



Memorandum

To: University of Nebraska / Jeffrey P. Gold, MD, President
From: CFAR / Jennifer Tomasik, Vice President & Principal
Date: June 16, 2025
Subject: Proposal A: Supporting a 360-Degree Assessment Process

It was a pleasure speaking with you yesterday to discuss my support in conducting a 360-Degree Assessment Process for one of your campus Chancellors. This memo outlines our approach to the process and the professional fees associated with the effort.

As I understand it, you would like to get started right away, hoping to complete the work by mid-August. Once you've had a chance to review the proposal, let's discuss how best to get started.

I am excited to be your partner in this important work!

CFAR's Approach

CFAR's 360-degree assessment process is designed to identify and build upon a leader's strengths, while noting and addressing opportunities for positive change in a leader's skills and behavior. Generally speaking, CFAR's 360, sometimes called a multi-rater feedback process, is a constructive interview methodology in which a leader receives confidential feedback from people in the "circle" immediately surrounding them—individuals with whom the leader connects regularly: those who report to the leader, colleagues, peers, the individual to whom the leader may report, and sometimes students, faculty, vendors, clients, and trustees.

Typically, CFAR uses an "in-person" interview process where possible (literally in person, or by telephone or Zoom). What may be unusual, and most appreciated, about CFAR's approach is that it starts with a macro view of the institution's culture to provide us with the context in which the leader works. This helps to "warm up" the interviewees by providing an opportunity to talk about themselves and the work environment before directly asking questions about the leader being assessed. You have already said that you can help me establish some of the context—including current and future state—in advance of the interviews, which will be extremely useful.

CFAR's 360-degree assessment allows leaders to understand how their effectiveness is viewed or experienced by others, as well as provides specific feedback about gaps to fill or skills needed to enable future success. The most effective 360s provide feedback based on behaviors that others can see and experience. The outcome is a document that summarizes the interviews, which summarizes and interprets the findings. A 360-degree assessment process can also serve as a roadmap for executive coaching, should that be of interest.

Proposed Plan of Work, Results, and Timeline

As discussed, this engagement will include the following elements:



- Comprehensive, interview-based, 360-degree feedback—including 45-minute, structured interviews for roughly twelve to fifteen people for the Chancellor
- Analysis and feedback summary for the Chancellor
- Individual feedback debrief session with President Gold
- Process management by CFAR Consultant

I propose we meet as soon as possible to get underway, knowing that you would like to complete the effort by mid-August. In our first meeting, we can identify the list of interviewees, generate the final set of questions to include in the assessment, agree on the communication and framing with participants, and prepare to launch the effort. There is a lot to do in a short timeframe, so I propose the following timeline and steps to keep us on track:

Week of June 2

- Complete the contract
- Conduct a launch meeting with President Gold to identify interviewees and sharpen questions for the feedback process
- Communicate with interviewees to schedule their interviews

Week of June 9

- Prepare for interviews
- Finalize scheduling
- Note: If possible, in-person interviews can be quite powerful. I am prepared to come on-site on June 18 and 19 to host interviews if that works out logistically for the interviewees. I understand that this may mean traveling to two different campuses, but we can discuss what's possible and whether we can get enough people scheduled on those days to make the visit worthwhile. I can complete the additional interviews via Zoom.

Weeks of June 16 – June 30

- Conduct interviews

Weeks of July 7 and 14

- Analyze findings
- Prepare draft 360 feedback report

Week of July 21 or 28

- Preview draft report with President Gold
- Make revisions and finalize report

This timeline is aggressive, but it does give us a little wiggle room to go into August if necessary.



About CFAR and the CFAR Team

CFAR is proud to deliver our management consulting services to clients, with a commitment to unleashing potential and maximizing impact. We have, for more than three decades, provided guidance and expertise to tackle the thorniest issues—ones often rooted in a misalignment between important organizational goals and individual beliefs about what it will take to achieve them. We come to our work as curious problem-solvers. Our heritage as the Wharton School's only multi-disciplinary, applied research center lives on in our continued dedication to advising leaders on complex organizational issues where both people and performance matter.

CFAR's mission is to help leaders activate organizations to achieve their highest aspirations—productively, meaningfully, profitably, and with impact.

We take a multidisciplinary, systemic approach to consulting and coaching engagements, drawing on a seasoned team of experienced consultants from a variety of disciplines and with a broad range of training, credentials, and capabilities. The contribution of multiple perspectives is paramount in advancing the kinds of customized work for which we are known. Our experience shows us that drawing in multiple perspective—and creating excitement and a sense of ownership—creates the conditions for sustainable, lasting success.

Our clients lead organizations where mission and purpose are central and engagement and alignment matter—in healthcare, family enterprises, owner-led businesses, higher education, foundations, associations, and other corporate and non-profit entities. Together, we partner to first discover (sometimes hidden) obstacles to success and then break through them using research-based ideas, tools, and approaches. Ultimately, our work aligns strategy, strengthens culture, builds teams, and improves outcomes.

Our commitment to you is to ensure:

- Your world is understood.
- Your choices are clarified.
- Your organization is activated.
- Your purpose is realized.

Forbes has named CFAR as one of America's top management consulting firms. We serve clients from our offices in Philadelphia and Boston and through a network of coaches and colleagues from across the US and the world.

