



# STRATEGIC RESET PLAN

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# Strategic Reset Plan



## Contents

Strategic Reset Plan Executive Summary .....	2
Introduction .....	2
The Strategic Reset Framework .....	3
Strategic Reset Plan Components – Mission Priorities .....	3
Strategic Reset Plan Components – Transformation Drivers .....	5
Executive Summary Conclusion .....	5
Introduction .....	6
Reset, Recovery, and a New Trajectory .....	7
Goals, Process, and Timeline .....	8
Strategic Reset Framework .....	9
Stakeholder Engagements .....	10
Plan Components – Mission Priorities .....	11
Re-Imagined Teaching and Learning Program .....	11
Safe and Welcoming Schools .....	14
Facilities Master Planning Program .....	18
Redesigned Community Connectedness Program .....	22
Comprehensive Funds/Resource Management .....	25
Plan Components –Transformation Drivers .....	29
Leadership and Organizational Development .....	29
Workforce Modernization and Sustainability .....	31
Data Leadership and Management .....	34
IT Modernization .....	42
Strategic Reset Plan – Funding .....	48
General Overview .....	48
Strategic Reset Plan   ESSER III Alignment .....	49
Funding Conclusion .....	49
Strategic Reset Plan – Plan Revision, Execution, and Progress Monitoring .....	50
Conclusion .....	53
Appendix – Strategy and Project Listing .....	54
Mission Priorities .....	54
Transformation Drivers .....	56

# Strategic Reset Plan Executive Summary

## Introduction

Over the past several years significant changes and events, from internal senior leadership to a global pandemic, have necessitated changes to the ways in which the Peoria Unified School District Governing Board and Administration establish strategic vision, direction, and plans. In February of 2018 the Peoria Unified Governing Board directed the newly appointed Interim Superintendent to begin development of a new Strategic Plan and process to provide clear strategic direction and to institutionalize strategic planning within the district. As an important first step in development, the Board and district leaders established these four Strategic Perspectives, which collectively are the lens through which the community judges the district's performance:



Strategic Perspectives

- Student Success
- Safety and Well-Being
- Steward of Resources
- Community Connection

The principles that follow from the Strategic Perspectives are at the core of the work the district has done to develop its strategic planning program, including this 2022-2024 Strategic Reset Plan.

Recognizing that the nation, our local community, and indeed the challenges facing PK-12 education overall have permanently changed the education landscape, the Superintendent and Cabinet began considering how the district would best approach post-pandemic challenges and lasting changes in PK-12 education, especially as they will impact Peoria Unified. In that process the team clearly recognized that while recovery from learning disruption is essential, recovery cannot simply mean returning to where we were as a district prior to the pandemic's onset. Thus, the Superintendent challenged his leadership team in February of 2021 to transform Peoria Unified into a district that can "claim its seat at the head of the table for state and national leadership in PK-12 education".

Given that challenge, the Superintendent and his leadership team subsequently embarked in March of 2021 on development of a new Strategic Reset Plan that addresses the need to both recover and execute a major reset of the district's vision and direction. The Superintendent's vision for getting on a "new trajectory" and ultimately achieving the goal of national PK-12 leadership comprises the following six components:

- We will make student-centered, data-driven, and shared decisions.
- We will be a highly effective professional learning community.
- We will ensure that every student and employee is known, valued, cared for, and challenged.
- We will be a highly trained and modern workforce.
- We will communicate effectively.
- We will be recognized as a community, state, and national leader in PK-12 education through greatly increasing levels of student achievement.

With that vision in place, district leadership established two high-level goals for the new Strategic Reset Plan:

1. Develop and obtain approval for a three-year plan that will achieve the following:
  - a. Recover from COVID-19 academic and operational disruptions.
  - b. Transform Peoria Unified to a new, re-imagined state that will meet the post-pandemic needs of our 21<sup>st</sup> Century students and community.
2. Develop and implement ongoing processes for:
  - a. Progress monitoring and oversight to ensure successful execution of the plan.
  - b. Annual updates and appropriate adjustments to the plan.

