



**ILLINOIS ASSOCIATION
OF SCHOOL BOARDS**

Field Services

Edinburg CUSD #4

Setting District Goals & Direction Report

Saturday, February 27, 2016

facilitated by:
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MEMO from Illinois Association of School Boards

TO: Edinburg CUSD 4 Board of Education, Superintendent, Fred Lamkey, and all participants in the February 27, 2016 Goal Setting session.

FROM: Larry J. Dirks, Director, Field Services, IASB, ldirks@iasb.com

RE: Goal Setting and Planning Final Report

Wow, what a day! Thank you for the opportunity to work with all of you; Board, Administration, Staff and Community, as you apply yourselves to goal setting and planning for your district. It is my intention to invoice the district for \$900 which is comprehensive for all materials and time. This reflects a discount of \$100, since at least one of the Edinburg board members attended a Friday Pre-Conference workshop at the 2015 Joint Annual Conference in Chicago. An invoice will follow within a few days. I will include hard copies of this report to share with participants, as well as an electronic copy to the Superintendent which I think you will find valuable. As you begin to plan strategy you can "cut and paste" language, if necessary, and "fill in the blanks" for indicators. Highlighted areas in the follow-up report are spots where I have made (or I am suggesting) a change in wording or structure.

Each time that I engage in this work I am reminded of why I find this work fulfilling. It is the essence of board work. A school board's only job is governance. The Foundational Principles of Effective Governance state that a board is charged to sit in trust for the district's stakeholders and that the fundamental duties of governance obligate the board to:

1. Clarify the District Purpose.
2. Connect with the Community.
3. Employ a Superintendent.
4. Delegate Authority.
5. Monitor the District's Performance.
6. Take Responsibility For Its Own Effectiveness.

Boards can and do impact student achievement and success.

So far:

- We have considered the values and beliefs of this community with regards to education.
- We are currently reviewing mission.
- We have taken a critical look at district strengths, weaknesses, opportunities, and threats.
- We have identified goal areas in which to concentrate our efforts.
- We have written draft vision language (what does success look like) for those goal areas.
- We have written draft goal language (what will we do) for specific goals within those areas.
- We have prioritized the draft goals.

After that:

- The Mission Committee will assemble and create a draft mission statement to present to the board for approval.
- Action teams assemble. These teams are charged with two responsibilities:
 - To finalize vision and goal draft language to present for board approval.
 - These teams will follow the process as it unfolds. These teams are usually comprised of a board member, administrator, staff member, and a community member. The superintendent is often a member of all action teams by default. **The board and community members are not responsible for writing strategy, but they are present to help keep the process moving and to keep continuity of thought in tying strategy to our original conversations about values and beliefs.**

*It is important to remember that any committee that convenes to discuss district business, and then reports to the board of education, is subject to the Illinois Open Meetings Act.

- Board approves draft vision and goal language.
- Staff develops strategy to achieve the stated goals.
- Board approves final document.
- Document is printed and distributed.
- **Establish plans for annual review cycle.**

Please keep in mind that we are attempting to inculcate a process into the district. As I said during our work, this is a process not an event. By comparison, well intentioned district planning sessions are often viewed as an event. Perhaps some of you have been involved in prior work around district goals. Often, there are no established plans and no process to “check in” on those objectives (strategies) or to review and adapt those goals.

I am including a timeline for the completion of this work. This timeline is just a guideline and assumes the final result will be in the form of a public document.

I have often found that some district improvement language feathers nicely into the indicator slots, and, at the same time, provides a review and affirmation that day to day operations are aligning to the stated district goals.

The Goal Area of the report is color coded and the timeline is color coded for a reason. Green is purely a board responsibility, gray is a shared responsibility using the expertise of administration to help guide the board’s thinking, and blue is purely a staff responsibility. At some stage the board must allow the staff to present their plans to accomplish these goals in the form of measureable indicators. Certainly, the board approves the total work, but the staff should be responsible for the means. The board should focus on the ends. To help remind you of the respective roles I have included the “trust graphic” which helps to define those roles. I have included my notes regarding the draft language, and I have highlighted areas that I feel need rethinking.

When the time comes, and if you desire, I will be glad to introduce you to our production staff. They are superior craftsmen and will make your work come to life. If you recall, we shared a sample of their work during our session. In the meantime, I will be glad to provide editing and input on your objectives and indicators as time allows. Please feel free to contact me if you need any clarification on next steps.

