



Vision Session II Report



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Introduction

To follow up on the findings from the first Vision Session, OPX conducted a second Vision Session on September 20th, 2018 to allow Alexandria City Council (Alexandria) and Alexandria City Public Schools (ACPS) to further explore the Task Force Recommendations. The majority of the session was spent evaluating and scoring the Task Force Recommendations using the comparative evaluation matrix developed in the first session.

The goal was to use the previously developed Decision Criteria to score and prioritize the recommendations, develop supplemental tactics and define the specific areas that they will address to achieve overall strategic intent. The prioritized rankings and an analysis of the scoring will form the basis of this report.

Background

On May 19th, 2018, Alexandria and ACPS engaged OPX to help determine how the two bodies can collaborate more effectively and develop a decision-making guide that will help define a shared strategic vision for the future of Alexandria and ACPS. The initial Vision Session was held in response to the first of the Ad-Hoc Joint City-Schools Facilities Investment Task Force's observations and recommendations:

Observation: Alexandria lacks a unified and distilled vision for the future.

Recommendation: We [the Task Force] recommend Alexandria define its "Targeted New Reality" to clarify priorities for decision-making when considering how best to deliver capital projects and services.

Vision Session 1



This engagement assessed, analyzed, and helped formulate scenarios for how the City of Alexandria and ACPS can leverage their resources and overcome obstacles to realize guiding principles and develop a decision making lens for their continued collaboration in achieving common goals.

OPX conducted a brainstorming-style Vision Session aimed at aligning, prioritizing, and better understanding Alexandria and ACPS's existing Resources and Obstacles, big-picture Values and Guiding Principles, and Decision Criteria (see the first Vision Session Report for full summary of the engagement). During the session, participants explored important considerations around which to build agreement and developed a document to structure and guide new collaborative efforts and assess future initiatives and tactics, such as the Task Force Recommendations and the Joint Facilities Master Plan.

The list of participants and the primer content from the Session are included in the Appendices at the end of the report.

Vision Session 2



The goal of the second Vision Session was to allow the two bodies to discuss, evaluate, and prioritize the Task Force Recommendations using the previously developed Decision Criteria.

Recommendation Scoring

Prior to the session, joint leadership from Alexandria and ACPS narrowed the original Task Force Recommendations down to a list of 11 to score during the session. Participants rated, on a scale from 1 to 5, how well each of the prioritized Decision Criteria from the first Vision Session supported each of the Task Force Recommendations. Individual scores were averaged, then summed to create a prioritization for the recommendations (see score card on following page). The Decision Criteria exercise from the first session provided a framework for assessing and selecting future decision alternatives. It served as an opportunity to define the most important criteria, discuss the merits of each, and prioritize them. When faced with ideas and concepts that have competing priorities, the criteria determined in this exercise will guide the decisions for Alexandria and ACPS. The prioritized Decision Criteria are as follows:

1. Urgency/priority
2. Cost
3. Mission alignment
4. Complete analysis
5. Return on investment
6. Risk
7. Flexibility/resiliency
8. Community engagement/input

The prioritized recommendations, with their total scores (out of a total of 40) are below:

2. Develop a long-term Joint Facilities Master Plan to provide a comprehensive, integrated, citywide view of Alexandria's capital needs and ensure best use of assets. (32.2)
7. Leadership is responsible for making decisions best for all Alexandrians. Civic engagement should be one component of the decision-making process. (31.6)
9. Establish a common and efficient approach to track and execute preventive maintenance. (30.9)
8. Identify common data criteria and create comparative asset data for use in facilities planning, maintenance and operations. (29.6)
1. Develop a 'Capability Delivery Model' or similar process model to ensure all options are explored prior to assuming a specific capital project is required. (29.6)
11. Identify and implement ways to increase collaboration, resources and flexibility in procurement to include previously absent approaches, such as shared service agreement opportunities. (29.3)
5. Develop a framework to empower staff to pursue alternative delivery of projects in a consistent manner. Initiate a pilot project to serve as a model that can be modified over time. (28.7)
6. Identify adequate resources to support and expand citywide technical expertise so that efforts can be coordinated, informed and executed strategically. (28.2)
3. Revise the budget calendar to decouple the annual operating and capital budgeting cycles in order to provide adequate time and resources to review,

