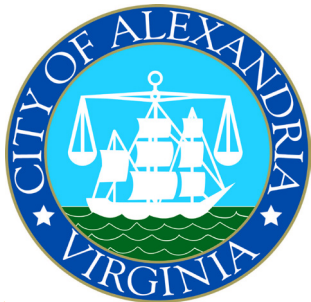




# Vision Session Report



MAY 2018



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# Introduction

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 with members of the Alexandria City Council and the ACPS School Board. The results of this session are the basis of this report.

The 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. During the session, all participants explored important considerations around which to build agreement. Created and validated by the session's contributors, the resulting output serves as a decision-making lens that will inform decisions about the future vision and planning for Alexandria and ACPS.

The Vision Session took place on May 19<sup>th</sup>, 2018. Twelve (12) members from both the Alexandria City

Our work in this engagement is to assess, analyze, and help 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.

Council and ACPS School Board participated. The three-hour session followed a primer distributed beforehand (see appendix B for copy). Content for the primer was approved by leadership from both bodies prior to the session.

The Vision Session discussions concentrated on the three following categories:

- Resources and Obstacles
- Values and Guiding Principles
- Decision Criteria

Using examples included in the Vision Session primer, as well as their own experiences, participants discussed the importance of different topics under the different categories. For each category, except Resources and Obstacles, participants created a "short list" of the topics they considered the most important and then dot voted on their top priorities. Before prioritizing, however, participants had the opportunity to discuss and make a case for their choices, which ultimately helped the group reach a consensus on the important topics. The results for the Vision Session are presented in this report for each of the exercises.

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

# Resources and Obstacles

Part One of the Vision Session addressed Resources and Obstacles. We started with this in order bring to the surface resources or strengths for Alexandria and ACPS to pull from as well as obstacles to be aware of throughout the process. In going through the subsequent exercises, it was important for participants to have in mind the skills, capabilities, assets, and shared resources of the two bodies. Brainstorming these shared strengths set the stage by highlighting the positive commonalities between Alexandria and ACPS. By bringing the obstacles, challenges, and constraints to light in the beginning, participants were mindful of how these might hinder the process from the outset.

There are many powerful resources for Alexandria and ACPS to pull from in their collaborative efforts. Not surprisingly, the people involved in this effort at all levels emerged as a common theme among resources. Participants mentioned their “talented staffs” and “community residents”, the established “network of involved volunteers”, and the committed bodies present as strengths.

The other strong theme that emerged involved the effective processes and strategies currently in place. There are tools in place to “analyze and share data”, there are established “best practices”, there is a “strategic planning process”, and there are the strategies laid out by the Task Force. Having identified these valuable resources, the two bodies can draw upon these proven processes as they move forward.

Participants mentioned the recent collaboration between the acting Superintendent and City Manager as a positive sign of what can happen when these

two bodies collaborate. This collaborative culture will influence the respective bodies as precedents are set and staff sees the acceptance and potential of such collaboration. It should be noted, however, that this can become an obstacle if this collaboration is to wane or is not done in an effective manner.

Not surprisingly, the first obstacle mentioned was “money”. This obstacle will be ever-present and will need to be kept front-of-mind throughout the process. Other obstacles that involved limited resources included “time”, “land”, and “additional resources needed”. Other obstacles mentioned involved differences in the organization, knowledge, and culture of Alexandria and ACPS. These obstacles, such as “competing needs”, “separate processes/rules”, “trust”, “communication”, and “different levels of understanding”, will need to be addressed and, to some extent, resolved for effective collaboration to flourish between the two bodies.

The complete set of Resources and Obstacles follows:

## RESOURCES

1. Data
2. Talented staffs
3. Talented community/residents
4. Best practices
5. Strategic process planning
6. Task force work
7. Involved community/volunteer network

## VISION SESSION EXERCISES

8. Academic institutions/associations
9. Shared desire/will
10. Community expectations
11. Technical tools to share data/information in a collaborative way
12. "You all" (meaning the combined participant group)
13. Collaboration between two heads (superintendent and city manager).

### OBSTACLES

1. Money
2. Competing needs
3. Size of the challenge
4. The "past"/ "we tried"
5. Inertia
6. Time/everyone
7. Separate processes/rules

8. Schools come to city for money
9. Parochialism
10. Shared accountability system
11. Land (finite)
12. Turnover (staff/elected)
13. Whole community not involved
14. Trust
15. Fear
16. Perception that bodies serve different customers
17. Additional resources needed
18. Communication (between school board and city council)
19. Different levels of understanding
20. The "same" presentation/information throughout time
21. Track record (there's been a spotty track record in the past that has eroded trust)
22. "You all" (meaning combined participant group)

# Values/Guiding Principles

Part two of the Vision Session addressed Values and Guiding Principles. This exercise was aimed at determining big-picture Values and Guiding Principles in order to tie all future decision making to this collective vision. Participants were provided with an initial list of Values and Guiding Principles and proceeded to brainstorm a list of 15. Participants discussed the merits of these Guiding Principles and combined some due to overlap or similarity. After settling on the list of 15, participants were given two dots to vote for their top two choices. Seven (7) Guiding Principles emerged as the most important. It should be noted, however, that the Guiding Principles that did not make the top 7 are still important and should not be forgotten.

