



PARTNERING TO MAKE YOUR VISION A REALITY:
Working with Leaders in Education

Proposal for Services

Milpitas Unified School District

May 31, 2017

PROPOSAL SUBMITTED BY:



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TABLE OF CONTENTS

Introduction and Executive Summary Letter.....3

Project Approach.....4

Firm Qualifications and Experience.....6

Team Qualifications and Experience.....11

Cost Proposal.....13



May 31, 2017

Cheryl Jordan
Superintendent
Milpitas Unified School District
1331 E. Calaveras Blvd.
Milpitas, CA 95035

Dear Superintendent:

Thank you for providing Voler Strategic Advisors with the opportunity to present the Milpitas Unified School District with a proposal for services.

We appreciate the due diligence of your efforts to engage a diverse set of stakeholders and the application of different approaches to collect information. For the proposed work, we intend to leverage our extensive experience in the educational sector, and evaluation expertise to inform and produce your District's strategic plan

We look forward to the opportunity to becoming a partner in this process.

Respectfully,

A handwritten signature in black ink, appearing to be "R. Bonilla".

Rolando Bonilla
Chief Strategy Officer

Project Approach

Scope of Work

In developing a strategic plan for the Milpitas Unified School District, Volar Strategic Advisors will undertake a three-pronged approach that will consist of the following:

1. Analyze Current Data
2. Facilitate Three Community Meetings
3. Develop Strategic Plan/Report

Analyze Current Data

Milpitas Unified School District has advanced multiple efforts to collect information from a diverse set of stakeholders, inclusive of students, parents, staff and community members.

- Earlier this year, the 2017 LCAP Stakeholder Input/Thought Exchange process generated a wealth of ideas and feedback from 768 people, representing over 1,701 thoughts. This approach revealed many themes and areas of interest while leveraging an online platform.

Volar Strategic Advisors will analyze and further synthesize current data in order to inform a strategic discussion at the community meetings, which will contribute to the strategic plan/report.

Facilitate Three Community Meetings

In addition to the online process of collecting information, Milpitas Unified School District recognizes the value of creating face-to-face opportunities to engage the community in the strategic plan development process.

- With this in mind, in-person, community meetings are intended to symbolically and proactively “open the doors” to those individuals who may not have been able to participate in the online process, as well as engage those individuals who want to further participate in a community forum.

Volar Strategic Advisors will facilitate three community meetings to be held in July, August, and September. The outcome of the August 7th Convening for Envisioning the Future Life of a MUSD Student will be included in the development of the strategic plan.

- The community meetings will include a mix of open- and more close-ended questions to promote contributions, as well as strategically elevate and rally around specific areas for action across the District.

Our goal will be to move beyond themes. As an example, the LCAP identified “curriculum and programming” as the number 1 theme for current concerns with some comments about the importance of strengthening science education.

Develop Strategic Plan/Report

Voler Strategic Advisors will produce a strategic plan/report that synthesizes the richness and volume of information from the different stakeholder engagements, and provides specific strategies and recommendations for District-wide action.

The strategic plan/report will be produced in a visually and content-accessible format to promote the democratization of data, as well as ensure the success of its adoption and support.

The report will be completed no later than September 30, 2017.

Firm Qualifications and Experience

Voler Strategic Advisors (Voler SA) is the proposer. The primary contact is Rolando Bonilla, Chief Strategy Officer. His contact information is as follows:

84 West Santa Clara Street, Suite 760 | San Jose, CA 95113
Office: (408) 606-3460, Extension 703 | Mobile: (415) 987-8025 | Website: www.volersa.com
Rolando.bonilla@volersa.com

Voler Strategic Advisors is a full-service management consulting firm that specializes in problem solving and driving forward-thinking and results-oriented strategies and solutions to help our clients achieve their objectives.

We pride ourselves in being out-of-the box thinkers and doers, who are client-centered and results-oriented. We leverage our team's intellectual capital to help clients build capacity, facilitate change, and achieve short- and long-term goals.

Voler Strategic Advisors is a woman- and minority-owned company, certified by the Women's Business Enterprise National Council (WBENC), National Minority Supplier Development Council (NMSDC), and State of California.

- We recognize the commitment to supplier diversity that is embraced by corporations and government agencies, and we can add diversity to your supply chain.



We serve educational institutions, businesses, government agencies, health care organizations, and non-profits.

Our philosophy is guided by three core principles or values:

1. **CLIENT-CENTERED:** By developing a deep understanding of your mission, objectives and strengths, we develop strategies that bring out the best in you.
 2. **FORWARD-THINKING:** Through innovative thinking and implementation of best practices, our experts will partner with you to achieve transformational outcomes.
 3. **RESULTS-DRIVEN:** We leverage our rich experience and expertise to help you reach your destination. Expanding your impact is our top priority.
-

Our over-arching goal is to establish a partnership with our clients in order accelerate the progress they seek. Each client is unique, and our approach is deliberately client-centered and tailored to meet individual business needs and requirements.

