Low Cost Structure
- Customer Experience/Loyalty

**Question 5: What is most important, right now? (Thematic Goal)**

**Thematic Goal**  
Integrate Acquisition to Our "Way"

**Defining Objectives**

Scheduling/Route Integration	Marketing/Managing PM	Talent Training/Retention	Union/Agency Agreements	Technology/Systems/Equipment
James	Kath	Emily	Ashleigh	Shane

**Standard Operating Objectives**

Finance	Personnel/Bookings	Systems	Talent
	Customer Experience	Partner/Equipment	

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Team profile, norms and meeting cadence.

Answers to 6 clarity questions, distilled and summarized.

Team's Rallying Cry and Defining Objectives.

## Consulting Fees

Description	Amount
Quarterly Consulting Fee	\$35K (Discounted from \$39K)
Travel expenses for Principal Consultant(s)	At Reasonable Cost
Assessments, Session Materials & Deliverables (Executive Cabinet)	\$200/per Person
Assessments, Session Materials & Deliverables (Extended Cabinet, Executive Council, and Board)	\$75/per person

## Appendix A: The Table Group Philosophy

The Table Group serves the mission of *helping organizations, and the people who work within them, become healthier and more effective*. Lencioni's models provide the foundational concept for our firm and serve as the nucleus for our work.

### The Four Disciplines of Healthy Organizations

In Lencioni's bestselling book, *The Advantage*, he provides a framework for excellence based on mastering the four disciplines.



### The Five Behaviors of a Team

In the bestseller, *The Five Dysfunctions of a Team*, Lencioni identifies five behaviors that drive cohesion. Teams achieve cohesion by building deep trust, debating critical issues, making higher quality decisions, utilizing peer-to-peer accountability, and prioritizing collective results.



## **Appendix B:** About Amie Gamboian, Principal Consultant



Amie Gamboian brings over 20 years of leadership and coaching experience to her partnership with the Table Group. As a proven organizational health consultant, she has a track record of delivering lasting client impact by hitting objectives and key performance targets. Amie provides a straight-forward, practical, team-centered approach to organizational health, strategy, and problem-solving.

Amie consults executive teams and leaders in developing leadership cultures that are anchored in team cohesion, extreme clarity, communication effectiveness, and priority alignment. Her clients span a broad range of industries, including automotive, agribusiness, construction, banking, financial services, government, manufacturing, food and beverage, education, software, biosciences, non-profit, and collegiate athletics.

Prior to joining the Table Group, Amie was in private practice serving teams and leaders as an executive coach and consultant. Before that, she created leadership development curriculum for thousands of leaders while leading a team of nearly 2,000 in an international sales company. She has a bachelor's degree in communications from the University of Nebraska-Lincoln and is a former speechwriter for the Governor of Nebraska and proposal writer for the University of Nebraska Foundation.

Amie is actively involved in her Omaha, NE community as Founder and Board Chair of Omaha Leaders, and as a Trustee of the Business Ethics Alliance. Amie and her husband, Peter, have two daughters, Victoria and Julianna, and a Coonhound named Sadie.

### Partial Client List:

- AgriVision-Prairieland Partners
- Chick-fil-A
- Conductix-Wampfler
- H&H Group
- Northwestern Mutual
- Ophelia
- Papillion Fire Department
- Thermo Fisher Scientific
- WP Engine
- YMCA

## **Appendix C: About the Table Group**

The Table Group, a Patrick Lencioni company, was founded by the best-selling author in 1997 to help companies create a competitive advantage through organizational health. The methodologies developed by Lencioni and the Table Group have been introduced and adopted by over 25,000 organizations around the world through consulting services, tools, products, keynote speeches, and best-selling books.

### **Patrick Lencioni's Best Selling Books:**

The Five Temptations of a CEO (1998)

The Four Obsessions of a Healthy Executive (2000)

The Five Dysfunctions of a Team (2002)

Death by Meeting (2004)

Silos, Politics and Turf Wars (2006)

The Three Signs of a Miserable Job (2007)

The Three Big Questions for a Frantic Family (2008)

Getting Naked (2010)

The Advantage (2012)

The Ideal Team Player (2016)

The Motive (2020)

The 6 Types of Working Genius (2022)

The Table Group Consulting Firm is comprised of independent, highly qualified, and experienced consultants who are hand selected and trained by Lencioni and the Table Group. They focus primarily on helping teams master organizational health disciplines.

Table Group Consultants address issues of organizational effectiveness and teamwork within the context of real issues and behaviors, avoiding esoteric and touchy-feely activities that plague too many offsite sessions. Instead, Table Group Consultants address the operational roots of low trust, politics, and confusion, and provide specific strategies for making better, faster decisions and achieving greater buy-in.

A partial Table Group client list includes organizations such as:

- Western Digital Corporation
- Southwest Airlines
- Chick-fil-A
- Rackspace
- Cisco
- Vanguard
- HCA Healthcare
- Microsoft
- St. Jude's Research Hospital
- Compassion International
- HBK Capital
- Intel
- Google