## TOP 7 VALUES AND GUIDING PRINCIPLES

1. Decisive (6)
2. Focus on results (6)
3. Mutual respect (3)
4. Share information (3)
5. Schools thrive, city thrives (3)
6. Candor (2)
7. One team (1)

“Decisive” and “Focus on results” emerged as the most important Values and Guiding Principles. Participants described the importance of being decisive when it is easy to say more time and information is needed. Because of the size of the challenge, the fact that there is so much at stake, and the reality of limited

time, money, and resources, it will be important for Alexandria and ACPS to make decisions in a timely manner and with the appropriate amount of data and information in hand. Ultimately, the culmination of this work will be results for the shared vision of Alexandria and ACPS. The focus on these final results should not be lost in the process.

One of the Obstacles discussed in the previous exercise was the perception that the two bodies serve different customers. Partially in response to this obstacle, participants discussed the notion of “schools thrive, city thrives” to highlight the interconnectedness of the two bodies and their missions. There was much resonance around this idea that a successful and thriving school division is essential for a dynamic and thriving city. This idea, along with the “one team” guiding principle, provide the two bodies with connection and a shared sense of purpose that will be indispensable in realizing Alexandria and ACPS’s future vision.

The Values and Guiding Principles that did not make the top 7 are:

- Shared responsibility
- Live by the charter
- Courage
- Fiscal responsibility
- Commitment to academic excellence and rigor
- Embrace change
- Purposeful/organized teamwork
- Use time wisely

# Decision Criteria

The Decision Criteria exercise provides a framework for assessing and selecting future decision alternatives. It serves 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 primer distributed before the session included a list of sample Decision Criteria for participants to consider. Participants proceeded to brainstorm 10 total Decision Criteria and, similar to the previous exercise, dot voted on their top three choices. Eight (8) Decision Criteria emerged as the most important.

## TOP 8 DECISION CRITERIA

1. Urgency/priority (10)
2. Cost (7)
3. Mission alignment (5)
4. Complete analysis (5)
5. Return on investment (4)
6. Risk (2)
7. Flexibility/resiliency (2)
8. Community engagement/input (1)

“Urgency/priority” received the most votes and there was significant discussion around the nuances of urgency versus priority. Many participants believe that Alexandria and ACPS have been in “urgency mode” in that they have been “fighting fires” and addressing

issues that must be dealt with out of necessity rather than a more deliberate, planned approach. Participants described a desired shift towards priority-based action where projects are tackled based on carefully considered import. While many highlighted this distinction, others pointed out that the concepts of urgency and priority may be more linked. “Anything that is in the first five years of the CIP is both urgent and a priority,” said one participant. It should be noted that there is nuance between these terms and moving forward, this concept may need to be explored further. The urgency and/or priority of projects is of utmost importance to the two bodies and will need to be given primary attention when considering competing opportunities.

Not surprisingly, “cost” emerged as an important Decision Criteria and relates to the primary obstacle being “money”. As “cost” will almost certainly impact all future decisions, it will need to be evaluated against other top Decision Criteria such as “urgency/priority”, “mission alignment”, and “return on investment”.

“Complete analysis” tied for the third-ranked Decision Criteria. There is a tension between this criteria and “decisive” and “urgency/priority”, the top-ranked Guiding Principle and Decision Criteria respectively. A “complete analysis” may not always be possible, especially given Alexandria and ACPS’s commitment to being decisive and acting with urgency and priority. Further discussion will need to be given to defining what “complete analysis” actually means given the reality the two bodies are working in.

Return on investment (ROI) also emerged as an important Decision Criteria. Participants noted that



determining the ROI for the types of projects the bodies will be engaged in will not be an easy or straightforward endeavor. As one participant said, “What project doesn’t have a high impact?” Many projects proposed by the Task Force may have less tangible impacts that are difficult to measure and even more difficult to compare across projects. Further discussion will need to be given to how best to measure ROI and a project’s impact.

The Decision Criteria that did not make the top 8 are:

- Equity
- Opportunities for synergy

# Next Steps

Alexandria and ACPS engaged in discussions that resulted in a set of important Resources and Obstacles, Values and Guiding Principles, and Decision Criteria. The key themes defined in each exercise provide the foundation for the future collaboration between the two bodies and will help guide the decision making process for future projects and planning.

Moving forward, this document, and the Decision Criteria in particular, can be used by the two bodies 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. 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. Beyond the Recommendations, this document will help the two bodies know their needs and priorities and organize their efforts as they embark on new collaborations, partnerships, and new ways of doing business.

