Statement of Work

Corporate Learning Institute and Moorings Park

October 7, 2022

Project Website: https://www.corplearning.com/mp-standards/

Project Objectives

Recently, inconsistencies have been discovered between expected operational standards and brand design standards of operation, and the actual current practices across Moorings Park facilities and departments.

You are seeking to establish a way to ensure consistent brand design and quality standards across all departments at the Moorings Park Institute. This project will culminate in a Standards of Practice document-directory that serves as a digital repository easily accessed by the intended audience.

For the purpose of this statement of work (SOW), development focus shall be placed on five key components, namely:

1. Who we serve and care for
2. How we perform our work
3. How our facilities look and function
4. How we appear to others
5. How we communicate

- Operational standards dictate how something will work and the company to bring innovation to life at communities.

- Brand design standards create uniformity across certain aspects of the retirement community, such as -
    1. professional dress and appearance of staff,
    2. ADA access to public restrooms,
    3. appointed details of common spaces including furnishings,
    4. methods for obtaining assistance,
    5. healthy menu options,
    6. ambiance,
    7. communication technique and much more.

Alignment with brands standards requires a well-articulated guide or manual; even experiential auditing ensures consistency for expected outcomes; everything from lighting, botanicals, music, and scent assessments are just a few examples that fall within this important area of consideration.

When each community of Moorings Park Institute understands what a brand represents, they will be better equipped to deliver service excellence to all residents through the brand promise. Consistent training and educating employees (partners) on brand standards help ensure that resident experience expectations are met or exceeded.

Scope of work
You are seeking to establish a flawless, consistent, and sustainable process for embedding standards of adopted practices across business units, functional areas, staff levels and all departments through Moorings Park Institute. These include but are not limited to:

- Dress and professional appearance
- First Impressions (concierge, gate officers, etc.)
- Communication skills, including telephone

- Correspondence protocols, including emails and text messages
- Etiquette/Politeness
- Listening and problem solving
- Preventative maintenance
- Community appearance, including buildings and grounds
- Certain HR functions, including onboarding new staff members
- Life Safety systems and response protocols
- Transportation and Trams
- Security
- Activities and Lifestyle
- Pets
- Guest rooms and suites
- Housekeeping/Cleaning
- Laundry Services
- Repairs and Refurbishment of homes and common spaces
- Parking
- Guests and Visitors responsibilities
- Health Services and Wellness
- Dining Services
- Wellness/Fitness
- Concierge Medicine
- Lifelong learning
- Assisted Living and Dementia care standards
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The following three phases serves as process steps to achieve the Standards of Practice outcomes:

Phase 1: Discovery Phase
Steps

1. A review and written briefing of several select organization's Standards of Practice, and relationship to:
   - The American Club (Kohler Co.)
   - Novari Health
   - Mather
   - Top-rated hospitals

2. Discover and development of the optimal data gathering approach, either through an editable document or online survey collection. An online survey offers the easiest way to migrate data after collection.

3. The initiation of a master list of consistent brand design and quality standards to use to compare data to.

4. The development of a project core team and number of departmental/functional area task forces with specific goals and role functions to facilitate data collection, interpret meaning and act as a sounding board and ombudsmen for improved standards.

5. Development of calendared meetings with core team members and task forces to ensure project progress and information sharing.

Phase 2: Development Phase
Steps

1. Launch surveys and review data.

2. Gather additional data from all areas of the organization into a common receptable (what we think may be Drobox) via a form created/approved by Moorings Park.

3. Conduct additional interview calls as needed to ensure a clear capture and understanding of submitted data.

4. The sorting and processing of data into meaningful and succinct inputs.

5. The comparing of data received to best practices obtained through the core team and task forces.

6. The creation of the master data base for storing completed data.

Phase 3: Delivery Phase
Steps

1. Completion and delivery of the digital Standards of Practice document/file/web-based resource.

2. Training to be provided for immediate users on how to access information.

3. Project review meeting to discuss lessons learned and net steps.

Timeline

October	November	December	January	February	March	April	May
Discovery	**Discovery**	**Discovery/ Development**	**Development**	**Development**	**Development**	**Development**	**Delivery**
Begin written brief of researched organizations to benchmark	Start a master list of consistent brand design and quality standards (best practices) -Ross/Renee	Complete the master list of consistent brand design and quality standards (best practices) -Ross/Renee -Task force	Launch survey to all areas of the organization	Close survey to all areas of the organization	Create master data base for storing completed data	Writing and editing of final document (internal)	Completion and delivery of the digital Standards of Practice document/file/web-based resource.
Research survey software: Develop a Dropbox plus survey vehicle	Decide on survey software and build survey using Ross' template Open Dropbox Create instructions	Test-Launch survey to all areas of the organization and gather data into Dropbox	Complete survey to all areas of the organization and gather data into Dropbox	Sort and process data into meaningful and succinct inputs	Compete data sorting	Creation of learning aids and checklists/cross-referencing as needed	Training to be provided for immediate users/task force on how to access information
Consider core team and task force membership	Development of calendared meetings with core team and task forces and invitations extended	Meet with core team and task forces to update and receive input (Monthly through May)	Conduct additional interview calls as needed to ensure a clear capture and understanding of submitted data.	Compare data received to best practices obtained through the core team and task forces.	Draft and presentation to core team	External editor review Graphic design work completed	Project review meeting to discuss lessons learned and net steps.

