

November 19, 2022

Laura Berman, MVWSD Board,
lberman@mvwsd.org
Laura Blakely, MVWSD Board,
lblakely@mvwsd.org
Ayindé Rudolph, Superintendent, MVWSD,
arudolph@mvwsd.org

Dear Laura, Laura, and Ayindé,

I am looking forward to our work together scheduled for the Mountain View Whisman School District (“MVWSD”) Trustees Board Retreat scheduled for December 10, 2022. I’m pleased to submit this proposal regarding the teambuilding.

Teambuilding Goals

Based on our discussions, you would like to achieve a number of goals that roughly fall into two main categories: Team Cohesion and the Work of the Board (e.g., Strategic Plan):

Team Cohesion

- Integrate new Board members and provide a strong foundation for Board effectiveness for the new term.
- Enhance the team’s cohesion and collaboration (e.g., realizing a shared purpose, recognizing shared values and how the values show up in the Board’s).
- Build on the team’s progress regarding communication/team effectiveness since the April 2022 retreat.
- Enhance appreciation for the other team members (and their own contributions as well)
- Enjoy the time together (have fun!)

Work of the Board

- Connect to the Strategic Plan (as a “North Star”) and identify ways the Board can support progress and/or safeguard against difficulties in implementation.
- Reinforce and update team norms that support healthy and productive interactions (including those that are difficult or involve conflict).
- Identify next steps for sustaining progress

Recommendation

In creating a design for the day, I identified a number of options to meet your objectives. However, in doing so, the offsite length increased to 5.5 hours from your original 3.5-hour target. Note: the 5.5 hours includes two 10 min breaks and 45 minutes for lunch; (essentially 9-2:30pm). As a result of this difference, I would like to review the design with you – to confirm the priorities and walkthrough my recommendations. Here is my current recommendation to support the objectives for the meeting:

Pre-Retreat Activities

- Design Meeting:
 - One or two 60 min. design meetings to finalize the objectives and design of the offsite.
- Email template for you to edit and use as desired to announce the offsite.

Retreat Activities: The retreat will consist of a combination of activities such as:

Team Cohesion

- Transition to New Board. Exercise to acknowledge/appreciate/grieve old board and identify what's wanted/needed/carried forward for this new chapter. Provides space to name both highs and lows – gets it out in the open and identify conditions that would allow them to occur. Provides foundation for Designed Team Agreements and for Strategy conversations later in the day.
- Review of progress/learnings since last retreat. *What is Working Well (WWW)* and Items to improve “*Even Better If...*” (implement a change (EBI)). A structured retrospective to acknowledge and capture learnings.
- Values Wheel. Interactive activity to enable the team to take a dive deep into the values folks want to inform the Board discussions/operations. For instance, values could include Advocacy, Deep Democracy (all voices are important), Respect, Collaboration, Service, etc.
- (Review/Revise) “Roles”. Review Inner and Outer roles to surface implicit assumptions and provide a common language/framework for decisions. Activity will allow folks to revise their Inner roles designation; allow new members to add their assessment and importantly, review “Inner Roles” to identify ‘missing’ or ‘over-used’ roles.
- Appreciation exercise. Short exercise to support team cohesion.

Work of the Board

- Strategic Plan: Identify conditions for successful/not successful implementation and what the Board can do to support progress and remain aligned with the strategic plan.
 - Quick/high-level overview / update of Strategic Plan to provide context for discussion (if needed).
 - Acknowledgement of progress. According to the MVWSD website, there's been a fair amount of success to date in implementing the strategic plan. Identify and celebrate these factors that have enabled that success.
 - Conduct a Pre-mortem on a worst-case scenario to identify what could inhibit success and determine ways to either mitigate or to minimize these factors.
- Update Designed Team Agreement (DTA) – Review and update the DTA to incorporate any lessons learned and to enable new members to weigh in. The DTA is a structured discussion to intentionally create new healthy and productive team norms. Discussion includes not only how they team wants to be together in good times but when things get difficult. Creates an environment that supports safe and honest communication; enabling board members to express their viewpoints in a productive way
 - Incorporates regular 'accountability' and check-ins to ensure the Board is meeting its objectives as well as holding to the Designed Team Agreement.
- Next Steps discussion to capture action items and support continued momentum.