	1	2	3	4	5	6	7	8	TOTAL MAX:40
	Urgency/Priority (10)	Cost (7)	Mission Alignment (5)	Complete Analysis (5)	Return on Investment (4)	Risk (2)	Flexibility/ Resiliency (2)	Community Engagement (1)	
	1: Low priority 5: High priority	1: Low cost 5: High cost	1: Low alignment 5: High alignment	1: Weak analysis 5: Strong analysis	1: High ROI 5: Low ROI	1: High Risk 5: Low Risk	1: Low flexibility 5: High flexibility	1: Low engagement 5: High engagement	
1	4.1	3.6	4.3	4.2	3.9	3.9	2.7	2.9	29.6
2	4.7	3.6	4.7	4.2	4.2	3.8	2.9	4.2	32.2
3	3.5	3.5	4.1	3.4	3.0	3.6	2.7	3.1	26.9
4	2.7	3.6	3.7	3.2	2.9	3.9	3.6	2.7	26.1
5	3.8	3.6	4.2	3.9	3.8	3.3	3.0	3.0	28.7
6	3.7	3.0	3.8	4.0	4.0	3.6	3.4	2.7	28.2
7	4.3	3.9	4.2	4.3	3.6	3.6	3.3	4.4	31.6
8	4.3	3.0	4.8	4.5	3.9	3.9	2.9	2.4	29.6
9	4.7	3.4	4.5	4.3	4.5	4.1	3.2	2.3	30.9
10	3.3	3.0	3.3	3.6	3.6	3.9	2.8	3.2	26.6
11	3.7	4.3	4.1	3.8	4.2	3.8	3.1	2.5	29.3

engage and make capital decisions. (26.9)

10. Develop, implement and regularly update design guidelines, specifications and standard operating procedures that meet lifecycle goals and objectives. (26.6)
4. Consider changing the way projects are reflected within the CIP: projects and funding that are less defined should be reflected in contingency accounts. (26.1)

Joint Facilities Master Plan

During the session, participants generally agreed that the Task Force Recommendation – Develop long-term Joint Facilities Master Plan to provide a comprehensive, integrated, citywide view of Alexandria’s capital needs and ensure best use of assets – was the most important. The discussion was also supported by the final scorecard where this recommendation received the top score. “This recommendation gets to the heart of what we’re looking to get out of the task force,” said one participant. “This is the overarching goal,” said another. This recommendation also tied as having the highest urgency/priority as much of the future work of the two bodies will depend on the outcome of this initiative.

Civic Engagement and Leadership

“Leadership is responsible for making decisions for all Alexandrians. Civic engagement should be one component of the decision-making process.” Participants ranked this as the second most important Task Force Recommendation. It also ranked as the recommendation with the highest community engagement component. Not surprisingly, civic engagement is

extremely important to both bodies, in part explaining the high ranking of this recommendation. While participants acknowledged that community engagement and input are vital, ultimately it is the leadership that was elected to make decisions. The results of this session will act as a guide for facilitating future decision making and will be important to develop further structures for enabling efficient and transparent decision making.

Establish a Common Approach to Preventative Maintenance

“Establish a common and efficient approach to track and execute preventive maintenance.” Participants ranked this as the third most important recommendation overall, but ranked it as being the most urgent, having the highest return on investment, and carrying the lowest risk of all recommendations. As one participant said, “This recommendation is very important to the School Board, especially. Maintenance of city and school buildings is an extremely urgent issue.” While preventative maintenance will be costly in the short term, it will only get more costly in the future. Because of this, participants agreed that it has a high return on investment (ROI) and should be prioritized. It was also pointed out that the preventative maintenance recommendations is closely enmeshed with the tenth Task Force Recommendation – Develop, implement and regularly update design guidelines, specifications and standard operating procedures that meet lifecycle goals and objectives. While this recommendation ranked second to last, it should be considered in relation to preventative maintenance. It may make sense to address these recommendations contemporaneously.

