



NEW HAVEN PUBLIC SCHOOLS

Operations Memorandum

To: New Haven Board of Education Finance and Operations Committee
From: Dr. Michelle Kelly-Baker, District Climate & Title IX Coordinator
Date: September 26, 2023
Re: Custom Insight
 2023-24 New Haven Public School Climate Survey

Answer all questions and have a representative ready to present the details of each question during the Finance & Operations meeting or this proposal may not be advanced for consideration by the full Board of Education.

Company Information		
Vendor Name:	Custom Insight, LLC	
Doing Business as: (DBA)		
Vendor Address:	750 Arrowhead Drive, Carson City, NV 89706	
Vendor Contact Name:	Bill Freund	
Vendor Contact Email:	bill@custominsight.com	
Is the contractor a minority or women owned small business?	No	
Agreement/Contract Information		
New or Renewal Agreement/Contract?	New	
Effective Dates: (mm/dd/yy) <small>Multi-yrs. require Board of Aldermen approval</small>	From 07/01/2023	To 6/30/24
Total Amount: <small>If Multi-yr. include yr. to yr. breakdown</small>	\$50,000.00	
Funding Source Name: Acct. #:	Title IVA 2023 2511-6291-56697-0000	
Contract #: <small>(Local or State)</small>		



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Key Questions:

1. What specific service will the contractor provide:

- Climate survey for up to 20,000 people
- Progress Checks (pulse surveys) to assess improvement in focus areas during the year
- Translation of the survey into five languages
- Postcard invitations/QR codes for all surveys
- Cellphone format for parent surveys

2. How was the contractor selected? **Attach appropriate supporting documents*

- Quotes
- Sealed Bid # _____
- Sole Source # _____
- RFP# __20230717_____
- State Contract #
- Exempt Professional
 - Accountant
 - Actuary
 - Appraiser
 - Architect
 - Artist
 - Dentist
 - Engineer
 - Expert Professional Consultant
 - Land Surveyor
 - Lawyer
 - Physician/Medical Doctor

3. If the vendor was selected through Solicitation (Bid/RFQ/RFP) process; answer the following:

a. Please explain how the vendor was chosen? **Attach Vendor Proposal*

The vendor was selected by use of a rubric system to evaluate the proposal.

b. Who were the members of the selection committee? *(Minimum 3 members required)*



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Dr. Michelle Kelly-Baker
Jessica Haxhi
Lemuel Cosme

4. If this is a renewal with a current vendor, has the vendor has met all obligations under the existing agreement/contract?

N/A

5. If this agreement/contract is a Renewal, has the cost increase? If yes, by how much? **Attach Renewal Letters*

N/ANo

6. If this new agreement/contract, has cost for service increased from previous years? If yes, by how much?

No.

7. Is this a service that existing staff could provide? Why or why not?

No. The existing staff does not have the manpower to develop, administer, analyze, and report out result for a district wide climate survey.



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Agreement/Contract Processing Checklist

To ensure timely processing of the submitted Agreement/Contract it is imperative to collect and provide all of the required documentation noted below and provide with submission to board.