Commencing in March of 2021 we began execution of a four-phase strategic planning process that ultimately involved dozens of staff and considered input from literally thousands of community members. The four phases of the process are:

- **Reflect:** Discuss and determine what has transpired during the pandemic and prior years, what we have learned about our strengths and weaknesses, what the new year and beyond will bring, and how we should approach planning for that future.
- **Re-Imagine:** Envision and design a new Peoria Unified that is fully recovered and transformed into an institution able to meet the post-COVID demands of the 21<sup>st</sup> Century.
- **Restart:** Develop a three-year plan for implementing the strategies and initiatives designed to create our re-imagined future. Develop a progress monitoring process and an annual plan revision process that is integrated with our existing Budget Development and New School Year processes.
- **Rebuild:** Successfully execute those strategies/initiatives and annually review and revise the plan as part of the annual new year planning cycle.

With Governing Board adoption of the Strategic Reset Plan, we complete Restart and enter the Rebuild Phase.

### The Strategic Reset Framework

The primary outcome of the Re-Imagine Phase was the Strategic Reset Framework, which in essence is an integrated set of program components, each containing strategies designed to meet the Strategic Reset Plan goals. The framework's components are arranged in two groups, or categories, of plan components:

- **Mission Priorities (MP):** Each MP describes a program that is a vital part of the Peoria Unified mission. Collectively, the MPs and the strategies and projects they contain represent and address the highest priority mission programs within the Strategic Reset Plan.
- **Transformation Drivers (TD):** Each TD refers to a district program or function that provides capabilities and capacity in support *all* the Mission Priorities. Further, and equally importantly, each TD contains strategies and supporting projects that are designed to *transform* the ways in which we work to accomplish each Mission Priority.

There are five Mission Priorities and four Transformation Drivers, each of which specifies one or more strategies with supporting implementation projects. These nine plan components are summarized below and are described in detail in the full Strategic Reset Plan document.

### Strategic Reset Plan Components – Mission Priorities

#### Re-Imagined Teaching and Learning Program

Transforming Peoria Unified into a re-imagined district that is prepared to meet the post-COVID challenges of the 21<sup>st</sup> Century requires us to transform our teaching and learning practices in the classroom, including choices for in-person and virtual classes at all grade levels, attention to common expectations, professional development for teachers in the use of technological skills and district resources, interventions and extensions to address disruption in learning and student growth, and use of data to determine small groups for optimized instruction.

This transformation also requires best-practice research and consideration of new curriculum and academic programming in the grade level bands of PK-5, 6-8, and 9-12 in core and elective opportunities for students.

#### Safe and Welcoming Schools

Safety and Well-Being is one of the four Strategic Perspectives that have formed the foundation of the district's strategic planning efforts since 2018. While much has been accomplished in this area since then, much work remains to achieve the highest levels of safety and emergency preparedness expected by the district and our community. In addition to safety and emergency preparedness, district leadership is committed to the belief that *welcoming* schools are not only important to the health and well-being of students and staff, but also vital to students' academic achievement.

### Facilities Master Planning Program

As Peoria Unified works to transform itself into a high-performing, 21<sup>st</sup> Century-ready school district, it is important that we develop and maintain a long-range Facilities Master Plan to ensure that all students, staff, and visitors are accommodated in facilities that are safe, appropriate, welcoming, and conducive to successful teaching, learning, and working. This includes continuing the work of the Superintendent's Facilities Master Planning Committee, which met several times last school year to examine the possibility of repurposing some schools for identified future needs within the district. Additionally, the Master Plan must consider all available data regarding demographic trends, ensuring that as the district continues to both grow and shift its population centers, and that new facilities can be planned and constructed to meet those evolving needs. Further, as the district considers near and long-term needs for schools, the plan will also consider Transportation, Food Services, and other support departments so that those important services can continue to be effectively and efficiently provided to students as necessary parts of the full accommodation of our students.

Finally, in keeping with the Stewardship of Community Resources Strategic Perspective, the plan will ensure that Peoria Unified schools and administrative facilities are planned, built, and maintained in the most cost-effective and environmentally responsible manner possible.

### Redesigned Community Connectedness Program

The district's connection to the community is founded in a strong focus on transparency, integrity, and collaboration for the purpose of building community trust and confidence. Clear communications among teachers, school leaders, students, and families are required to best support students and to drive learning and achievement. Further, there are opportunities to build community partnerships with the local business community and higher education to further focus on student learning and growth. As the district redesigns its community connectedness program to help drive student achievement, there will be a strong focus on data to ensure communication in support of all priorities of the district is as effective as possible.

