Orgametrics® by Infinity Systems

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Mountain View Whisman School District

Empowering Leaders. Aligning Organizations. Driving Results.

Proposal for Mountain View Whisman School District (MVWSD)
Alignment and Business Development Model

This document is a proposal for Infinity Systems to serve Mountain View Whisman School District in their efforts to gain greater Alignment within their organization. This document outlines a plan for deploying the Orgametrics® Process. The Orgametrics® survey is the first step on the Alignment Journey: measuring alignment and providing recommendations for leadership development and alignment support strategies for MVWSD Leaders. Development and Support for MVWSD Leaders will also be outlined in this proposal covering a 18-month time period.

Who We Are

Infinity Systems is a team of leaders, dedicated to supporting leaders. Our passion is to help you make real change and make the true purpose and Vision a reality in your organization. We have leadership experience in many sectors, including public and higher education, law enforcement and many private-sector companies, ranging from small business to Fortune 500 companies.

Based on our experience and success, we believe that people in common purpose, shared Vision, and operational excellence is at the heart of what makes organizations grow and thrive. In fact, we believe that organizations cannot turn their Mission and/or Strategic Plan into full reality without being aligned. Finally, we believe that empowering and developing leaders for greater Alignment is essential for any organization to succeed.

What We Do

We begin your Alignment Journey by developing relationships with you and your leaders. By learning what it is you are trying to achieve, we can better understand the needs of you as a leader and your team as the ones tasked with carrying out your Strategic Plan. We use our Orgametrics® Assessment tool, to provide you with insight into the current overall Alignment and in specific areas of your organization. This 21-item pulse survey identifies 9 critical elements of Alignment: *Mission & Vision, Leadership, Teamwork, Empowerment, Accountability, Development, Best Practices, Creativity, and Communication.* Scores in each of these scales are considered the components of Alignment and make up an organization's Orgametrics® Score.

We then use the results from the assessment to aid you and your leaders, at all levels of the organization in developing strategies, plans, and roadmaps that strengthen your leaders in their ability to cascade the message and ensure the actions of all employees are connected back to the mission, vision and strategic plan. As the connection to the plan is strengthened, you will see each initiative being carried out, leading to long-term success.

This is the Alignment Journey: we support your organization leaders and leadership teams throughout the Alignment journey and ensure long-term progress.

Why Alignment

Organizational Alignment is the degree to which an organization's actions and key performance metrics are connected to and making the Mission, Vision and Strategic Plan a reality. Aligned organizations bring the true purpose of their Mission, Vision and Strategic Plans to life. Conversely, organizations that have a lower degree of Alignment will not see their Mission, Vision, or Strategic Plan realized. Organizations all over the world devise intricate Strategic Plans, and countless employees work hard each day to achieve them, but all too often, they don't fully understand the plan or see how their work is contributing to it. And worse, their work may not even be contributing to the plan. In these cases, employees will be busy, but their efforts and the rewards they receive are not necessarily aligned with productive work.

This is the difference between Engagement and Alignment. When employees are busy, they may be engaged. They are present and working. But, unless their actions are rooted in the Purpose of the organization, there is a great deal of lost productivity and lack of true progress. In other words: *Alignment = Engagement + Purpose*

Many organizations mistakenly believe that because their Mission, Vision or Strategic Plan is built, people will surely understand and be on board. Unfortunately, this is not the case. From the Senior Leadership Team, out to the furthest reaches of the organization, the message (understanding and ownership of it) changes from one level to another. Even the slightest misunderstanding or misinterpretation leads to variation in how the plan is being carried out (or not). In most organizations, the further out you go, the greater the variation, leading to a lower degree of Alignment. The consequences are severe as the people in these roles are often the face of the organization, delivering the brand and purpose directly to the customer. Or in the case of Mountain View Whisman School District, the students and community you serve.

Taking the time, resources and effort to be consistent and intentional with implementing the plan, and getting Alignment throughout an organization, is multiple times more critical than its actual development. While the plan is important, focus on Alignment assures you that you are going in the right direction. A lower degree of Alignment slows activity, stunts progress, invites failure and frustration, and ultimately wastes resources. People will be busy and components of your plan might get done, but lack of Alignment seriously minimizes its impact.

Why Infinity Systems

Infinity Systems is dedicated to supporting leaders. We empower leaders, giving them data and support to align their organizations and drive positive results. We are here to make your Leadership Development and in turn, all other Initiatives successful. In your effort to make progress and improvement with your leadership, we are equipped and experienced in the areas that will bring you foundational support for results and ongoing success. Because of our expertise connecting with leaders and helping them understand exactly how Organizational Alignment impacts their organization. We have experience across multiple industries, with organizations dealing with their own unique challenges at various stages on their Alignment Journey.