Milestones

Major Progress Points:

Phase/Action	Anticipated Milestone Completion Date
Discovery - Research Brief and review meeting	November 15
Discovery - Decision on survey software and Dropbox or alternative	November 7, 2022
Discovery - Core team and task force development/invitation/Meeting schedule/Role clarification	November 15
Discovery - Complete master list of best practices	December 20, 2022
Development – Launch Survey	January 5, 2023
Development - Interview calls	January 5-30, 2023
Development – Close survey	February 1, 2023
Development – Complete all data sorting	March 15, 2022
Development – Draft to Ross and core team	March 30, 2023
Development – Revisions, editing and submission of draft for editing and graphic design	April 30, 2023
Delivery – Final product delivered – Training and Presentations	May 15, 2023

Task Roles

The following roles are delineated for each key partner:

CLI

- Become a full partner with Moorings Park to ensure the success of the project.
- Develop and maintain project progress and lead on-going meetings with core team and task force; produce all materials and final product as noted above.

Moorings Park Core Team

Become a full partner with CLI to ensure the success of the project.

- Meet consistently to ensure project is on-course.
- Serve as the editors-in-chief of emerging data and final digital documents.
- Liaison with task force as needed.

Moorings Park Task Force:

- Assist in gathering data from their assigned department or functional area.
- Vet comparisons between old and new standards.
- Introduce and train managers on new content.
- Be an agent for the adoption of new standards in their department or functional area.
- *Will not serve as editors for the final stages of the new content/digital documents.*

Outside Editor: An outside editor will be sourced and retained for the editing of the final document(s)

Graphic design: CLI can utilize internal graphic design assistance or utilize the Moorings Park graphic designer

Deliverables
Your goal is to create a "capstone project" that will ensure the on-going and consistent operational excellence that you have established at Moorings Park.

The features of the project will include a digital delivery of information and/or training available to all partners via iPads and other devices, as well as traditional classroom training.

As we develop and talk more, other ideas may arise that will help partners feel more ownership and want to become stakeholders and stewards of the Moorings Park Standards of Practice.

Create a Standards of Practice approach which may include:

- A handbook or Toolkit (or Standards of Practice Operators Manual).
- A virtual "hub" available to answer questions and provide detailed information on each topic listed.

The described Operators Manual shall be designed to address a myriad of topics among all departments. Its ease of use, particularly for quick referencing and overall functionality is dependent upon achieving the ideal balance between material content and brevity for the learner.

Further, the Operator's Manual is not intended to replace existing or future organizational policies. Such policies exist under different format and are recorded digitally in PowerDMS software. A good example where the Operator's Manual will bring great value occurs when a new supervisor or manager joins Moorings Park.
The Manual will present holistically, how Moorings Park conducts business in support of residents and in some instances, staff. It sets expectations and aligns business units under specific standards of practice.

They define quantifiable products and/or services that must be delivered upon the completion of a project. Deliverables are what's *in scope* and *out of scope.*

They help project managers to verify whether a project is on the right track and doesn't detour from the initial objectives.

Location of work and resources
The work is expected to be done remotely, with frequent calls, Teams, or Zoom meetings.

Assumptions and special requirements
At any time, CLI or Moorings Park can call for a review session to note any discrepancies or concerns.

Price and payment schedule

Discovery	**$24,000 (240 hours)**
Design	**$30,000.00 (based on 300 hours)**
Delivery	**$8,000 (based on 80 hours)**
(Addition al expenses invoiced separately: Graphic designer and outside editing)	
Total Fee	**$60,000**

Very often it mentions the maximum cost cap, so-called *not to exceed (NTE)* amount.

Invoice schedule

1. Invoice 1 November 1, 2022: $24,000
2. Invoice 2 January 2, 2023: $30,000.00
3. Invoice 3 May 15, 2023: $8,000.00

SEVERABILITY: If any provision of this Agreement shall be held to be invalid or unenforceable, such provision shall be stricken and the remainder of the Agreement shall remain in full force and effect to accomplish the intent and purpose of the parties. The parties agree to negotiate the severed provision to bring the same within the applicable legal requirements to the extent possible.

DISPUTES: Any dispute, controversy or claim arising out of or in connection with this Agreement, including without limitation, any dispute regarding the enforceability of any provision, that cannot be resolved through good faith negotiations within thirty (30) days or such longer period of time as may be mutually agreed between the Parties, shall be submitted to and finally resolved by a court of competent jurisdiction in DuPage County, Illinois.

Signatures of both parties

I understand that the electronic signature below shall have the same legal effect as if written manually. I agree to the above terms.

CLI: *Susan Cain, Ed.D., LCSW*	**Moorings Park:**
Date: 10/07/2022	**Date:**