### Comprehensive Funds/Resource Management

The Comprehensive Funds and Resource Management Mission Priority is focused on ensuring that the other Mission Priorities and Transformation Drivers have the resources they need to be successful. To this end, a primary task of this Mission Priority is evaluating the way we budget and fund our schools, programs, and district operations.

This component includes a transition from our current incremental budgeting process to a program-driven hybrid budget model. This model will focus on allocating resources partly on a recurring program basis as well as periodically evaluating the success of the organization's new or existing programs to optimize resource allocation decisions.

To support the program evaluation efforts, we will need to invest in additional data analysis resources and staff training. These resources will assist us in optimally managing district resources and continuing to be effective stewards of the resources made available to us by our community.

Due to its strategic significance, this Mission Priority also has a clear focus specifically on funding and financially sustaining a modernized and competitive compensation model. Our workforce drives the success of all district initiatives; therefore, the district must be able to attract, grow and retain the most effective workforce possible to ensure success in meeting the district's strategic objectives. The comprehensive funds and resource management Mission Priority works to make that possible.

## Strategic Reset Plan Components – Transformation Drivers

### Leadership and Organizational Development

A fundamental strength in any large organization is found in the extent to which its leaders embrace ownership and accountability for decisions they make. During the Reflect Phase of the Strategic Reset Plan process the team determined that we should consider improvements to the mechanisms and leader development processes by which we set clear expectations and hold leaders accountable for meeting them. At the same time, the discussions suggested that implementing such practices as facilitated leadership and shared decision-making, along with strengthening the culture by which leaders take full ownership of the decisions they make could result in substantial improvements to school and district outcomes.

Overall, to meet our goal to “transform Peoria Unified to a new, re-imagined state that will meet the post-pandemic needs of our 21<sup>st</sup> Century students and community”, a major priority for the district is to develop and sustain a full and evolving team of leaders who embrace responsibility and student-centered decision-making and who possess the skills and aptitudes necessary to generate the innovations and creativity required to meet that goal.

### Workforce Modernization and Sustainability

The transformative nature of Peoria Unified’s Strategic Reset Plan clearly requires a workforce capable of initiating and sustaining these significant changes. Such a workforce requires 21<sup>st</sup> Century skills and capacity for innovation and creativity. Rapidly changing needs further requires a modern organization structured for flexibility and nimbleness. The Strategic Reset Plan contains several strategies and projects designed to continue this work.

### Data Leadership and Management

The Superintendent’s transformative vision for Peoria Unified includes the direction that we maximize making student-centered, data-driven decisions to drive improved outcomes. Every component of the district’s Strategic Reset Plan includes work and resources designed to use high-impact data and analytics to not only recover but to fully transform the district.

Achieving the goal of effective and safe use of data requires development of district-wide processes, capabilities, and resources, as well as support for each of the specific Strategic Reset Plan strategies and projects. Therefore, the work required by this plan component is geared toward specific supports to the district’s highest priority initiatives as well as district-wide support for improved efficacy and capacity in the use of data by all staff to drive outcomes.

### IT Modernization

During both the Reflect and Re-Imagine phases of the Strategic Reset Plan process, participants expressed concerns about either the lack of sufficient technology or the lack of effective use of existing technology. Transformation to a district and schools prepared and ready for 21<sup>st</sup> Century teaching, learning, and working means that the district must modernize by making smart and forward-thinking investments in information and educational technologies.

As a critical supporting program to the district’s Mission Priorities, the IT Transformation team is collaborating extensively with the MP teams to ensure that their work is not only supported but is literally transforming how that work is done. At the same time, strategies and projects within this Transformation Driver are designed to build that 21<sup>st</sup> Century foundation upon which *all* the district’s programs will be developed and sustained.

### Executive Summary Conclusion

Details associated with all the Strategic Reset Plan components described above, including supporting strategies and projects, are contained in the following main body of the document.

# Strategic Reset Plan

## Introduction

Over the past several years significant changes and events, from internal senior leadership to a global pandemic, have necessitated changes in the ways in which the Peoria Unified School District Governing Board and Administration establish strategic vision, direction, and plans. In the five academic years from July of 2016 through School Year 2020-2021 the district experienced four changes in Superintendent. Even more profoundly, the COVID-19 pandemic has disrupted the health and learning of millions of PreK-12 students throughout the nation.