Best regards,
Larry J. Dirks
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Superintendent Evaluation

Expectations
Superintendent Goals
Performance Measures in Contract
Job Description
Policy Manual

Student Goals

(staff work)

Classroom/Teacher Goals

(staff work)

Principal/Building Goals

(staff work)

Superintendent Goals

(staff work)

District Goals

(board work)

Vision

(board work)

SWOT
Analysis

Mission

(board work)

Values & Beliefs

(board work)

I. Core Values and Beliefs (We believe.....)

Our first step was to identify the core or underlying Values and Beliefs. These should be statements that tell us **why we want** to make this journey.

Regarding **Students and Learning**, we believe...

- Students should value learning and respect their school community.
- Students should have a quality education in a safe and productive learning environment.
- Students with a variety of interests should be served.
- Students need to graduate prepared for college, work force, etc.

Regarding **Teachers and the Teaching Process**, we believe...

- Teachers need the following instructional supports:
 - Strategy
 - Accountability
 - Improving
 - Freedom to teach.
- Teachers need the following resource supports:
 - Professional development/further education.
 - Financial time.
 - Healthy environment.
 - Instructional resources.
 - Respect/authority.

With respect to the **District/Community Responsibility** to each other, we believe...

- Communication with each other:
 - Clear communication between the district and the community.
 - The opportunity to make suggestions and concerns.
 - Loyalty and communication.
- Support for each other:
 - For all needs to be met.
 - Financial support to meet those needs.
 - Moral and physical support.
 - Parental accountability for education and behavior.
- Responsibility to each other:
 - To provide resources for students and staff.
 - Prepare for the future of students/college, other.
 - Attentive to, and reflective of, community values.

Indoctrinating Values into Policy:

The entire Values discussion should be distilled into a few core values that are reflective of all groups and adopted into policy. One example of this might be (but using your own words):

Whereas we believe:

- that expectations should be high and learning is lifelong;
- that the purpose of public education is to prepare young people to be responsible, productive members of society;
- that team learning and critical thinking skills are important to individual success;
- that learning should take place in a safe, healthy and positive environment;
- that all stakeholders have rights, roles, and responsibilities for which they are accountable;
- that teachers and good teaching practices are vital to the success of our students and our schools;
- that professional development opportunities are necessary for teachers to be able to implement more effective teaching opportunities;
- that the district is responsible for providing its programs, curriculum, and services in a fiscally responsible manner;
- that the success of our schools depends upon a partnership among parents, the community, the board and the staff;
- that a successful partnership between stakeholders requires communication and trust.

Another example:

We believe in:

- Educating the whole child within a safe nurturing environment
- High educational standards
- Maintaining competent leadership and staff
- Close personal relationship between the school and the community
- Maintaining a balanced budget with close monitoring of finances

And finally one more example:

We believe in, and value:

- A culture of excellence, accountability, and integrity for all stakeholders
- A quality education for all students that ensures equitable learning
- An environment that is safe and nurturing, where each student is well-supported
- Highly-qualified and educated faculty and staff members
- Diversity and change to be embraced in an inclusive educational community.
- Continuous improvement for the entire learning system.
- Strong connections among home school and community through pride and encouragement.
- Fiscal responsibility.

II. Mission Review

Based on our beliefs, our mission clarifies our unique purpose by trying to answer the question: "What benefits do we want to provide and to whom are we trying to provide those benefits? And at what cost?" Mission tells us **why we need** to make this journey.

Edinburg CUSD #4

Mission Statement:

"The Staff, Faculty, and Administration of the Edinburg School System are committed to producing globally competitive citizens who are prepared for life in the twenty-first century and who are lifelong learners. We seek to enhance and promote education, and to provide a safe and positive environment for all students."

Mission Statement Review:

I thought we had good discussion around mission statements. There was not a sense of ownership in the room that this was our mission statement. Mission statements by their nature should begin to identify what needs the district is trying to fill and for whom. There was consensus within the group that further work on a district mission statement would be valuable, as this board and administration carve out something that becomes their own flag to carry, and to pass along. To that end, a committee of Margaret S., Jodi V., David L., Ron M., Amanda D., will create a draft mission statement within 30 days for board review, with the hope of final approval by the board within 60 days.