We employ a collaborative process to identify goals, pinpoint priorities, as well as reveal challenges and opportunities. This information facilitates understanding and enables us to develop a strategy for resourcing and maximizing our team's expertise and experience.

Our rich portfolio demonstrates our expertise and experience in various areas. Relevant to the proposed work are the following:

- **Communications:** *Communicating to advance your organization's objectives*

Voler Strategic Advisors specializes in designing clear, powerful messages and shaping issues to capture the intrigue of the public and targeted media outlets. We strategically position our clients and their issues within the context of each story, viewing every media contact and exposure as an opportunity to build positive momentum and reinforce messaging leading up to critical decisions and deadlines.

With established relationships in media, Voler Strategic Advisors maximizes coverage for our clients, helping to promote their achievements and generate support for their objectives.

As communications experts, we specialize in the following areas to help our clients reach their target audience:

- Strategic communications planning and implementation
 - Crisis management
 - Development of compelling content
 - Media relations
 - PIO support
 - Social media
 - Coordination of press conferences and announcements
 - Spanish-language communications
 - Workshops and training in a variety of areas including media outreach, spokesperson training, and other topics
- **Community Relations:** *Reaching community, building partnerships, and establishing trust.*

Our experts at Voler Strategic Advisors work with a variety of public, private, and non-profit sector clients to facilitate community outreach. It is always important to connect directly with constituents and to create opportunities for on-going dialogue, collaboration and ultimately, partnership building.

By using the media, social media, direct communications, and public forums, we open up

multiple channels of communication to ensure local community leaders and residents receive accurate, timely information and that they feel they have a direct stake in our clients' success. Voler Strategic Advisors, with its wide network of community relationships in your region, can build the community support you need to reach your objectives.

- **Crisis Management:** *Addressing crisis situations strategically and with immediacy.*

In today's fast paced world of instant news and 24-hour news cycles, a lifetime of positive image building can be destroyed in seconds. The ability to quickly craft a strategic message and disseminate it to the appropriate outlets can help mitigate a potential disaster and ensure that your perspective is heard.

Available 24 hours a day, 7 days a week in the event of a crisis, Voler Strategic Advisors will work with you to immediately assess any situation and develop a strategy that will protect your image and relationships with key stakeholders, as well as allow you the opportunity to move forward in a positive direction, as soon as possible.

Examples of our portfolio include:

- Managing reputational and public trust issues
 - Crisis strategy and on the ground support
 - Development of messaging and communications tools
 - Strategic engagement of the media and use of other communication channels
 - Coordination of press conferences
 - Spokesperson training and support
 - Post-crisis evaluation and planning
- **Government Relations:** *Navigating through the political process and creating support for your objectives.*

When proposing an idea that requires the approval of a government body, it is critical to understand the regulatory process, and equally important, the political climate of the moment.

With extensive experience in the government sector, Voler's professionals can assist you by developing a strategy that will allow you the opportunity to navigate through the complex landscape of government regulations and politics.

Examples of government relations efforts:

- Analysis of current regulations and political climate
- Development of appropriate strategy for a specific government body
- Develop advocacy packets for government bodies
- Coalition building
- Connecting stakeholders to decision-makers

- **Marketing:** *Enhancing your brand identity and growing market share.*

Having a strong brand identity makes a world of difference in today's highly competitive environment. What differentiates your organization from your competition? What is your value proposition? Our professionals have the experience to best position you to compete for market share.

Our experts will develop strategies to help you better reach and connect with your target audiences through brand awareness and market education. Our services include:

- Brand identity development, including logo design
- Focus groups
- Production of viral videos
- Digital campaigns
- Media campaigns
- Social media strategies
- Development and design of communications tools
- Website design

- **Public Relations:** *Advancing and managing a public image, brand, and relationships.*

At Voler, our team of professionals has extensive experience in a wide variety of public relationships roles, having worked in the media and in front of the media as crisis strategists and spokespeople, leading the charge on high-profile public projects and the development of strong stakeholder relationships.

In the simplest of terms, our public relations experts are image shapers that analyze organizations for their strengths to develop positive stories, address areas of reputational risk, and build partnerships that advance organizational goals.

Examples of public relations efforts:

- Development of communications strategy
- Message development
- Media kits
- Story placement
- Press conferences
- Community outreach
- Coalition building
- Coordination of special events
- Crisis management
- Market research
- Social media campaigns

- **Social Media:** *Engaging communities and stakeholders using the latest social media platforms and technologies.*

Social media has revolutionized the way we communicate and engage with communities. We now have a readily accessible medium to get information out immediately and cost-efficiently to customers and stakeholders. In turn, individuals who are connected have a mechanism to provide immediate feedback.