Infinity Systems has a track record of working with educational institutions, corporations and governmental entities, supporting their Organizational Alignment. We've worked with organizations to embed these Alignment concepts into daily activities through their main asset, their human capital. We have helped them solidify the Purpose of their organization, strengthen the personal commitment within each area, down to each member to achieve strong results. In addition to imbuing the plan, we support leaders as they communicate their goals, empower their teams to support the ongoing process and capture their experience, telling the story of their Alignment Journey to all stakeholders.

Alignment and Business Development Model
Components
Part 1 - Orgametrics® Survey Deployment
    - Implementation - survey build, communication and launch
    - Data Review - Initial Review with Superintendent Rudolph
    - Leadership Review and Discussion - Leadership/Administrative Team Members
Part 2 - Leadership Alignment Development (Formal, scheduled conversations throughout the year)
    - Action Planning and Alignment Mapping
    - Ongoing Leadership Support (Informal)
Part 3 - Community Business Development and Brand Management Model
    - Story Development
    - Story Communication
    - Advisory Board Formation/Facilitation
Part 4 - Orgametrics® Survey Deployment
    - Implementation - survey build, communication and launch
    - Data Review - Initial Review with Superintendent Rudolph
    - Leadership Review and Discussion - Leadership/Administrative Team Members
Part 5 - Metrics that Matter
    - Correlation between KPI's and Survey Data
    - Specific Performance Connections
    - Recommendations based on metrics (and on future metrics)
    - Database for future comparisons
Part 6 - Recommendations and Leadership Development Planning

Part 1

Orgametrics® Employee Alignment Survey: 21-item pulse survey

Using the proprietary Orgametrics® survey, Infinity Systems will measure your Organizational Alignment. We will build a survey to collect data in 9 categories: Communication, Accountability, Leadership, Teamwork, Creativity, Empowerment, Best Practices, Development and overall Alignment to Vision/Mission/Strategic Plan. The survey will also collect data by specific demographics, so we are able to show you responses by any classification that is collected. The survey is built to your specifications and tested before launch. Once launched via email to all employees, responses come directly to us and we provide all respondents with technical support as a third party throughout the survey window.

Reporting

Orgametrics® Reporting includes the review presentation itself, to be shared as the agenda for each review meeting. We will also share the following report files:

1. Snapshot Report
   a. Overall Orgametrics® Score
   b. Alignment Scores by Scale (plus visual: radar chart)
   c. Aligned, Semi-Aligned and Mis-Aligned scores by Scale and Item
2. Comparison Report

      a. Scores by demographic (scale/item by total aligned responses)

      b. Scores by demographic (scale/item by percentage of aligned response)

3. Comments Report

      a. Comments by scale

      b. Comments in a table allowing to filter by scale and demographic

Additional reports may be provided upon client request.

Data Analysis and Interpretation

Infinity Systems will provide summary and demographical data breakdowns. Respondent comments will be shared anonymously to provide additional context to the data. We will identify where the greatest levels of Alignment and misalignment exist within your organization along with discussion of the possible root cause and solutions that may be applicable.

Recommendations

Infinity Systems will identify and rank the key drivers of Alignment in your organization, along with recommended solutions for improving your Organizational Alignment. Infinity Systems will identify specific recommendations based on your strengths, areas with the most challenge/concern in your organization.

The recommended solutions are based specifically on your Orgametrics® data and the steps taken by organizations in both the public and private sector to make improvements using specific strategies after data revealed similar findings.

Leadership Review and Discussion

The purpose of the Leadership Team Action Planning sessions is to bring key leaders together to discuss the specific results from your survey deployment. We will deliver this in two phases:

Phase 1 - Superintendent Rudolph

Phase 2 - Leadership/Administrative Team

In each of the two meetings will complete the following steps:

1. **Review and Calibration**

   Leaders will walk through the summary review of the data and we will engage them in a deeper discussion around the data. This is also a great time to answer questions and ensure that everyone is on the same page, throughout the leadership team. During phase 1, MVWSD Leaders will:

   - Gain a deeper understanding of the elements of Organizational Alignment
   - Understand survey results and what they mean
   - Take the results personally and commit to action

2. **Discussion and Priorities**

   Leadership team/cabinet members will take further steps to analyze survey results and begin to develop a deeper understanding of the current reality. Team members will engage in leadership development that is critical for driving Organizational Alignment. During phase 2, MVWSD Leaders will:

   - Work collectively to determine most important Alignment areas for your organization
   - Understand the role leaders play in aligning organizations

- Understand themselves better as leaders and know their colleagues on a deeper level
- Develop new perspectives on accountability

As we get to know MVWSD and its leaders we will have the context we need to smoothly move from data analysis to review and help you and your Leadership Team move right into action while supporting and helping them improve their leadership skills.