We began the draft process by identifying some benefits that might percolate from the values and beliefs statements. We did this by asking the question: "Based on what we've said is important to us in values and beliefs, how might that translate into articulated benefits?"

Possible identifiable benefits residing within the Values and Beliefs statements:

- ◆ Preparedness
- ◆ Continued education.
- ◆ Safe, positive environment.
- ◆ Enhance, promote education.
- ◆ Globally competitive.

To whom:

- ◆ All students, staff, and community.

What's missing?

- ◆ Respectfulness

As boards turn over it is important to know that this statement has at least been reviewed and is "owned" by the current board. I believe it is important to remember that the conversations and process that lead to the mission statement are as important as the words that appear on the page.

III. SWOT Analysis

Student Achievement

Positives:

- ◆ Atmosphere
- ◆ Teacher/student ratio
- ◆ Student achievement
 - College/trade school bound
- ◆ Strong early childhood program.
- ◆ Co-op of key services.

Negatives:

- ◆ Curriculum/instruction:
 - Lack of electives.
 - Lack of data driven instruction.
- ◆ District wide assessment.
- ◆ Low student achievement.
- ◆ Student behavior:
 - Lack of discipline and respect.
 - Lack of student involvement.

Programs/Curriculum/Services

Positives:

- ◆ Hard-working, dedicated staff that is willing to change and try new things with available resources; passionate!
- ◆ CACC and Lincoln Land
- ◆ Adequate curriculum with opportunity for growth.
- ◆ Positive environment
- ◆ Small class size

Negatives:

- ◆ Lack of funding for art, music, Spanish, etc.
- ◆ Technology issues (lack of and slow).
- ◆ Lack of resources for stronger, updated curriculum.
- ◆ Social/emotional resources needed.
- ◆ Dual credit courses are not available.
- ◆ Principal spread too thin.

Facilities/Physical Plant

Positives:

- ◆ Well-kept
- ◆ Paid for
- ◆ Nice gym
- ◆ Plenty of space
- ◆ One building – 3 schools
- ◆ Science lab

Negatives:

- ◆ Old/aging building
- ◆ Lacking/outdated resources.
- ◆ Needs A/C.

District Financial Condition

Positives:

- ◆ Good financial shape compared to other districts.
- ◆ Doing more with less.
- ◆ Leadership making tough decisions.
- ◆ Route 29 project

Negatives:

- ◆ Enrollment
- ◆ Aging community and tax base.
- ◆ State funding
- ◆ State mandated consolidation
- ◆ Lack of funding results in limited resources.
- ◆ Unfunded mandates.

District/Community Relationship

Positives:

- ◆ Passion for the future of our school
- ◆ Increased community involvement
- ◆ Strong group involvement
 - Church
 - Banks
 - All businesses, etc.

Negatives:

- ◆ Continued increase of community involvement.
 - Community organizations
- ◆ Parent involvement:
 - Lack of discipline
 - Engagement at home
- ◆ Communication:
 - Website
 - Social media issues

Goal Area – Student Success

Vision/Goal – Graduates of Edinburg are successful in life after graduation.

Goal/Objective 1: Improved curriculum. (1@238)

Indicator 1.1: _____

Goal/Objective 2: Guidance for career and life choices. (7@152)

Indicator 2.1: _____

Goal/Objective 3: More use of outside resources. (13@121)

Indicator 3.1: _____

Goal/Objective 4: Continual education for teachers to provide the best learning environment for all students. (9@150)

Indicator 4.1: _____

Larry’s notes: It’s my opinion that Goals/Objectives 1, 2, and 3 could use a bit more “ends” language. In other words, as the indicators are written, it would help to ensure that we understand the board’s definition of improved curriculum. I think we all know what needs to be improved, but let’s make sure we can answer “to what end?” satisfactorily.

Action Team Notes:

Goal Area – Student Success – Action Team

- Board: Margaret
- Administration: Michelle
- Staff: Jennifer, Jodi
- Community: Scott, Jaimie H.

Goal Area – School Climate/Culture

Vision/Goal – Develop a productive, safe, culture that reflects the values of professionalism, civility, teamwork, respect, curiosity, and learning.