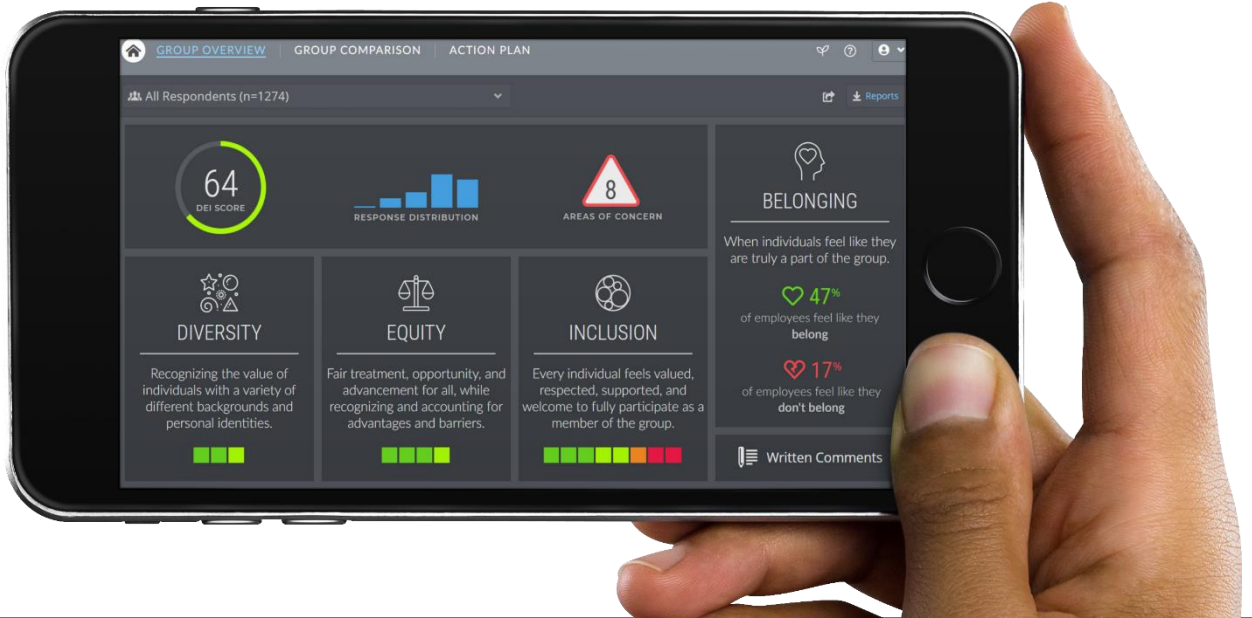
Forms/Documents are available in: Drive G:\F&O Agenda Minutes\Agreement Contract Checklist\2022-2023

1. Has this vendor performed service(s) in prior fiscal years?	
If Yes,	Vendor # _____
If No or New,	Vendor must provide completed W9
2. A quotes or proposal submitting regarding the agreement/contract.	
If RFP	Attach Vendor Submitted
Other	Copy of State Contract, Quotes, etc.
<p>3. <u>Certificates of Liability Insurance (COI) are required for ALL agreements/contracts, read the following and select the applicable Rider.</u></p> <p>It is the submitters responsibility to request the COI from the vendor and attach with submission; the COI from the Vendor <u>must match rider specifications outlined.</u></p> <p>Failure to obtain or incorrect COIs will be returned for revision and will delay its processing.</p>	
Rider 300	Professional Services – Onsite Umbrella; w/ Auto; w/ Workers Compensation
Rider 305	Professional Services – Onsite Umbrella; No Auto; No Workers Compensation
Rider 310	Professional Services – Onsite Umbrella; w/ Auto; No Workers Compensation
Rider 315	Professional Services – Onsite Umbrella; w/ Youth under 21
Rider 320	Professional Services – Offsite; No Auto; No Workers Compensation
Rider 325	Professional Services – Offsite; No Auto; No Workers Compensation; w/ Youth under 21
Rider 330	Professional Services – Offsite Attorney; No Auto; No Workers Compensation
Rider 335	Professional Services – Onsite; Physician/Dentist; No Auto
Rider 340	Professional Services – Onsite Physician/Dentist w/ Youth under 21
Rider 345	Professional Services – Onsite Temp Nurses
Rider 350	Professional Services – Cyber – Onsite



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Rider 355	Professional Services – Cyber – Offsite
4. The City of New Haven requires the information requested in the <u>Disclosure Affidavit</u> before any City agency, department, or city official seeking agreement/contract shall obtain them, notarized.	
Emailed Disclosures are acceptable.	



Climate Survey for New Haven Public Schools

(RFP: 2023-07-1852)

Prepared by



July 29, 2023

Confidential

Climate Survey for New Haven Public Schools

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Overview

Introduction

We understand that you are seeking assistance with your upcoming climate survey. Specifically, you want a vendor that can help with survey design, implementation, analysis, and reporting for all schools, teachers, staff, administrators, students, and families. More specifically, you want a vendor that can provide design, customer service, professional development, and workshops on survey creation, reporting, and results. Based on a thorough review of your requirements, we are confident that our solution would be a strong fit and you would be highly satisfied with our results.

During the past 20 years, CustomInsight has helped thousands of organizations capture and analyze valuable feedback from their employees. That includes many schools, some of which have also included feedback from students. We combine cutting-edge technology with proven methodology and deep expertise to deliver outstanding performance.

