

## LOS ALTOS SCHOOL DISTRICT

### DRAFT Work Plan

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### Background

Los Altos School District (LASD) supports over 4,400 K-8 students through seven elementary schools and two junior high schools. LASD strives to ensure success for all students. This objective is evident in both the district's mission to "inspire a passion for learning and prepare all K-8 students to thrive in our rapidly changing global community" and the Local Control and Accountability Plan (LCAP), designed to further focus on district goals and accelerate the success of all students.

Accommodating student enrollment has been an ongoing challenge for LASD. With the acquisition of a tenth school site, leadership is in the process of determining the use of the site so as to optimize the district's ability to provide an equitable and excellent education for all students. The LASD Board of Trustees will make this determination with input from the Site Advisory Task Force, a team comprised of various stakeholders. The task force will analyze the benefits of several identified options for the site.

As LASD determines the best use of the newly acquired site, leadership is exploring opportunities to enhance communication with its stakeholders. Community engagement will also support the district to inform long term goals and other critical decisions in the future. Broad-based family, staff and community engagement using a transparent public process and independent facilitation will help the district to:

- Gather additional input that will further inform decision-making related to the new site
- Support the success of district LCAP goals, especially those of Goal 1: Meet the individual learning needs of all students and Goal 3: Engage staff, parents and community members as learning partners
- Build greater understanding of and empathy for the aspirations and challenges of the district as it continues to grow with changing demographics
- Provide opportunity for the district to share its narrative of change and deepen the engagement of families and community members in the design for the future
- Demonstrate commitment to providing open and responsive leadership

Aligning community priorities and establishing community confidence are always important as the district works to accomplish its mission and goals. These factors become even more critical after significant change and when the time comes to ask for your community's support for future planning. Effective community engagement provides valuable input into your planning processes and establishes confidence in district leadership and support for district decisions.

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### Goals We Can Accomplish Together

#### **AN INCREASE IN MEANINGFUL PARTICIPATION**

Increase the number of participants meaningfully contributing their ideas and priorities to your planning and decision-making processes. Participants learn from others by connecting with as many people as possible who cannot, or will not, attend face-to-face planning meetings. By providing an opportunity where all input is valued, you will hear from a greater representation of your organization. In this way, you will both broaden and deepen the dialogue with your participants.

#### **ACTIONABLE FEEDBACK AND ACCOUNTABILITY**

We provide the analytics and reports that allow you to draw meaning and insights from your Thoughtexchange results. These deliverables improve your ability to learn from and act on your engagement efforts by ensuring diverse participant opinions are considered and results are well understood by leadership and others. We also provide you with a means of sharing out the exchange results thereby enabling leadership to definitively demonstrate that they have listened to and have learned from the participants' input.

#### **BUILDING CONFIDENCE AND TRUST**

Providing a process that supports a dialogue with participants defined by accessibility, transparency, civility and collaborative learning. Our moderation team reviews all the thoughts in an Advanced exchange in collaboration with your team to ensure a safe process that stays on topic and aligns with your district values and expectations.

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### Proposed Approach to Stakeholder Engagement

We propose a multi-phase approach to uncover the needs and priorities related to your planning initiatives and critical decision-making processes. Multiple district-wide exchanges will build cumulatively to educate and engage the community while building community confidence and support for district decisions.

**NB: The exchanges will be revisited regularly to account for changes in your priorities for the duration of the engagement period.**

Type	Timeline	Objectives	Examples of Deliverables*
<u>Exchange 1</u>  Issue Based Engagement	Spring 2018	<ul style="list-style-type: none"> <li>Start the exchange with parents, staff, and community</li> <li>Identify participants' perceptions, values and priorities</li> <li>Help participants deepen their understanding of the challenges and complexities associated with ensuring equity and success for all students</li> <li>Further inform previous conversation and analysis related to the school site</li> <li>Lay the groundwork needed to ensure support for future decisions related to the new facility</li> </ul>	<ul style="list-style-type: none"> <li>Top Thoughts Report</li> <li>Interest Analysis</li> <li>Heat Map for demographic analysis</li> <li>Results and Insights Report</li> </ul>
<u>Exchange 2</u>  LCAP Exchange	TBD	<ul style="list-style-type: none"> <li>Enhance LCAP/ Educational Blueprint consultations by including more staff, students, parents and community members in the process</li> <li>Identify participants' issues and priorities</li> <li>Monitor stakeholder satisfaction, district and school climates</li> <li>Use results to monitor progress on district and school goals</li> <li>Celebrate successes</li> <li>Demonstrate ongoing commitment to responsive leadership</li> </ul>	<ul style="list-style-type: none"> <li>Top Thoughts Report</li> <li>Interest Analysis</li> <li>Heat Map for demographic analysis</li> <li>Strategic Analysis Activity to group thoughts into actionable categories</li> <li>Results and Insights Report</li> </ul>