The CFAR Team

Jennifer Tomasik, CFAR Vice President and Principal, will lead this effort, drawing on her experience with the University of Nebraska system. CFAR Associate Connor Champigny will provide project and scheduling support.

Costs and Benefits

The scope of work outlined in this proposal is offered at a fixed fee of \$15,000. Our standard 5% fee to cover other administrative expenses incurred in our work with you is included in the fixed fee. Direct expenses, such as travel, are billed separately at the time they are incurred.



CFAR requires an initial payment of \$5,000. The remaining balance of \$10,000 will be billed upon completion of the work. Direct travel expenses (if any) will be included in the final invoice.

Any additions to the scope of work will result in additional fees at CFAR's standard rates for those services at the time such additional work is to be performed. CFAR will contact you for approval prior to any such additions to the scope of work.

Benefits

Through this work, you will have captured and made sense of the input from 15 people who can offer their perspectives about where the Chancellor is shining and where meaningful improvement is needed. Additionally, and perhaps most importantly, this effort will help to inform your thinking about how best to utilize their skills and talents as the future of the University is being reimagined.



Terms and Conditions for CFAR's Work with the University of Nebraska

The following sets out CFAR's terms and conditions for work between CFAR (The Center for Applied Research, Inc.) [we, us, our] and the University of Nebraska [you, your] for services to be performed by CFAR. When you accept a proposal from CFAR for work on a project, these terms and conditions become part of the agreement between you and CFAR. Unless expressly referred to as being modified by the proposal, these terms and conditions control and will take precedence over the terms of the proposal in the event of any conflicting language.

Costs

CFAR offers this contract at a fixed price of \$15,000 for professional fees required to deliver the scope of work outlined in this proposal. Direct travel expenses are billed in addition to professional fees and included in each invoice. Our standard 5% fee to cover other administrative expenses incurred in our work with you is included in the fixed fee.

Any additions to the scope of work will result in additional fees at our standard rates for those services at the time such additional work is to be performed. CFAR will contact you for approval prior to any such additions to the scope of work.

CFAR requires an initial payment of \$5,000 upon acceptance of this proposal. The remaining balance of \$10,000 will be billed upon completion of the work. Direct travel expenses will be included in the final invoice.

All monthly bills will be due upon presentation, and any bill unpaid for a period of thirty (30) days may accrue interest at the rate stated in the invoice. Of course, we will be pleased to discuss any questions you have about the bill. Because of the nature of the work, we request that you raise any questions about a bill within ten days of its receipt. If you do not do so, we will assume the charges are satisfactory to you, and CFAR will continue to perform work on your project accordingly.

Our fee structure reflects CFAR's practice to limit its liability to the amount of fees on projects. Thus, if any claim is brought against us arising out of the work we do for you, you agree our liability is limited in all respects to the fees actually paid to us by you during the preceding 12 months of the project.

Information You Provide Us

During the course of this project we will be obtaining written and oral information from you in order to perform our work. We will treat your business information as confidential, using the same degree of care we use to protect and safeguard our own proprietary and confidential information. However, because of CFAR's unique history and close affiliation with the business academic community, CFAR does reserve the right to publish based on client projects. In any such publication, we will not specifically identify you or your employees or disclose any written information that you provide us stamped as "confidential" without your consent. By accepting these terms and conditions, however, you do give us permission to refer to you generally on the CFAR website and in other CFAR promotional materials as a CFAR client. With respect to the



confidential documents you provide us, we will limit access to those documents to those individuals working for or supervised by CFAR on the project. When we finish work on the project, we will return or destroy all confidential information then in CFAR's possession.

In the course of our work, CFAR also may conduct interviews with certain individuals or entities. In order to encourage full disclosure for your ultimate benefit, CFAR will assure such individuals or entities that information provided by them will be kept confidential to the extent allowed by law or will be presented in a manner that will not specifically identify the provider of the information. Information disclosed to CFAR in these circumstances is proprietary to CFAR and will not be disclosed to you.

Our Information, Processes, and Methodologies

CFAR's methodologies, research and analysis tools, processes, data, know-how materials, and computer programs (whether copyrighted or not) have been developed over a substantial period of time and at some expense and are considered to be our trade secrets. When CFAR uses any of this proprietary information in connection with your project, this use does not create any rights in you to use such items independently of CFAR and does not limit CFAR's rights in such proprietary information in any manner, including use in connection with CFAR's work for other clients.

Deliverables

Any report we prepare for you under this proposal is your property solely for your own internal use. While we will not distribute such reports without your permission, consistent with our right to publish and the development of our body of knowledge about organizations generally, CFAR will use such reports for its own internal purposes and as the basis for publication and work for other clients, consistent with our agreement regarding confidentiality.



This proposal is an offering by CFAR, valid until June 30, 2025. Upon acceptance of these terms, our accounting office will follow up with an executable copy via DocuSign.

Please mail your initial payment of \$5,000, payable to Center for Applied Research, Inc., to 1700 Market Street, Suite 2140, Philadelphia, PA 19103, Attn: Mary Kelly. For additional payment options please contact Mary Kelly, Chief Financial Officer, at mkelly@cfar.com.

For CFAR:

[Redacted Signature]

Carey Gallagher, Principal

06/16/2025

Date

For the University of Nebraska:

[Redacted Signature]

Doug Carlson

6/16/2025 | 9:56 AM CDT

Date