Our survey is anonymous, confidential, customizable, validated, and smart. We'll recommend survey items and questions for you, based on your situation and experience. All of our items are benchmarked and action-oriented, but you can also add your own items (e.g., from your previous surveys). At the end of the survey, an algorithm will ask a few additional questions that are tailored to each respondent, based on their current and previous ratings. These short-answer questions provide extra help where it's needed most, probing for deeper insights that are specific to your organization, and extracting examples of issues and recommendations for action.

Our quick and easy to understand reporting allows the feedback to be cascaded throughout the organization, giving leaders at all levels the ability to share results and follow up. We provide an intuitive interactive dashboard that automatically pinpoints top priorities for the whole organization and workgroups, using a variety of important factors (percentiles, driver, etc.). All our survey items have expert insight & advice, content we've produced to carefully guide you. In addition, using cutting-edge artificial intelligence, we summarize key themes from the written comments, and provide customized action plans, tailored to each dashboard user. They include relevant goals and tasks.

We offer a variety of benchmarks to facilitate comparison, both internally and externally. For example, we display percentile scores for all our survey items, to enable you to compare your results to over 1,500 organizations or to just the portion in your industry (i.e., Education). In addition, workgroups can view internal benchmarks, to compare their results to your organization as a whole, which is helpful for any custom items you add. And with trend features, you can also see how your results are changing over time—overall, at the workgroup level, at the survey item level, and more.

Our integrated Progress Checks enable you to easily monitor improvement in focus areas during the year, for the whole organization and for workgroups. These flexible pulse surveys can be launched by the survey administrator or any authorized dashboard user, for their own areas.

Team

Our founder and CEO, David Gutzman, will serve as the subject matter expert. He will recommend survey content, from the rating scale items to the short-answer questions. When the survey ends, he (or another expert that he has assigned) will provide your debriefs. During these meetings, which are

usually conducted remotely, we will present your results, highlight key insights, identify top priorities, share our recommendations, make sure you're comfortable using our interactive dashboard, and answer your questions. He has led the company continuously for over 20 years, and is based in Silicon Valley, California. Previously, he worked at a successful HR consulting firm, after graduating from Stanford University.

Our VP of Business Development, Bill Freund, will manage our relationship with you, focus on your success and ensure your satisfaction. He has been in this role at our company for eight years, and is based in San Francisco, California. Previously, he helped lead other successful Internet software companies, after starting his career at Microsoft and graduating with an MBA from Harvard Business School.

Our Client Service Director, Christine Ipolyi, will manage the project, ensuring your survey runs smoothly. She will help with the survey set-up and implementation. She has been in this role at our company for 15 years, graduated from the University of North Carolina at Chapel Hill, and is based in Florida.

Team Summary

Name / Position / Location	Role	Experience	Education
Dave Gutzman / Founder & CEO / California	Will advise regarding survey questions and will interpret the results of the survey.	22 years in role	Stanford
Bill Freund / VP of Business Development / California	Will oversee the relationship to ensure your survey's success and your satisfaction.	8 years in role	Harvard (MBA)
Christine Ipolyi / Client Service Director / Florida	Will be the project manager, setting up and deploying your survey.	15 years in role	UNC, Chapel Hill

Requirements & Capabilities

Survey Design

Requirements	Capabilities
Create five Climate Surveys for grades 5-12, including surveys for students, administrators, teachers, staff, and families.	We can create five climate surveys, for students, administrators, teachers, staff, and families.
Provide the ability for different questions to be given to at least two different grade-level bands: 5-8 and 9-12.	Different questions could be given to at least two different grade-level bands.
Provide access to pre-prepared questions and customized definitions.	We offer a library of survey items/questions, with benchmarks (which offer percentile scores compared to over 1,500 other organizations). We can also recommend survey items to use. Terminology and definitions can be customized for our items.
Offer the ability to develop and add customized NHPS questions and content.	You can add custom items/questions and content (e.g., Insight & Advice and links)
Offer translation drop-down into multiple languages, including Spanish, Pashto, Arabic, French, Mandarin, and 1 other. Vendor incurs translations cost for up to 6 languages. The ability to print each of the five languages school's surveys via Pdf format.	We can offer a translation drop-down in multiple languages, and we already offer our survey in a wide range of languages, including Spanish, French and Mandarin. We could provide the survey via PDF for all five languages so you could print it.
Survey includes text-to-speech ability for hearing questions and possible answers.	Our survey offers text-to-speech for hearing questions and possible answers. For each survey question, we can also offer sign-language videos, if you provide them.
Each staff member and administrator will need a one-time use passcode for the survey.	We can provide one-time passcodes.
Students must be able to log into the survey with their school ID numbers, provided by NHPS.	We can enable students to log into the survey with their school ID numbers.
Systems must be compatible with PowerSchool and Clever.	They could be compatible with PowerSchool and Clever, but it depends on what you're seeking to accomplish. We have experience creating single sign-on (e.g., with PowerSchool, one of our clients).
Provide links and QR codes to online surveys directing the user to a pulldown school menu.	We can provide links and QR codes to online surveys directing the user to a pulldown school menu. We can also email a unique link for each person that enables us to map their survey responses to pre-loaded demographic information. Finally, we could send survey invitations via text message (SMS).