\* Analysis and reports are customized to each exchange to account for the context, goals, and results of the exchange. As such, deliverables will vary for each exchange.

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## Potential Future Projects

### Annual LCAP/Educational Blueprint Exchanges

- Continue to reinforce the district's mission and the LCAP/Educational Blueprint goals
- Continue to monitor and assess district issues and LCAP/Educational Blueprint priorities and compare to previous results
- Gauge community alignment, learning and confidence in district plans

### Issue Based Discussion

A second Issue Based Discussion, such as one related to the concept to migrate from a Junior High School structure to Middle School structure, will

- support you to drill down into the issue to surface the community's understanding and priorities,
- Understand the priorities and concerns of parents, teachers, and students as they relate to these grade levels and the way that they are structured
- garner support for planning, and
- demonstrate to your stakeholders that leadership is committed to listening to and learning from the community.

### Staff Engagement

Gather input from staff related to an issue or conducted as a climate assessment to understand their perspectives and compare results to those of previous exchanges to monitor progress.

### Student Exchange

Gather input from students to understand their perspectives related to school climate and culture or to an issue such as programs and opportunities.

### Standard Exchanges

Through a self-directed and self-facilitated exchange, district and school leadership can gather diverse perspectives from their teams, departments and/or committees, and identify the common interests. Leaders can deepen their understanding of the priorities of participants on a range of topics and purposes. This is done with the training and support of our staff.

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### About Thoughtexchange

Thoughtexchange is a software-driven online process that engages stakeholders in a meaningful dialogue, which over time strengthens confidence and trust in district and school leadership. We offer two types of exchanges:

STANDARD	ADVANCED
Best for leaders making decisions affecting 15-150 stakeholders	Best for leaders driving highly visible system-wide communications
<b>Standard includes:</b> <ul style="list-style-type: none"><li>✓ Single-question exchanges</li><li>✓ Up to 150 participants per exchange</li><li>✓ Comprehensive training</li><li>✓ Fast and easy-to-use analytics</li><li>✓ Ongoing access to curriculum and resources</li><li>✓ Expert online and in-person support</li></ul>	<b>Advanced includes:</b> <ul style="list-style-type: none"><li>✓ Multi-question exchanges</li><li>✓ Unlimited participants per-exchange</li><li>✓ Dedicated facilitation</li><li>✓ Advanced data analysis and visualization</li><li>✓ Custom third-party moderation</li><li>✓ Customized and branded interface</li></ul>

Thoughtexchange can be used for some difficult but important tasks. Standard and Advanced Exchanges combine the ability to ask open-ended questions in a streamlined process with the promise that every thought will be considered. Both types of exchanges create confidential forums that let people freely express thoughts without any changes or censorship.

Standard exchanges support board and school leaders to engage with small groups within their school community and the board. With a participant experience that is the same as with Advanced exchanges, leaders can hear the perspectives and priorities of participants on a range of topics and for a variety of purposes. The full training package includes hand-on training on our software, individualized coaching on question design and best practices, resources for continued learning, and direct access to our support team.

Advanced is a full-service solution for broad community wide engagements handling the logistics of thousands of people and managing the resulting tens of thousands of thoughts. Advanced exchanges can have multiple questions with demographic data, and include moderation to protect the people participating, analysis to consolidate the data and custom reports to highlight key insights.