Part 2

Leadership Alignment Development

With the Orgametrics® survey completed and with your results analyzed and discussed, MVWSD stands ready to implement a plan to bring more alignment through the organization, but first, in our experience, we have seen that this is the best time to start with a foundation of Alignment Development for your leaders.

We will engage your leaders with specific Alignment Development Strategies. In this process, your leaders will have support in their role as leaders. This process is specifically focused on the importance of leaders operating at the level of leadership that allows them to stay focused on the purpose of the organization, while cascading the message to their team in order to carry out that purpose.

This work will be done in a combination of alignment workshops, team discussions and individual conversations. These engagements will be conducted throughout the year, with schedule and content based on your needs and priorities.

Leadership Alignment Development helps each member of your Leadership Team develop skills needed to drive greater alignment and success throughout your organization. Infinity Systems' experienced Leadership and Alignment Development Consultants work with your leaders in groups and one-on-one.

Action Planning and Alignment Mapping

With a strong foundation in Alignment and support in their specific areas of need (team and individual), we are ready to put a plan in place. We call this plan the Alignment Map or Journey Map. In order to have the most impact, the Map will initially concentrate in the areas of Mission/Vision/Strategic Plan, Communication, Leadership and other scales, as determined by the leadership team, based on scores, specific areas of strength or need for improvement. Activities taken in each area will overlap, and they will tangentially have impact on most, if not all components of Alignment (Scales).

Your Leadership team and each member will have specific goals to drive alignment in the following areas:

- Key Alignment Drivers (Orgametrics® Data)
- Carrying and Communicating the Mission/Vision/Strategic Plan throughout the organization
- Carrying and Communicating the Mission/Vision/Strategic Plan in their area(s) of accountability
- Any area(s) of Alignment with particular importance, based on organizational needs

Ongoing Leadership Support

Infinity Systems will provide ongoing Leadership Support for all Leadership and Administrative Team members involved in Planning and Mapping sessions and any building leaders where appropriate. We will develop specific action items, as determined in the Planning and Mapping sessions. In addition to the group and

individual development sessions, leaders will receive specific reports and may engage our team for ongoing data and planning needs. Knowing that your Leadership Team is tasked with taking the knowledge and skills gained from the Orgametrics® Alignment data, Alignment Development and applying it to gain specific results, we know that they will need support throughout the year.

We are your partner in Leadership Facilitation and are here to help you bring your plan to life. We are available as your guide on this meaningful journey. Our Leadership Alignment Consultants will be a resource to answer questions, help clarify details and support any initiatives as needed in-person, via phone and email communication throughout the year.

Part 3
Community Business Development and Brand Management Model

The objective of the Community Business Development and Brand Management Model is for the Mountain View-Whisman School District to be engaged with the broader businesses community in conversations about funding of district programs and strategies.

Core Components

There will be 3 Core Components of the Process:

- Story Development
- Story Communication
- Advisory Board Formation/Facilitation

This process is based on a few guiding principles:

- Building awareness, engagement and consideration of partnering with the District amongst a broad range of area companies, both large and small, not only serves this effort, but enhances the general brand goals of the district
- Developing relationships with a larger group of company prospects will provide a better opportunity of connecting with those that will have more desire to partner with the District than directly engaging very large, but few, opportunities (Microsoft/LinkedIn) that may not have an interest in supporting the needs of younger students. In other words, this process will better identify those entities interested in what the District does with less effort even if the size of partnerships may initially be smaller than what could occur with one large partnership.
- Engaging the business leaders within organizations that see specific market opportunities can be more effective than taking time working with foundation and corporate responsibility people directly, as they have agendas outside of potential market opportunity.
- Engaging with organizations in conversations as they are ready for each step is a much more effective use of District resources and will lead to more substantive partnerships that will support financial goals, student goals and partner company goals.

- Learnings from conversations with business leaders will enhance the District's Orgametrics® journey and bring an even better end story for all stakeholders.

Dr. Rudolph will engage directly with CEO, Art Johnson and team, while district leaders will concurrently be working on overall alignment initiatives.