Develop a Framework

“Develop a framework to empower staff to pursue alternative delivery of projects in a consistent manner. Initiate a pilot project to serve as a model that can be modified over time.” While this recommendation ranked as the sixth most urgent and the seventh most important overall, its urgency was discussed in depth during the session. Participants stressed that this recommendation should be addressed early on and not left to the end. The paradigm around empowering staffs will need to change. The city manager and the superintendent are managing the staff and have the expertise to bring all the components together. One participant said, “There needs to be cohesion amongst the staff in terms of priorities and work needs to be held accountable.” It was also discussed that the staff should not merely be handed “marching orders”, but be asked for their input and expertise.

Identify Resources

“Identify adequate resources to support and expand citywide technical expertise so that efforts can be coordinated, informed and executed strategically.” This recommendation garnered a discussion in the session but did not score particularly highly in the final tally. Participants mentioned how it will be important to look at how departments are structured and identify efficiencies and appropriate needs. As one participant said, “This recommendation should be an important starting point. We should have the staffs in place and the expertise to move this forwards. From a business perspective, this should be one of the highest priorities.” Another participant added, “Senior staff need to know that they will have the support to ask for additional resources as needed.”

An important issue that arose during this discussion is that for a lot of these recommendations, but identifying adequate resources and coordinating efforts in particular, require a longer “runway” than the bodies have allotted themselves in the past. For coordinated, strategically executed results, it may be necessary to begin thinking well in advance for any collaborative initiatives. The two bodies will need to allot adequate time to consider shared resources and expertise, engage the community in the process and solicit sufficient feedback, and develop comprehensive and collaborative plans of approach. A coordinated effort to bring together all these components will be paramount in successfully implementing the Task Force Recommendations and any future collaborative efforts.

Next Steps

Alexandria and ACPS engaged in discussions that resulted in a prioritized ranking of the Task Force Recommendations and a decision-making guide that can be used to assess and evaluate future initiatives. Through the work of both Vision Sessions, the existing members of the joint bodies, as well as incoming new participants, have a strong starting point to continue the work outlined by the joint Task Force. The prioritization of these recommendations gives the staff of both groups concrete direction based on solid and supported decision criteria to begin the critical work ahead. The results of these sessions also provide the foundation for the future collaboration between the two bodies and will help guide the decision making process for future projects and planning.

Beyond The Task Force Recommendations, the Decision Criteria and the Evaluation Matrix can be used to assess any new collaborative efforts. As tactics and initiatives are developed, the two bodies can use the Decision Criteria to structure conversation and analysis around these new collaborative efforts. The following are example tactics that can be evaluated using the Decision Criteria matrix.

- Establish parameters for equivalent compensation and benefits for City and ACPS staff.
 - Commit to creating amicable work environments to increase staff retention.
 - Analyze to determine if the DASH and school bus transportation systems could collaborate to optimize the operation.
 - Align communications plans between the City and ACPS to support each other's message.
 - Upgrade all combined sewer systems on an expedited timeline.
 - Provide the best quality food that is high in nutrition to students.
 - Create and implement a fair standard for all coach stipends.
 - Develop a plan to regain affordable housing that has been lost throughout the City.
 - Expand the dual language program to provide continuity through all grade levels.
- Establish and adopt co-location requirements of all departments to influence future development.
 - Improve access to and provide equity in after-school programs.
 - Develop a comprehensive city-wide plan to increase pre-school capacity
 - Increase adult services and education to enhance and retain our workforce.

Appendix A: Participants

This is the list of attendees who participated in the September 20th, 2018 Vision Session.

1. Paul Smedberg (City of Alexandria)
2. Veronica Nolan (ACPS)
3. Christopher Lewis (ACPS)
4. Del Pepper (City of Alexandria)
5. Hal Cardwell (ACPS)
6. John Chapman (City of Alexandria)
7. Cindy Anderson (ACPS)
8. Allison Silberberg (City of Alexandria)
9. Ramee Gentry (ACPS)
10. Justin Wilson (City of Alexandria)
11. Ronnie Campbell (ACPS)
12. Bill Campbell (ACPS)
13. Tim Lovain (City of Alexandria)
14. Karen Graf (ACPS)
15. Margaret Lorber (ACPS)
16. Steve Polo (Moderator-OPX)

Appendix B:

Vision Session Primer

Alexandria City Council and Alexandria City School Board Vision Session 2

September 20, 2018

AGENDA

- Introductions and Review
- Review Decision Criteria
- Prioritize Task Force Recommendations
- Tactics and Next Steps

INTRODUCTION

On May 19th, 2018, Alexandria City Council (Alexandria) and Alexandria City Public Schools (ACPS) School Board engaged OPX to help determine how the two bodies can collaborate more effectively and develop a decision-making guide that will help define a shared strategic vision for the future of Alexandria and ACPS. The Vision Session was held in response to the first of the Ad-Hoc Joint City-Schools Facilities Investment Task Force’s observations and recommendations:

Observation: Alexandria lacks a unified and distilled vision for the future.