In February of 2018 the Peoria Unified Governing Board directed the newly appointed Interim Superintendent to begin development of a new Strategic Plan and process to provide clear strategic direction and to institutionalize strategic planning within the district. As an important first step in development, the Board and district leaders established four Strategic Perspectives:

- Student Success
- Safety and Well-Being
- Steward of Resources
- Community Connection



The Strategic Perspectives form the collective lens through which the community evaluates the district and its schools' performance and, as such, form the foundation for our strategic planning. The intent of the Strategic Perspectives is also embedded in the district's Mission, Vision, and Values Statement, as documented in Governing Board Policy A.

Finally, the principles that follow from the Strategic Perspectives are at the core of the work the district has done to develop its strategic planning program, including this 2022-2024 Strategic Reset Plan.

The COVID-19 pandemic caused sudden, dramatic, and lasting change in PK-12 education throughout the nation. In Peoria Unified, students and staff left for Spring Break in March 2020 fully in-person. One week later, schools were back in session but in a 100% virtual instructional mode, and nearly the entire workforce commenced working from home. Over 18,000 laptops – representing nearly 90% of the district's laptop inventory at the time – and over 1,000 Internet hotspots were issued to students and families who needed them, all within three days.

While many of Peoria's teachers, administrators and other staff were familiar with the district's video collaboration platform (Microsoft Teams), staff and students had to learn essentially overnight how to depend on that technology as a lifeline for learning and working every single day. As most schools learned nationwide, we also quickly discovered that curriculum designed for the physical classroom did not translate very effectively to this new virtual mode, requiring licensing of online curriculum and resources suitable for virtual teaching and learning.

And, while most of the Peoria staff worked from home, many of our employees' jobs still had to be done on district premises, requiring that we immediately provide sufficient Personal Protective Equipment (PPE) to keep them safe and special cleaning and sanitization equipment to keep those premises viable.

With the strong support of the Governing Board and under the leadership of its new Superintendent, Dr. Jason Reynolds, Peoria Unified was able to safely open all district schools for in-person instruction in September of 2020, just a few weeks after opening the 2020-2021 school year virtually. After March of 2020 and into this new school year, the pandemic resulted in an all-hands-on-deck approach to continuation of teaching and learning and to simply keep the district and its schools operating. With the team's diligence, Peoria Unified was able to keep schools open for in-person learning during the entire school year.

As the first semester of School Year 2020-2021 drew to a close, the Superintendent and district leadership began considering what post-pandemic PK-12 education would look like, both nationally and within Peoria Unified School District. It became abundantly clear that a major reset in our strategic direction and planning was necessary.

## Reset, Recovery, and a New Trajectory

The national consensus among educators and the communities they serve is that many changes brought about by the pandemic are permanent. Examples include some levels of virtual learning, as well as dramatic increases in the use of technology to empower teaching and learning. The Peoria Unified experience resulted in the same conclusions. Unfortunately, the pandemic also resulted in substantial disruption in learning for many, even most, students. Recovering from those disruptions is vital in restoring students' growth toward proficiency. Moreover, the sense of personal loss and in some cases mental/emotional trauma resulting from COVID-related restrictions (e.g., masks, social distancing, quarantining, inability to gather with their friends and family, etc.) is something that must be recognized and addressed.

At the same time, we recognized that while recovery – in all its forms and functions – is essential, recovery cannot simply mean returning to where we were as a district prior to the pandemic's onset. Rather, we recognized that the nation, our local community, and indeed the challenges facing PK-12 education have permanently changed, requiring us to re-imagine the district as an institution fully prepared to meet the 21<sup>st</sup> Century challenges of this post-pandemic world. Indeed, reflecting on the past several years, including recent pre-pandemic years, our conclusion is that the district's performance, while positive, has been relatively flat. Peoria Unified students' year-on-year growth has been average compared to the overall state. When combined with COVID-related learning disruption, the inescapable conclusion is that substantial change is required to put Peoria Unified and our students on a new trajectory of excellence!

Accordingly, on February 26, 2021, Dr. Reynolds issued the following charge to all district administrators:

*"It's time to reclaim our seat at the head of the table of national leadership in PK-12 education!"*

The Superintendent and his leaders subsequently began a process in March of 2021 to develop a new Strategic Reset Plan that addresses the needs both to recover and to execute a major reset of the district's vision and direction. The Superintendent's vision for getting on that new trajectory and ultimately achieving our goal of national PK-12 leadership comprises the following six components:

- We will make student-centered, data-driven, and shared decisions.
- We will be a highly effective professional learning community.
- We will ensure that every student and employee is known, valued, cared for, and challenged.
- We will be a highly trained and modern workforce.
- We will communicate effectively.
- We will be recognized as a community, state, and national leader in PK-12 education through greatly increasing levels of student achievement.