Goal/Objective 5: Provide positive reinforcement, respect by all stakeholders, and accountability for all. (2@179)

Indicator 5.1: _____

Goal/Objective 6: Provide a clear crisis management plan. (11@124)

Indicator 6.1: _____

Goal/Objective 7: Communicate values in every aspect of school. (8@152)

Indicator 7.1: _____

Larry's notes: We had a good discussion about this section, mostly around how to phrase Goal/Objective 5, and having a priority rank of "2" means that this is very important to everyone, so we need to get it right. I struggled with how to reflect Goal/Objective 5 in appropriate "ends" language.

Action Team Notes

Goal Area – School Climate/Culture – Action Team

Board: Cindy
Administration: Michelle
Staff: Amanda
Community: Gaylord

Goal Area – Facilities

Vision/Goal – The district will maintain facilities that are safe, clean, aesthetic and conducive to learning.

Goal/Objective 8: Prioritized capital project list, (4@166)

Indicator 8.1: Air conditioning/heating (HVAC)

Indicator 8.2: Safe/secure building

Indicator 8.3: Improve/update technology

Goal/Objective 9: Reevaluate facility use. (14@74)

Indicator 9.1: _____

Larry's notes: I have shuffled some of the specific items under Goal/Objective 8 into indicator slots.

Action Team Notes

Goal Area – Facilities – Action Team

Board: Adam
Administration: Fred
Staff: Zach
Community: Mike B, Mike H., Doug F.

Goal Area – Stakeholder Relations

Vision/Goal – Stakeholders are involved in the communication of activities and functions of the school. Being engaged, serving on school committees and positively supporting the school reputation.

As a result of good two-way communication, stakeholders are involved and engaged in the activities and functions of the school, positively supporting the school reputation.

Goal/Objective 10: Keep open communication. (5@166)

Indicator 10.1: Facebook Page (school), website, newspapers, and advertisements at local businesses

Goal/Objective 11: Consistent/positive community involvement with the school. (3@167)

Indicator 11.1: _____

Larry's notes: I was not happy with the flow of the vision language for this goal area, so I reworked it some. The original language is still there for comparison. I have shuffled some of the items under Goal/Objective 10 into indicator slots as well.

Action Team Notes

Goal Area – Stakeholder Relations – Action Team

Board: Melinda
Administration: Michelle
Staff: Nona
Community: Aaron

Goal Area – Financial Strength

Vision/Goal – Maintain financial recognition status without reduction in programs, resources or staff, while providing maximum services.

Goal/Objective 12: Seek alternate sources of income/savings, i.e., grants, donors and volunteer labor. (10@126)

Indicator 12.1: _____

Goal/Objective 13: Build and maintain healthy cash reserves. (~~wise spending~~) (6@154)

Indicator 13.1: _____

Goal/Objective 14: Increase revenue money through larger enrollment. (12@124)

Indicator 14.1: _____

Larry's notes: Highlighted edits.