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## Our Approaches to Stakeholder Engagement

### **BROAD BASED ENGAGEMENT**

This approach is a system-wide consultation to engage parents, community members, staff, senior administration and board members in a dialogue about education at the individual school and district levels. These processes seek input on general areas of strength and concerns. This will demonstrate your commitment to listening and learning and will begin to align community needs and priorities with your planning efforts.

Exchanges such as the following are best supported by this approach:

- Strategic Planning
- Annual School/District Improvement Planning
- Beginning of the year 'Join the Conversation'
- End-of-Year Review
- School Culture/Climate Assessment

### **ISSUE BASED DISCUSSION**

This approach is based on a critical issue, possibly distilled from a topical issue or one emerging from the earlier exchanges. It will serve to build further trust and confidence and will demonstrate to the community members how their input is being acknowledged and influencing the process.

This approach helps you to address issues such as:

- Student Engagement
- School Calendars and Start Times
- Student and Staff Safety and Security
- Quality of Instruction
- Teacher Workload & Efficacy Review
- School and District Communication
- Curriculum and Program Review
- Student Transportation

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#### **PROPOSAL EXPLORATION**

This approach is used to gather input on a specific initiative, a plan in development, or a proposal you are considering. It can be initiated as a district-wide exchange or only involve a segment of your community. This approach will help participants to learn about your proposal and help you to understand your community's questions, concerns and priorities. It will help you to create effective messaging around the proposal and to make needed changes. Like the issue based discussion, it serves to demonstrate how community concerns and priorities are being acknowledged and will build buy-in and capacity for your planning initiatives.

This approach helps you to explore proposals such as:

- Facilities
- Technology
- Budget

#### **SCENARIOS ENGAGEMENT**

Based on findings of your staff, planning committee members and possibly prior input, two scenarios will be developed to specifically address an area of concern such as facilities planning or boundary redesign. These scenarios will be created to ensure participants can best understand the needs of the district and the opinions of one another.

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### **Thoughtexchange Advanced Overview**

#### **THE TEAM DEDICATED TO YOUR ENGAGEMENTS**

Throughout the length of your contract you will be supported by:

- Account Executives - Shannon Terrell
- Account Managers - Tristan Read
- Senior Engagement Consultants - Ann Skelcher
- Professional Services Manager - project facilitation and coordination of your project
- Moderation team – according to pre-determined criteria, set in collaboration with you, the team ensures that participant thoughts are on topic and safe for public viewing
- Technical Support, Data Analysis and Website Development teams

#### **CONSULTATIVE PROCESS DESIGN**

Our team will work with your staff to fully understand the desired outcomes for your district, the goals of leadership, and the experience you want for your participants. We take these to our Data Analysis and Visualization team who work with us to design the process and the questions. Together our teams ensure that we create the data and provide the analysis that will help the district deeply appreciate the dynamics around each of their goals, and to help leadership make the best possible decision.

We will help you create public messaging and a plan to target specific stakeholders and to distribute invitations through email, advertising, newsletters and websites. This process is designed and implemented to ensure minimal impact on the workload on your staff.

#### **PARTICIPATION**

We will involve stakeholders in an experiential learning process that involves 3 steps: Share, Star and Discover. The entire 3-step process is inclusive, fair and informative. You can expect to generate tens of thousands of thoughts, and see hundreds of thousands of stars assigned to the priorities valued most.

We facilitate the process eliminating the organizational and political challenges often associated with social media and online forums. Each exchange is hosted on Thoughtexchange servers and facilitated by our staff. This is done in alignment with your staff to ensure participants are encouraged to contribute at the individual school level.

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SHARE

Where **they answer**  
two or three open  
ended questions.

In the Share step, participants are asked two or three open-ended questions, such as “what do you appreciate?” and “what are your concerns?” either generally or about a particular issue or scenario.

Each participant can provide more than one thought in response to each question.

With Thoughtexchange a few questions will generate tens of thousands of thoughts and dozens of themes.