Recommendation: We [the Task Force] recommend Alexandria define its “Targeted New Reality” to clarify priorities for decision-making when considering how best to deliver capital projects and services.

OPX conducted a brainstorming-style Vision Session aimed at aligning, prioritizing, and better understanding Alexandria and ACPS’s existing Resources and Obstacles, big-picture Values and Guiding Principles, and Decision Criteria (see Vision Session Report for full summary of the engagement). During the session, participants explored important considerations around which to build agreement and developed a document to structure and guide new collaborative efforts

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and assess future initiatives and tactics, such as the Task Force Recommendations and the Joint Facilities Master Plan.

The goal of the second Vision Session is to allow the two bodies to further explore and define the Task Force Recommendations, develop supplemental tactics and define the specific areas that they will address to achieve overall strategic intent. We will complete the Comparative Evaluation Matrix, using the Decision Criteria from the first Vision Session, to score and prioritize future initiatives and tactics.

Goals

- Prioritize Task Force Recommendations
- Develop and/or assess tactics to address Task Force Recommendations
- How to use the Decision Criteria in the future

DECISION CRITERIA

In the first Vision Session, the Decision Criteria exercise provided a framework for assessing and selecting future decision alternatives. It served as an opportunity to define the most important criteria, discuss the merits of each, and prioritize them. When faced with ideas and concepts that have competing priorities, the criteria determined in this exercise will guide the decisions for Alexandria and ACPS. The list below is the prioritized list of Decision Criteria participants ranked in the first Vision Session

1. Urgency/priority
2. Cost
3. Mission alignment
4. Complete analysis
5. Return on investment
6. Risk
7. Flexibility/resiliency
8. Community engagement/input

STRATEGY AND TACTICAL SCORECARD

We will use these Decision Criteria to develop a chart like the one below to help score and prioritize future initiatives and tactics. As an example, the fourth Task Force Recommendation states, “We recommend the City and ACPS develop long-term Joint Facilities Master Plan to provide a comprehensive, integrated, citywide view of Alexandria’s capital needs.” Using a point, check, or other rating system, this recommendation can be plugged into the Evaluation Matrix (below) and assessed against the top eight Decision Criteria. This Recommendation will need to be evaluated and scored on its urgency, cost, mission alignment, level of analysis, return on investment, risk, flexibility, and level of community engagement. If desired, more weight can be placed on the higher ranked Decision Criteria, such as urgency and cost. The Evaluation Matrix will give structure to and make transparent discussions and decision making

around collaborative efforts going forward, such as implementing the Task Force Recommendations.

NEXT STEPS

Beyond The Task Force Recommendations, the Decision Criteria and the Evaluation Matrix can be used to assess many new collaborative efforts. As tactics and initiatives are developed, the two bodies can use the Decision Criteria to structure conversation and analysis around these new collaborative efforts. The following are example tactics that can be evaluated using the Decision Criteria matrix.

- Establish and adopt co-location requirements of all departments to influence future development.
- Align communications plans between the City and ACPS to support each other's message.
- Develop a plan to regain affordable housing that has been lost throughout the City.
- Expand the dual language program to provide continuity through all grade levels.

We will spend a brief amount of time going over how the Decision Criteria can be used moving forward.

We are looking forward to the session and to exploring your objectives and visions for the future. **In the time prior to the session, please take a first pass at scoring The Task Force Recommendations using the matrix on the following pages, and bring this to the meeting.** On a scale from 1 to 5, with 1 being “doesn’t support” and 5 being “strongly supports”, please rate how well each Decision Criteria supports the Task Force Recommendations. Don’t worry about totaling your scores. When we determine the scores in the session, we will weight the scores based on the Decision Criteria rankings. Your active participation will ensure that the session provides the team with the most valuable information.

Thank you!

The OPX Team

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