Action Team Notes

Goal Area – Financial Strength – Action Team

Board: Ron
Administration: Fred
Staff: Jodi
Community: Mark

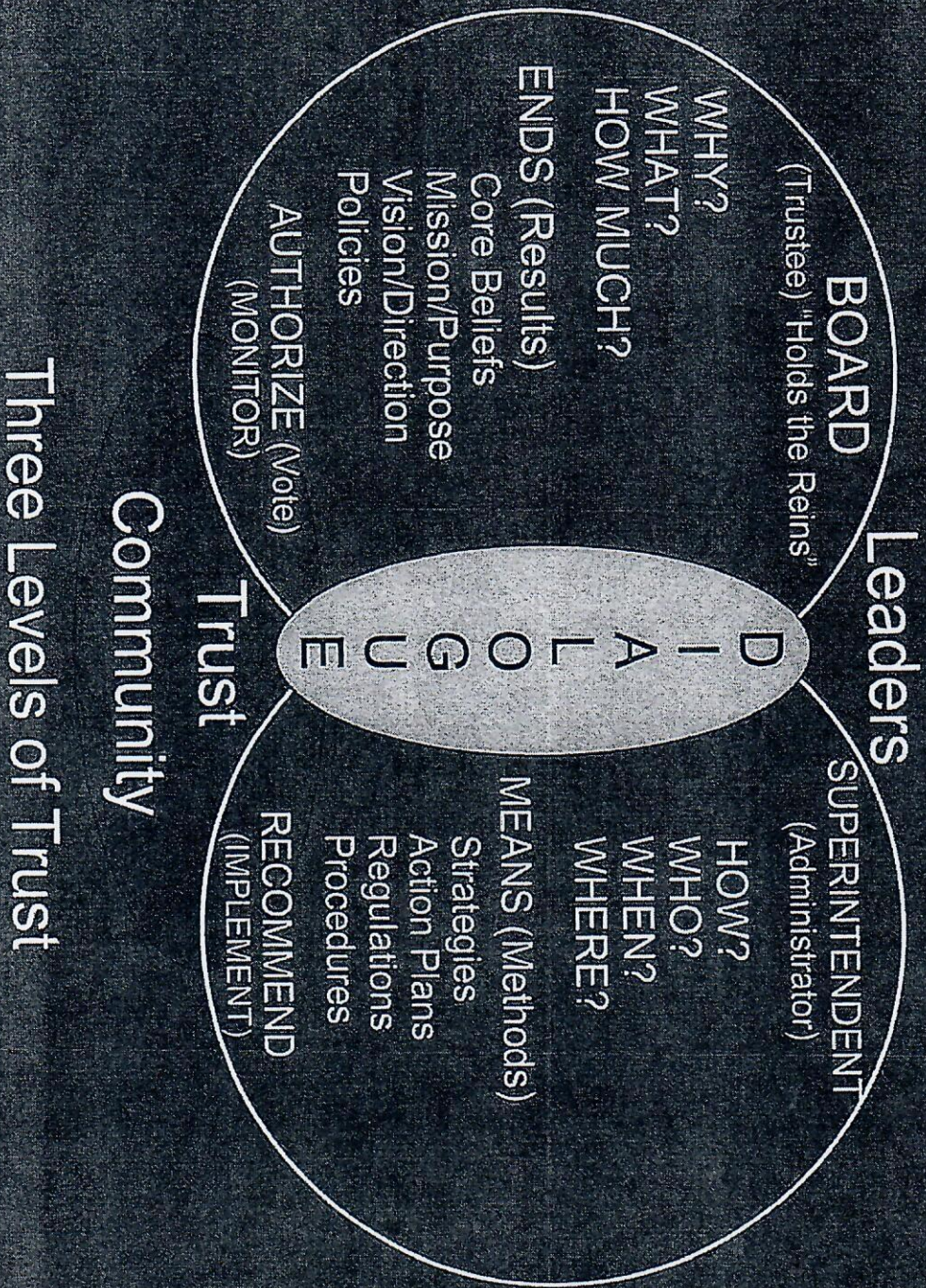
Months 2 and 3 (Month 2 if 2 meetings held in one month)	2 months or 2 board meetings	Board meets to review the Draft #1 by asking the questions: <ul style="list-style-type: none"> • Is this what we intended or wanted to say? • Could we state these ends more clearly? • What are we missing? • Are the ends specific, measurable, attainable, results-oriented, time-bound? • Have any potential negative consequences been identified? 	Board Superintendent Others as determined by the board/superintendent
	Within 1 week of final review session(s)	Revise, as necessary, incorporating concepts/language based on the consensus of the group. Distribute Draft #2 to board and others as determined by the board/superintendent	Superintendent
Month 4 (Month 3)	Next board meeting	Review Draft #2 and prioritize ends.	Board Superintendent Others as determined by the board/superintendent
Month 5 (Month 4 or 3-if two meetings held in month)	Next scheduled board meeting	Place final draft on board agenda for adoption of mission, vision, beliefs/values, and/or goal statements as policy (See policies 1:30 School District Philosophy, 3:10 Goals and Objectives to Guide the Administration and 3:15 District Culture) Set date for completion and presentation of staff Action Plan. (3 months)	Board Superintendent
Months 6-8 Months 5-6 or Months 4-5	During the 3 months following adoption date	Superintendent takes the plans to the administrative team and other staff for development of an Action Plan (see attached) that will answer the questions: <ul style="list-style-type: none"> • What will be done? • When it will occur? • What measurements will be used? • Who will be responsible for 	Superintendent Administration Staff

Months 2 and 3 (Month 2 if 2 meetings held in one month)	2 months or 2 board meetings	Board meets to review the Draft #1 by asking the questions: <ul style="list-style-type: none"> • Is this what we intended or wanted to say? • Could we state these ends more clearly? • What are we missing? • Are the ends specific, measurable, attainable, results-oriented, time-bound? • Have any potential negative consequences been identified? 	Board Superintendent Others as determined by the board/superintendent
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Months 6-8 Months 5-6 or Months 4-5	During the 3 months following adoption date	Superintendent takes the plans to the administrative team and other staff for development of an Action Plan (see attached) that will answer the questions: <ul style="list-style-type: none"> • What will be done? • When it will occur? • What measurements will be used? • Who will be responsible for 	Superintendent Administration Staff