Survey Implementation

Requirements	Capability
Mailing of postcards with QR codes and links to all families.	We could mail postcards with QR codes and links to all families. We have provided QR codes linked to our surveys to hundreds of organizations.
QR code, links, and paper mailing should be able to be sent divided by school (not just one for the whole district).	We could provide the QR code, links and paper mailing divided by school.
Surveys must be able to be printed at the school level by schools.	We could provide PDFs of the survey at the school level. We have provided many organizations with printable copies of the survey, including some organizations with thousands of respondents. We also offer a streamlined interface for entering information from the paper surveys.

Survey Analysis, Reporting, and Summary

Requirements	Capability
Provide a full summary of results for New Haven Public Schools (NHPS) website and 3-hours of workshop: (1) NHPS Executive Team, (2) Board of Directors, and (3) Citywide Student Council.	We can provide a full summary of the results for your website and 3 hours of workshops for the groups mentioned.
Provide access to the survey reporting platform for district, school administrators, and school’s leadership team.	We will provide access to the survey reporting platform for the district, school administrators, and school’s leadership team. You can provide dashboard users with all the results or a subset of them.
Provide a link for public access to the survey results, as well as a written summary of results for the public.	We could provide a link to a report of the survey results and a written summary of the results. The interactive dashboard is normally password-protected.
Provide a short video summarizing the survey results for students.	We can provide a short video summarizing the results for students.
Survey results links and data be the sole property of New Haven Public Schools.	You would own your data and results, and you would have access to your results indefinitely.

Customer Service & Professional Development

Requirements	Capability
Provide access to a dedicated service manager during all working hours.	You would have access to a dedicated service manager by phone and email during all working hours.
Provide bi-weekly meetings with service manager throughout the school year.	We could provide bi-weekly meetings with the service manager throughout the school year. This

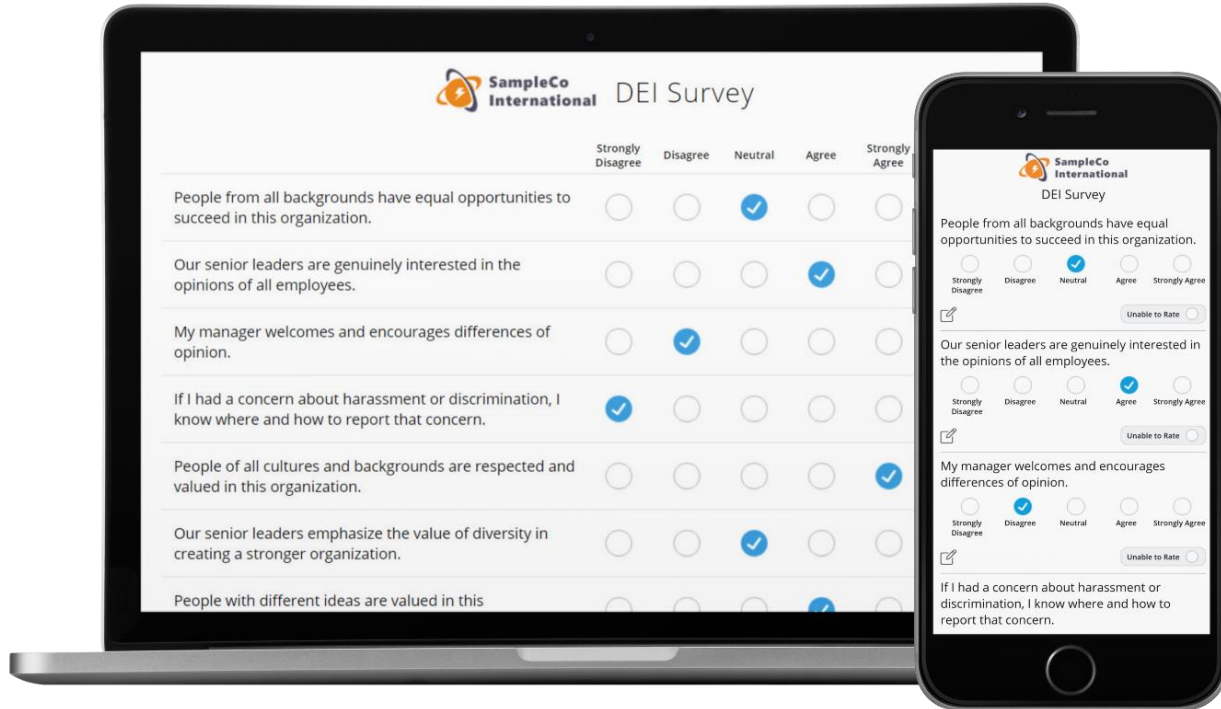
	person could ensure you're getting the most from our system.
Provide professional development, advising and training videos for administrators to be able to preview, access, and read results of the survey.	The dashboard is very intuitive and offers help pop-ups, but we also provide training videos and other support material in the help section.
Provide assistance to school administrators to create their own customizable action plans based on survey data.	The action plan of the dashboard provides customized recommendations, which includes goals and tasks, generated by cutting-edge A.I. These can be further customized in minutes if the dashboard user chooses to enter additional context.