2

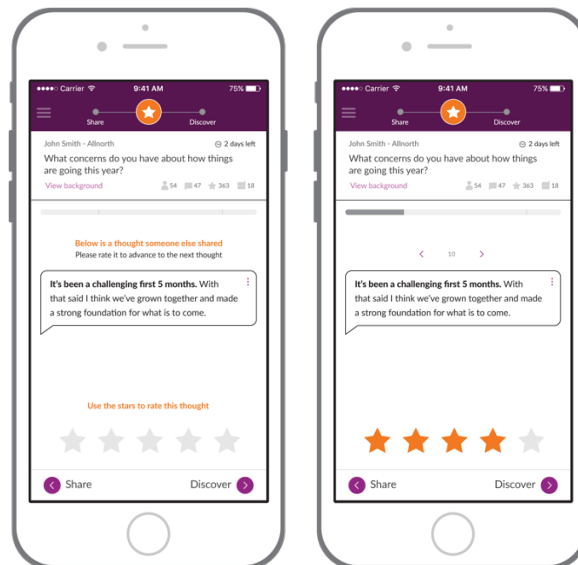


STAR

Where **they review**  
ideas from other  
participants and put  
stars next to the ideas  
they like best.

In the Star step, participants are shown the thoughts of other participants, and are asked to assign stars to show how much value they place on those thoughts.

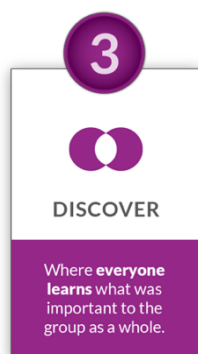
By considering the perspectives of a diverse range of stakeholders, participants learn from each other, and potentially shift priorities. This step allows the most valuable thoughts, and not the most common thoughts, to surface. This is how we accomplish group learning.



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Discover steps first include an opportunity for leadership to view interactive reports that show the results of the exchange. You will see the themes that emerged and even drill down to the individual thoughts submitted to see which thoughts were most valued by the participants.

We then provide further insights into these results through other reports and visualizations and ensure that the goals of the exchange are fully met.

Subsequently, we build a custom website or other graphic that communicates this learning to your participants. We can provide additional sharing tools as well, such as reports and videos.

The Discover step builds certainty and relatedness with participants through the transparent sharing of appropriate results.

### ADVANCED DATA ANALYSIS & VISUALIZATION

The Discover step contains powerful information for your leadership team. It surfaces concerns and priorities, and just as importantly, it enables you to communicate with stakeholders using the language of the community.

We provide a password protected dashboard to help you explore the results and inform organizational learning and action-planning. Dashboards may include:

- Top Thoughts Report – shows the thoughts prioritized by the average number of stars assigned from participants
- Interactive Bar Charts – a visual display of the themes and sub-themes within the results that also allows you to drill down into the thoughts within those themes
- Heat Map – demographic analysis related to roles, satisfaction or location and to examine the level of interest each group has in each theme
- Interest Analysis – a report that identifies different interest groups, highlighting the thoughts that divide them and the thoughts that unite them
- Strategic Analysis Activity and report – a tool for you or your team to group your top thoughts into actionable categories such as “requires long-term strategy and resources”, and/or “needs enhanced communication”, etc.
- Shift Analysis – a report showing the shift in perspectives between the share and star steps as participants learn from each other
- Year on Year Analysis – an interactive bar chart comparing results from year to year

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#### **CUSTOM REPORTS**

Results Website – a custom branded website to share the exchange results at varying levels, and to share your leadership’s perspectives on the results

Results and Insights Report – this summary report consolidates and further organizes the data into a shareable report to inform organizational learning and action planning

#### **CUSTOMER SUCCESS**

Our Customer Success Team will check in with you periodically to see if you need further assistance as you work with your results. We will also ask if there is anything we can do to improve upon our work as you move forward with future exchanges. It is our goal to ensure that you are completely satisfied with all aspects of your engagement work.

#### **Software Licensing**

To minimize the impact on your IT infrastructure and personnel, we manage and host your initial stakeholder exchanges as a turnkey solution. Included in your contract is a license to our software, which along with comprehensive support, allows your personnel to directly manage subsequent exchanges.

Thoughtexchange is cost-effective and becomes more efficient as staff members become proficient with our user-friendly tools and methodology. We offer a coaching program for any staff members who wish to learn how to use Thoughtexchange.

You will have Thoughtexchange as an established engagement system, allowing additional future initiatives.