Our plan is to form an Advisory Board for the Superintendent of Mountain View Whisman School District. This Board will be comprised of:

- Community Leaders
- Senior level business executives, with specific targeting of the C-Suite.

The purpose of this Board

- To advise and support the Superintendent in (but not limited to) matters of management, leadership, fiscal solvency and fundraising.

With this board, we will:

- Establish a "target list" of candidates
- Formulate the communication plan to reach the candidates
- Facilitate board meetings and member events
- Manage activity in specified objectives established by and for the board

Our focus will be on board member participation and aligning the activities to the vision of Dr. Rudolph and the School Board to support the Mountain View Whisman School District and the community as a whole.

Part 4
Orgametrics® Employee Alignment Survey: 21-item pulse survey (Post-Assessment)
Same components as Part 1:
Deployment
Reporting
Data Analysis and Interpretation
Recommendations
Leadership Review and Discussion

Part 5

Metrics that Matter - Survey and Metrics Analysis

Infinity Systems will gather data from surveys completed by MVWSD employees. We will compare this data to specified performance metrics (KPI's) and provide the following:

- Correlation between KPI's and survey results
- Ranking of connection between performance and results on each survey (overall and within categories)
- Recommendations on future surveys and performance metrics as they relate to your overall strategy
- Database for ongoing comparison of survey data, performance metrics and their correlation

Part 6

Recommendations and Leadership Development Planning

Throughout the year, Infinity Systems will identify specific recommendations based on your strengths, areas with the most challenge/concern as well as the key drivers of Alignment in your organization. The recommended solutions are based specifically on your data and the progress made in implementation of initiatives throughout the year. We will also take into account, the strategies used by organizations in both the public and private sector that have made successful improvements after data revealed similar findings. We will also summarize key themes and from Mapping through Coaching to determine progress on all goals set throughout the year.

The Orgametrics® Journey process is designed to cover 18 months. The survey is deployed at these intervals to measure progress and determine areas of need and next steps. Infinity Systems will provide ongoing Leadership Support for all leaders involved in the facilitation of any/all initiatives. We will also provide you with a roadmap for future initiatives, rooted in the Organizational Alignment concepts that your team will be focused on for the next 18 months and beyond.

We will set up a year-end review and planning meeting to discuss: Changes in programming, such as additional engagements, initiatives or simply refinement of the current structure, can be finalized in our year-end review and planning meeting.

Alignment and Business Development Model
Pricing

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Total: $135,000
Or Subscription Pricing: $22,500 billed quarterly over 18 months (6 quarters/installments)

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What do we need from you?

The most successful organizations we work with have a clear plan in place to make their Alignment Journey part of the organizational culture. They also have a leader taking ownership of the process and expecting accountability to and from the organization. The journey is about making a shift toward alignment and making it part of all initiatives going forward. The more focus on alignment a leader has, the more they can hold teams accountable. That process starts at the top/center of the organization. There are few specific steps to make deployment and ongoing success a smooth process:

1. **Engagement and Accountability**
    - Leader - owner of process, setting the goals and holding themselves/their leaders accountable
    - Leadership Team engaged in the process from the beginning
    - Contacts identified, introduced and engaged in their roles from the beginning
        o Point - main point of contact for implementation of the survey
        o Technical - point of contact for technical details and communication (IT)
    - Timeline Determined - for engagements, process for updates established and executed
        o Initial steps- launch date, review date(s), check-in calls/visits, next engagements planned
    - Materials Produced/Shared (according to your timeline, examples to be shared in implementation)
        o Emails - .csv file containing email addresses and first, last names of all employees
        o Intro Letter - letter from leader alerting employees of the process and any goals
        o Goals - metrics that determine success in your organization

2. **Communication**
    - Internal
        o Employees given information about the survey and other steps in the process
        o Leaders clear on concepts and roles in driving improvements
    - General
        o Goals, Priorities, Progress, challenges all communicated clearly throughout the journey

3. **Outcomes**
    - General goals set in initial phases:
        o Goal 1- clear understanding of Alignment concepts and components (leader/point)
        o Goal 2- clear communication of Alignment concepts and components among senior leaders
        o Goal 3- clear communication of Alignment concepts and components from senior leaders to director/department/campus level
        o Goal 4- clear understanding of your data (at all levels)
        o Goals 5 and beyond- specific initiatives based on data (strengths/opportunities), priorities
    - Specific goals based on metrics that measure success in your organization
        o Baseline data
        o Benchmarks to measure improvements along the journey
        o Additional metrics developed through communication of plan (by/for your leaders)

Next Steps

We will modify the details above at your request. This work will begin once we confirm a launch date for the next survey.