Post-Retreat Activities

- 1 hour follow-up meeting with you to discuss observations and methods to sustain the teambuilding.

Project Fees

My fee is \$5400.00, inclusive, for facilitating the Retreat. This fee includes all pre-meeting consultations, meeting design and development; meeting facilitation; a 1-hour follow-up meeting with you to discuss my observations and methods to sustain momentum. This fee represents my educational discount of 25%.

Assumptions

- Time allocated for 'active' work during the Retreat: Approx. 5.5 hours (9-2:30pm with 45 min for a lunch break and two 10 min breaks).
- The Retreat will occur at MVWSD facilities. MVWSD will provide all refreshments.

- Judy Levy will work with you or your designee to arrange audio-visual equipment and room set-up. Please have the following items available; items with an asterisk (*) indicate that Judy can supply them if needed.
 - Projector* (I have an iMac computer and connectors)
 - Screen or other location to project presentation
 - Flipchart and easel*
 - Large wall or whiteboard on which to tape up flipchart paper
 - A large open space in which the team can move around freely.
- All project expenses, such as employee travel, food, space rental, materials, will be paid by MVWSD.
- Payment terms are Net 30. Remittances can be sent to Judy Levy, LevyConsulting 213 Orchard Glen Ct. Mountain View, CA 94043.

Summary

I appreciate the opportunity to support you in building your team's engagement. I have tried to translate our discussion into a viable project, but if I have dramatically missed your intention around scope or your expectations around price, I look forward to reviewing (and possibly revising) this proposal at your earliest convenience.

Regards,

Judy

Judy Levy, Founder
LevyConsulting

Judy works with Senior Leaders who face the challenges of a rapidly changing and complex environment. She helps them confidently navigate that environment, lead their teams successfully and reach their professional goals.

Judy provides a unique blend of coaching, organization effectiveness, management development, mindfulness, conflict resolution, and neuroscience. This combination allows clients to have just-in-time, tailored support -- getting the technique/approach that's most effective for them NOW in their current situation.



Judy helps leaders and their teams by:

- Developing executives to have a dramatic, immediate influence on team performance through assessments and coaching to drive success.
- Coaching leaders to access and grow their own innate skills and qualities, become aware of blind spots (that could sabotage career goals), and learn how to apply and sustain new skills.
- Helping leaders and teams learn how to rebuild relationships after particularly challenging situations, with techniques to enhance emotional intelligence and mindfulness.
- Breaking down silos that inhibit effective collaboration and innovation; helping address and resolve issues that may have given rise to dysfunctional teams.
- Twenty-five+ years' experience working in a wide range of organizations including large high-technology and bio-tech companies (Cisco Systems, GE Healthcare, Guidewire Software, Octel/Lucent, Salesforce, Uber, Varian Medical Systems), multi-national service corporations (American Airlines, Andersen Consulting, Fidelity Investments), NGO's, Education and Government agencies (First Five California, Santa Clara County, Stanford University).

Judy holds a MS degree in Organizational Development, a BA in Psychology, has achieved the ICF designation of Master Certified Coach (MCC), is certified in NeuroLeadership, is a Certified Organization and Relationship Systems Coach (ORSCC) and a MBTI Master Practitioner.

Additionally, Judy serves as President of the Bay Area Association for Psychological Type, Co-director of SF Bay Area ORSC and a member of the Association for Psychological Type International, the International Coaching Federation (ICF) and the NeuroLeadership Institute. She is also an adjunct instructor at UC Berkeley Extension, Organization Development Certificate program.