#### **Ongoing Service & Support**

As needs arise we are happy to provide you with ongoing support and service. Comprehensive facilitation, and basic phone and email support are included with your licensing. Additional custom facilitation and professional services can be contracted separately in the future to address specific challenges if required.

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### The Thoughtexchange Difference

#### **NO LOGINS OR PASSWORDS**

Our unique email-based participation technology ensures fair and inclusive participation and does not bias towards those most comfortable with social networking and technology.

#### **CONVENIENT PARTICIPATION**

Unlike town-hall meetings, our simple online process results in unprecedented numbers of participants, including the “silent majority”, who contribute ideas and priorities at a time that is convenient for them.

#### **ACTIONABLE INFORMATION**

Rather than just showing you are “listening” to stakeholders via social media/survey tools, Thoughtexchange produces qualitative data organized and prioritized by many stakeholders. Each exchange results in a platform for learning, decision-making, positioning and project implementation. Appropriate results are shared with the entire community. When using an Advanced Exchange, we provide in depth analysis to decision leaders.

#### **ADVANCED - FULL-SERVICE**

Advanced blends powerful software with a full-service approach that includes project management, communications support, facilitation, moderation, graphic design, website creation, analysis, meeting facilitation, engagement consulting and more.

#### **CAPACITY DEVELOPMENT**

Our solutions and powerful software will allow your leaders to earn support and inform decisions on a more regular basis, which will enhance the overall performance of your district, and increase confidence and relatedness for your stakeholders.

## Price Quote



**Los Altos Elementary School District**

February 22, 2018

To: Jeffrey Baier

3 Year - Annual Thoughtexchange Services Subscription

Item	Annual Price*
Thoughtexchange Advanced Software and Services **	
Unlimited exchanges with a maximum of 1 exchange at a time	\$20,000
Initial Setup Fee (first year only)	\$3,000
5 Thoughtexchange Leader (Standard) Licenses (\$5,000 value)**	Included
Total	\$23,000

\*Subscription agreement must be accepted by 15-Mar-18 for this pricing

A 10% Discount is available if the full amount is invoiced upon acceptance:

\$56,700

Or you will be invoiced annually on the anniversary of your initial invoice:

2018	\$23,000
2019	\$20,000
2020	\$20,000

Thoughtexchange, Fulcrum Management Solutions Ltd.  
1145 Lakeview Dr., Box 2260 Rossland, BC, Canada V0G 1Y0

Shannon Terrell, Account Executive  
800.361.9027 x 256 | 604-762-5296  
shannon.terrel@thoughtexchange.com



Upon verbal acceptance of this quote we will prepare an agreement that will outline the services you are purchasing and the price to be paid.

Thoughtexchange is provided on an annual basis. Your subscription to our services is automatically renewed each year unless you provide us with a notice of cancellation. The year term provided on the front page in the title is a price guarantee period. We will not change your price for these services for that period of time. At the end of that period if we want to change our pricing we will provide you with at least two months' notice prior to your cancellation period.

At any time you can request more Thoughtexchange services by discussing with your Account Manager. Your Account Manager will be assigned to you once we have your agreement to move forward. We would provide you with a quote for the new services (either formally or at least verbally) and then would create an agreement document to add these services for the agreed price.

This quote includes the following services:

**\*\* Thoughtexchange Professional Services includes:**

- Email and phone support
- Coaching for Leaders for Standard Exchange creation
- Online access to help and resources
- Advanced Exchange Facilitation by our staff on behalf of your licensed Leaders
- Support for 1 simultaneous Advanced Exchanges
- Engagement consulting
- Moderation for Advanced Exchanges
- Theming for Advanced Exchanges
- Custom reports and presentations for Advanced Exchanges

**\*\* Thoughtexchange Software includes:**

- 5 Leader Licences
- Unlimited Standard Exchanges can be created by a Leader
- Max 150 Participants per Standard Exchange
- Multi language for Standard Exchanges
- Standard Analytics and Data Visualization
- Hosting of all runtime software and data, data backups, software upgrades
- 24x7 system availability
- Unlimited Participants per Advanced Exchange
- Multiple Questions for Advanced Exchanges
- Demographic Questions for Advanced Exchanges
- Multi language for Advanced Exchanges
- Advanced analytics and visualizations
- Customer Branding