Voler Strategic Advisors can help connect you with your target audience and attract new followers ready to join the conversation. We can also help build equity and trust with your constituents by providing an enhanced level of service and communication. Specific areas of support include:

- Developing strategies for reaching your target audience(s)
- Launch of social media platforms and campaigns
- Creating vibrant content
- 24-7 management of social media platforms
- Strategic posting and targeting
- Responding immediately to questions or requests from your followers
- Tracking and reporting metrics for improved engagement

Team Qualifications and Experience

Rolando Bonilla

Chief Strategy Officer

When it comes to leadership, communications and business strategy, Rolando Bonilla has a proven track record for helping organizations navigate the challenging world of politics, crisis, and reputation management. As Chief Strategy Officer at Voler Strategic Advisors and as a longtime media communications expert, Bonilla innately understands how to portray Voler's clients from a position of strength from which to make their case with clarity and conviction that will ultimately help push their agenda forward.

As a long-time public servant, Rolando Bonilla has had the privilege of serving two of the Bay Area's largest cities — the City and County of San Francisco and the City of San Jose.

In San Francisco, Bonilla served on various City Commissions, including the City's Juvenile Probation Commission, where after being appointed by Mayor Willie L. Brown, Jr., Bonilla served as the Commission's Finance Committee Chairman, overseeing the department's \$33 million annual budget. During his time working in San Francisco politics, Bonilla worked with some of the biggest names in California politics today, from Lt. Governor Gavin Newsom to Attorney General Kamala Harris, witnessing their rise from local politicians to statewide leaders.

After serving in San Francisco, Bonilla traveled to the South Bay to work in the office of then-San Jose City Councilmember Nora Campos as her communications director, where he crafted a strong media narrative to align and strengthen Campos' political agenda and raise her citywide profile. During this time, Bonilla positioned Campos as a political force in San Jose, a status that allowed the then-Councilmember to make public safety the City's top priority and secure millions of dollars to help bolster the police department ranks and quell gang violence plaguing the city's most underserved neighborhoods.

Bonilla received a BA in political science from the University of San Francisco, a JD from San Francisco Law School, and is licensed by the State of California in the sale of real estate.

Perla A. Rodriguez

Chief Executive Officer

With over 18 years of high-level corporate leadership experience, Perla A. Rodriguez has assembled a phenomenal team of professionals, trained by the best universities around the world. Together with her team members, distinguished leaders in their fields, Voler Strategic Advisors are providing innovative strategies and solutions to help clients achieve their objectives.

Well-known throughout corporate and media circles for her broad range of expertise and high level of professionalism, Rodriguez has worked for many of the biggest brands beyond the region, including Intel, Univision, PG&E, and the Public Policy Institute of California.

Previously, Rodriguez served as the Vice President of Public Affairs for Mi Pueblo Foods, where she was instrumental in building the company's first ever public affairs department. She and her department were critical in earning the political and grassroots support to fuel the company's rapid expansion from 10 to 21 locations throughout Northern California within a two-year period. Under her leadership, Mi Pueblo created innovative philanthropic programs that engaged thousands of customers and invested over two million dollars benefitting students, families and numerous nonprofit organizations.

Among her many accomplishments, Rodriguez has been recognized by her peers as a leader in the public relations industry. In 2011, she was recognized by the Silicon Valley Business Journal as one of the 100 most influential women in the Silicon Valley and by the National Grocer's Association for developing the "Best Public Service" campaign in the supermarket industry. In 2005, while working as a Community Affairs Manager for Univision 14, she was nominated for an Emmy Award as executive producer of the "Exito Escolar" education program.

Rodriguez holds a BA in international relations from Stanford University and an MPA from the University of San Francisco, with an emphasis in Health Services Administration.

Fátima M. Rodríguez

Senior Vice President

Fátima M. Rodríguez is Senior Vice President, Diversity Policy and System Transformation at Voler Strategic Advisors. In this capacity, she is leading consultative efforts that enable responsive, patient/client-centered systems and innovative models of care and service delivery.

She is a change agent and passionate about bringing her experience forward to create a more seamless, consumer-centric system of care that promotes patient-family-community engagement and empowerment.

Fátima M. Rodriguez earned a Bachelor's of Arts degree with Honors from the Program in Human Biology at Stanford University and a Master's degree in Public Health from the Community Health Sciences Program at University of California, Los Angeles. Fátima completed her doctoral studies at the School of Public Health at University of California, Berkeley. She has advanced training in global migration and health equity, such as from the Disparities Leadership Program, Disparities Solutions Center at Massachusetts General Hospital and Harvard University School of Medicine; University of California, Berkeley; and the European Union Public Health Association.

Cost Proposal

Voler Strategic Advisors has developed a Project Approach that addresses the activities identified in the Scope of Work.

Fee Structure

Total project cost: **\$7,500**

1st Payment of **\$3,750** to be invoiced upon signing of the agreement.

Final payment of **\$3,750** to be invoiced upon completion of the report.

Duration of the Agreement

Report to be completed no later than September 2017.

If you agree with the above referenced terms, please sign and date below:

Cheryl Jordan, Superintendent
Milpitas Unified School District

Date