		<p>implementation and monitoring results?</p> <ul style="list-style-type: none"> • How it will be accomplished? <p>Produce Action Plan Draft #1 based on compiled information; Distribute for staff review and make changes as needed (Draft #2); Staff meets to ensure alignment of Action Plan Draft #2 with board priorities and to reach consensus on final plan Final plan prepared for board review</p>	
Month 9 Month 7 or Month 6	Next board meeting(s)	<p>Approve plans and incorporate into policy 3:10 Goals and Objectives to Guide the Administration. Develop monitoring process and schedule:</p> <ul style="list-style-type: none"> • Answers the question: How will we know that we are making progress • Develop annual monitoring calendar <p>Aligns budget with priorities of district, currently and in the future.</p>	Board Superintendent
	Next week	Dissemination to staff and community	Superintendent
	Ongoing	Superintendent ensures that all staff knows what the district ends are and have plans to further the ends of the district. Building, program, course, classroom, and support services activities align with district ends.	Superintendent Administrators Staff
	Ongoing Monthly	Board and Superintendent/staff monitor progress. Monthly board meeting agenda reflects time spent monitoring district ends	Board Superintendent Administrators Staff Initial planning committee Others

Depending upon how many times in a given month the Board meets, the timetable from goal setting to action plan completion can be completed in 6 to 9 months.

Stewards for the Community



Edinburg CUSD 4
Saturday, February 27, 2016

Goal	P# Rank	P Score	Melinda Barton	Ron Moreland	Margaret Skaggs	Adam Swinger	Cindy Tapscott
1. Improved curriculum.	238	13	10	12	13	13	13
2. Guidance for career and life choices.	152	11	10	8	9	6	7
3. More use of outside resources.	121	8	0	13	4	0	5
4. Continual education for teachers to provide the best learning environment for all students.	150	9	6	9	5	4	6
5. Provide positive reinforcement, respect by all stakeholders, and accountability for all.	179	10	13	7	7	3	8
6. Provide a clear crisis management plan.	124	3	3	2	4	11	8
7. Communicate values in every aspect of school.	152	6	10	8	1	11	13
8. Air conditioning/heating (HVAC), prioritized Capital Project list, improve/update technology, a	166	3	7	2	7	7	5
9. Re-evaluate facility use.	74	0	4	0	2	3	3
10. Keep open communication.	166	6	8	8	2	9	10
11. Consistent/positive community involvement with the school.	167	8	8	9	6	8	9
12. Seek alternate sources of income/savings, i.e., grants, donors and volunteer labor.	126	3	1	4	8	1	4
13. Build a healthy cash reserve and maintain (wise spending).	154	9	3	3	11	5	4
14. Increase money through larger enrollment.	124	2	6	6	12	10	0

Edinburg CUSD 4
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Goal	P# Rank	P Score	Melinda Barton	Ron Moreland	Margaret Skaggs	Adam Swinger	Cindy Tapscott
1. Improved curriculum.	1	238	13	12	12	13	13
5. Provide positive reinforcement, respect by all stakeholders, and accountability for all	2	179	10	13	7	7	3
11. Consistent/positive community involvement with the school.	3	167	8	8	9	6	8
8. Air conditioning/heating (HVAC), prioritized Capital Project list, improve/update tech	4	166	3	7	2	7	7
10. Keep open communication.	5	166	6	8	8	2	9
13. Build a healthy cash reserve and maintain (wise spending).	6	154	9	3	3	11	5
2. Guidance for career and life choices.	7	152	11	10	8	9	6
7. Communicate values in every aspect of school.	8	150	6	10	8	1	11
4. Continual education for teachers to provide the best learning environment for all stu	9	126	3	1	4	8	1
12. Seek alternate sources of income/savings, i.e., grants, donors and volunteer labor.	10	124	3	3	2	4	11
6. Provide a clear crisis management plan.	11	124	2	6	6	12	10
14. Increase money through larger enrollment.	12	124	8	0	13	4	0
3. More use of outside resources.	13	121	0	4	0	2	3
9. Re-evaluate facility use.	14	74	9	1	1	3	3