OPX recommends that a subsequent Vision Session be held to explore and further define the Task Force Recommendations. A second session will give the bodies the opportunity to develop supplemental tactics and define the specific areas that they will address to achieve overall strategic intent. The bodies will have the opportunity to complete the Comparative Evaluation Matrix, using the Decision Criteria from the first Vision Session, to score and prioritize future initiatives and tactics.

TACTICS/ RECOMMENDATIONS	DECISION CRITERIA							
	1 Urgency/ Priority	2 Cost	3 Mission Alignment	4 Complete Analysis	5 Return on Investment	6 Risk	7 Flexibility/ Resiliency	8 Community Engagement/ Input
Tactic #1 (example score)	+	-	+	○	+	-	+	+
Tactic #2								
Tactic #3								

+ Positive    - Negative    ○ Neutral

# Appendix A: Participants

This is the list of attendees who participated in the May 19<sup>th</sup>, 2018 Vision Session.

1. Tim Lovain (City of Alexandria)
2. Veronica Nolan (ACPS)
3. Paul Smedberg (City of Alexandria)
4. Del Pepper (City of Alexandria)
5. Christopher Lewis (ACPS)
6. Allison Silberberg (City of Alexandria)
7. Cindy Anderson (ACPS)
8. Willie Bailey (City of Alexandria)
9. Hal Cardwell (City of Alexandria)
10. John Chapman (City of Alexandria)
11. Ramee Gentry (ACPS)
12. Justin Wilson (City of Alexandria)
13. Steve Polo (Moderator-OPX)

# Appendix B:

# Vision Session Primer

**Alexandria City Council and Alexandria City School Board Vision Session**

**May 19, 2018**

## **AGENDA:**

- Introductions
- Outlining Resources and Obstacles to a Cooperative Approach
- Developing Guiding Principles and Values
- Building Decision Criteria

## **INTRODUCTION:**

Thank you for taking the time to be a part of this session and for your enthusiastic participation. Your ideas are very important to this process, and your input will be extremely valuable in the analysis work we are now beginning. This session is being 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 recommend Alexandria define its “Targeted New Reality” to clarify priorities for decision-making when considering how best to deliver capital projects and services.

The result of the session will be a decision-making guide that will help inform the vision for the future collaboration of the City of Alexandria and ACPS. This session will help ensure that each current and future team member is in step with the priorities and goals of Alexandria, and it will help set the stage for all future decisions and planning.

**Goals**

- Identify important resources and obstacles which encourage or hinder collaboration.
- Identify Guiding Principles and Values to guide the cooperative work of both the City and ACPS.
- Identify Decision Criteria for assessing alternatives and selecting appropriate options required to achieve the Targeted New Reality and future collaborative initiatives. Decision Criteria should be able to direct the elected bodies and staff on things such as CIP decisions, shared services, and collaborative efforts such as technology.

**RESOURCES / OBSTACLES**

- What two existing resources could be used to help facilitate effective collaboration? Some possible resources could be:
  - Engaged elected bodies
  - Collaborative staffs
  
- What two existing obstacles are hindering effective collaboration? Some possible obstacles could be:
  - Funding structure
  - Disparity in community involvement

Please come to the Vision Session with your own list of existing resources/obstacles affecting City and ACPS collaboration. Note that these may change for you during the discussion and that is welcomed!

**VALUES AND GUIDING PRINCIPLES**

We start with determining big picture values and guiding principles in order to tie all future decisions to this vision. What ideas will guide our approach to collective decision making? Some possible guiding principles could be:

- Advocate for each other
- Community dialogue
- Focus on results
- Embrace change
- Forge new paths

Please come to the Vision Session with your own list of what you may consider a value or guiding principle. Note that these may change for you during the discussion and that is welcomed!



**DECISION CRITERIA**

The Decision Criteria step provides a framework for assessing alternatives and selecting the appropriate option. Faced with concepts that have competing priorities, this exercise will give the group an opportunity to identify the criteria that is most important for assessing and selecting between the competing or coincident opportunities or concepts. Some possible Decision Criteria are listed below:

- Alignment with strategic plan
- Time to benefit
- Cost
- ROI
- Public support
- Impact/difference
- Political climate
- Risk
- Urgency

Please come to the Vision Session with your own list of what you may consider a value or guiding principle. Note that these may change for you during the discussion and that is welcomed!

**STRATEGY AND TACTICAL SCORECARD**

Ultimately, we will use this criteria to develop a chart like the one below to help score and prioritize future initiatives and tactics.

Tactics/ Recommendations	Decision Criteria					
	#1	#2	#3	#4	#5	#6
Tactic #1						
Tactic #2						
Tactic #3						
Tactic #4						
Tactic #5						
Tactic #6						

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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 write down your thoughts, ideas and questions and bring them to the meeting. Your active participation will ensure that the session provides the team with the most valuable information.

Thank you!

**The OPX Team**

**PROCESS MAP**