Cost

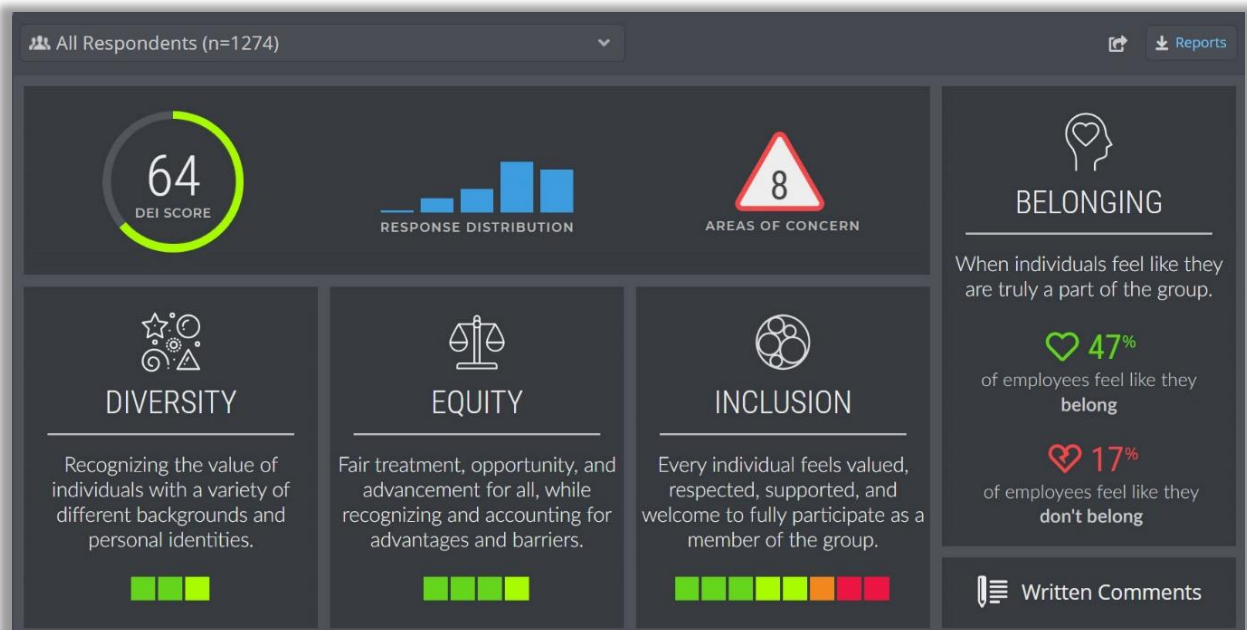
Climate survey for up to 20,000 people invited (plus \$2 per additional person invited)	\$40,000
Progress Checks (pulse surveys) to assess improvement in focus areas during the year	Included
Translation of the survey into five languages	Included
Postcard invitations to 10,000 recipients (plus \$1 per additional postcard)	\$10,000
Total	\$50,000

Sample Results


Smart Survey. Our survey items are action-oriented, and we automatically ask targeted follow-up questions tailored to each respondent to provide extra help where it's needed most. You can also add your own custom items and questions.



Interactive Dashboard. Our dashboard is an intuitive web-based analysis tool. It shows how your organization is performing on key success factors, compared to other organizations, and identifies your areas of concern.



Focus Areas. Based on an automated analysis of your feedback results, view areas of concern by survey item and demographic group—to focus your attention.




There are two types of *areas for concern*:

Survey items: Items with a percentile score of 56 or lower are categorized as potential areas of concern. The percentile scores for these items will be shown in red, orange, or yellow, depending on how low the score is.


Demographic groups: Demographic groups that have been defined as "traditionally disadvantaged" are listed as potential areas of concern if the scores for those groups are lower than scores for traditionally non-disadvantaged groups.

Areas of Concern - Survey Items

Harassment: If I had a concern about harassment or discrimination, I know where and how to report that concern.




17th
PERCENTILE




RESPONSE DIST


3.8
AVG SCORE



Harassment: The leaders of SampleCo have made it clear that harassment will not be tolerated in this organization, regardless of who you are.




33rd
PERCENTILE





RESPONSE DIST

3.8
AVG SCORE



Areas of Concern - Demographic Groups

1
25
50
75
99

RACE	Two or more	White/Caucasian
		
		

Group Comparison. Regardless of how organizations are doing overall, there are always issues lurking deeper. Our group comparison reports help you pinpoint problem areas, so you can take corrective action with greater precision.

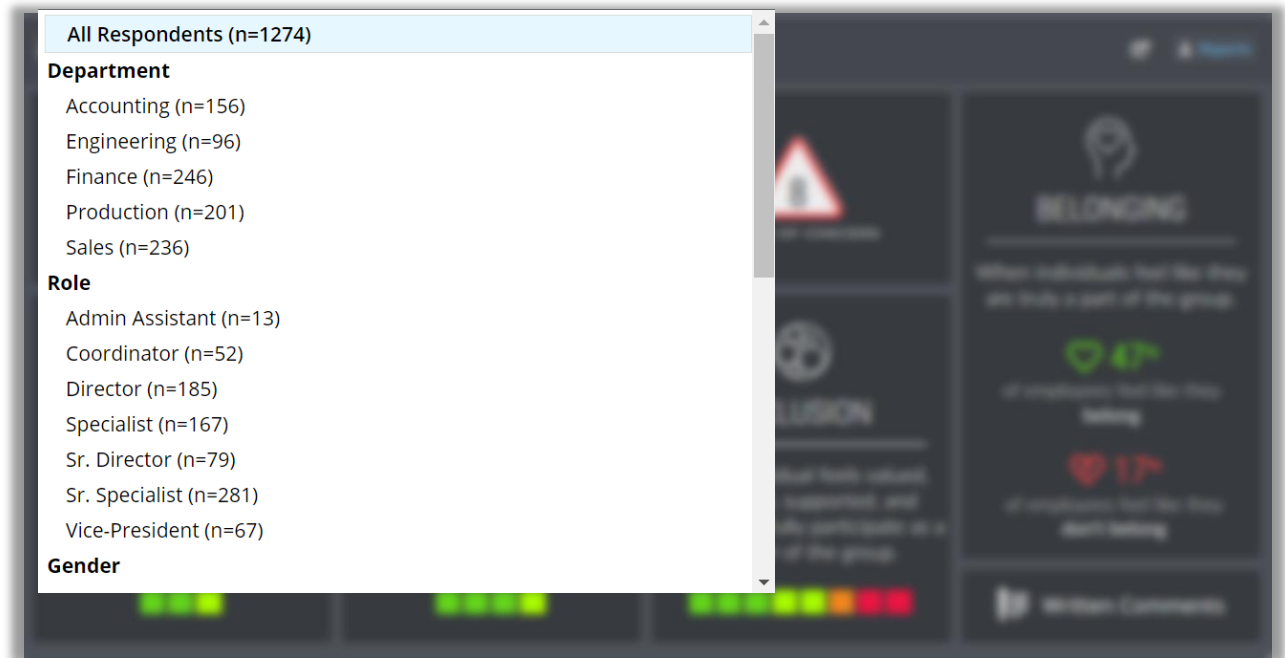
GROUP OVERVIEW | [GROUP COMPARISON](#) | ACTION PLAN
🌿 ? 👤

👤 Race
Scatterplot Gaps Cross-Tab Heat Map


RACE

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	D&I	# RESP	
Black/African American	Red	Red	Red	Yellow	Green	Red	Yellow	Orange	Orange	Red	Red	Yellow	Red	Red	Red	30	!	185
Latinx	Green	Green	Green	Yellow	Red	Green	Yellow	Green	Green	Green	Red	Yellow	Green	Green	Green	66		26
Prefer not to say	Green	Red	Red	Yellow	Green	Green	Green	Green	Red	Red	Green	Green	Orange	Yellow	Red	48	!	180
Two or more	Yellow	Red	Red	Green	Red	Green	Green	Green	Red	Red	Red	Red	Red	Red	Red	26	!	26
White/Caucasian	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Yellow	Yellow	Yellow	80		664

Filtering & Sharing. Filter your results by any of your groups (department, location, manager, etc.) and instantly share them with any employee.



Insight & Advice. Integrated insight & advice provides expert guidance to help you take corrective action for some of the survey items.

 **Insight & Advice**

"No man will make a great leader who wants to do it all himself or get all the credit for doing it." - Andrew Carnegie

INSIGHT AND ADVICE FOR:
Empowerment/ Autonomy: My manager gives me the freedom I need to do my job effectively.

Why is this important?

Simply put, micro-management is demoralizing. Giving staff autonomy to do their work their way, as long as it aligns with the organizational strategy, is a great way to lay the bases for a productive team. When managers micro-manage and fail to give employees freedom to do their jobs, authority to do their jobs, or the necessary training employees need to be effective contributors, engagement tanks as does productivity.

"Hire people who are better than you are, then leave them to get on with it. Look for people who will aim for the remarkable, who will not settle for the routine." - David Ogilvy

When people have a sense of ownership and authority over their work, they feel a greater responsibility and a greater desire to deliver the high-quality results. People who feel empowered and who have an adequate level of autonomy tend to be more committed, more dedicated, and more engaged in their jobs.

Strength/Success looks like...

- ✔ Managers are available for guidance and as a support system, as needed. They check in occasionally to see how the work is going and step aside to let the work get done.
- ✔ Managers delegate both tasks and authority over processes. Autonomy isn't just a tactical issue. It is about developing the

Action Planning. Using cutting-edge A.I., dashboard users can automatically receive customized action plans, comprised of goals and tasks that are tailored to their situation.

The screenshot shows a dashboard interface. At the top, there is a section titled 'Flagged Items (1)'. Below this, it displays 'Who: Department: Onlines Sales' and 'What: Empowerment/ Autonomy: My manager gives me the freedom I need to do my job effectively.' There are icons for 'convert to goal', 'share', and 'delete'. Below this is a section for 'Active Goals (1)' with buttons for 'get feedback' and 'create new goal'. The main content area shows 'Goal 1' with the text 'Make sure employees know what they need to do to succeed.' and a progress indicator '1/3 tasks complete'. Underneath, there are two tasks: 'Task 1: Make sure they have objectives.' (due 3/25/2017, completed 3/28/2017) and 'Task 2: Make sure they have metrics.' (due 10/2/2017, past due).

Progress Checks. To ensure improvements are on track, send shorter pulse surveys for any flagged survey items or goals to any employees at any time.

The screenshot shows a configuration screen for pulse surveys. On the left, there are two instructions: 'Select the type of feedback that you would like to receive' and 'Select which survey items to include'. The right side is divided into two sections: 'Progress Check (Pulse)' and 'ACTIVE GOALS'. The 'Progress Check (Pulse)' section has a description: 'Get feedback on your progress. Solicit ideas for how to adjust for greater impact.' The 'ACTIVE GOALS' section lists two items: 'Purpose and Direction: I know what I need to do to succeed at SampleCo.' (checked) and 'Communication: I have a clear understanding of SampleCo's strategic goals.' (unchecked). Below these are 'FLAGGED ITEMS' with two items: 'Respect for Management: The leaders of SampleCo really know what they are doing.' (checked) and 'Communication: I have a clear understanding of SampleCo's strategic goals.' (unchecked).