The six items are not listed in a particular order, except to say that the first five all build to the last, most important vision component, which underscores the Superintendent's clear focus on student achievement.

## Goals, Process, and Timeline

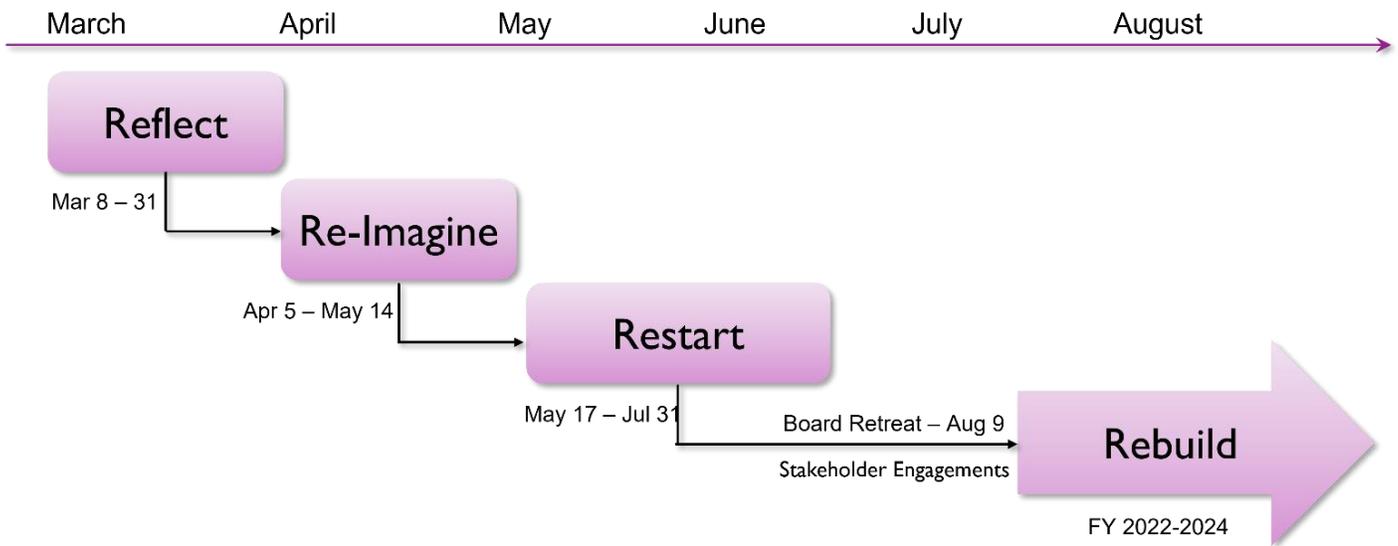
Peoria Unified’s Strategic Reset Plan has two high-level goals:

1. Develop and obtain approval for a three-year plan that will achieve the following:
  - a. Recover from COVID-19 academic and operational disruptions.
  - b. Transform Peoria Unified to a new, re-imagined state that will meet the post-pandemic needs of our 21<sup>st</sup> Century students and community.
2. Develop and implement ongoing processes for:
  - c. Progress monitoring and oversight to ensure successful execution of the plan.
  - d. Annual updates and appropriate adjustments to the plan.

To accomplish these goals, we developed a four-phase process:

- **Reflect:** Discuss and determine what has transpired during the pandemic and prior years, what we have learned about our strengths and weaknesses, what the new year and beyond will bring, and how we should approach planning for that future.
- **Re-Imagine:** Envision and design a new Peoria Unified that is recovered and transformed into an institution able to meet the post-COVID demands of the 21<sup>st</sup> Century.
- **Restart:** Develop a three-year plan for implementing the strategies and initiatives designed to create our re-imagined future. Develop an annual plan revision process that is integrated with our existing Budget Development and New School Year processes.
- **Rebuild:** Successfully execute those strategies/initiatives and annually review and revise the plan as part of the annual new year planning cycle.

The following graphic illustrates the timeline for the four phases of the plan:



Peoria Unified Four-Phase Strategic Reset Timeline

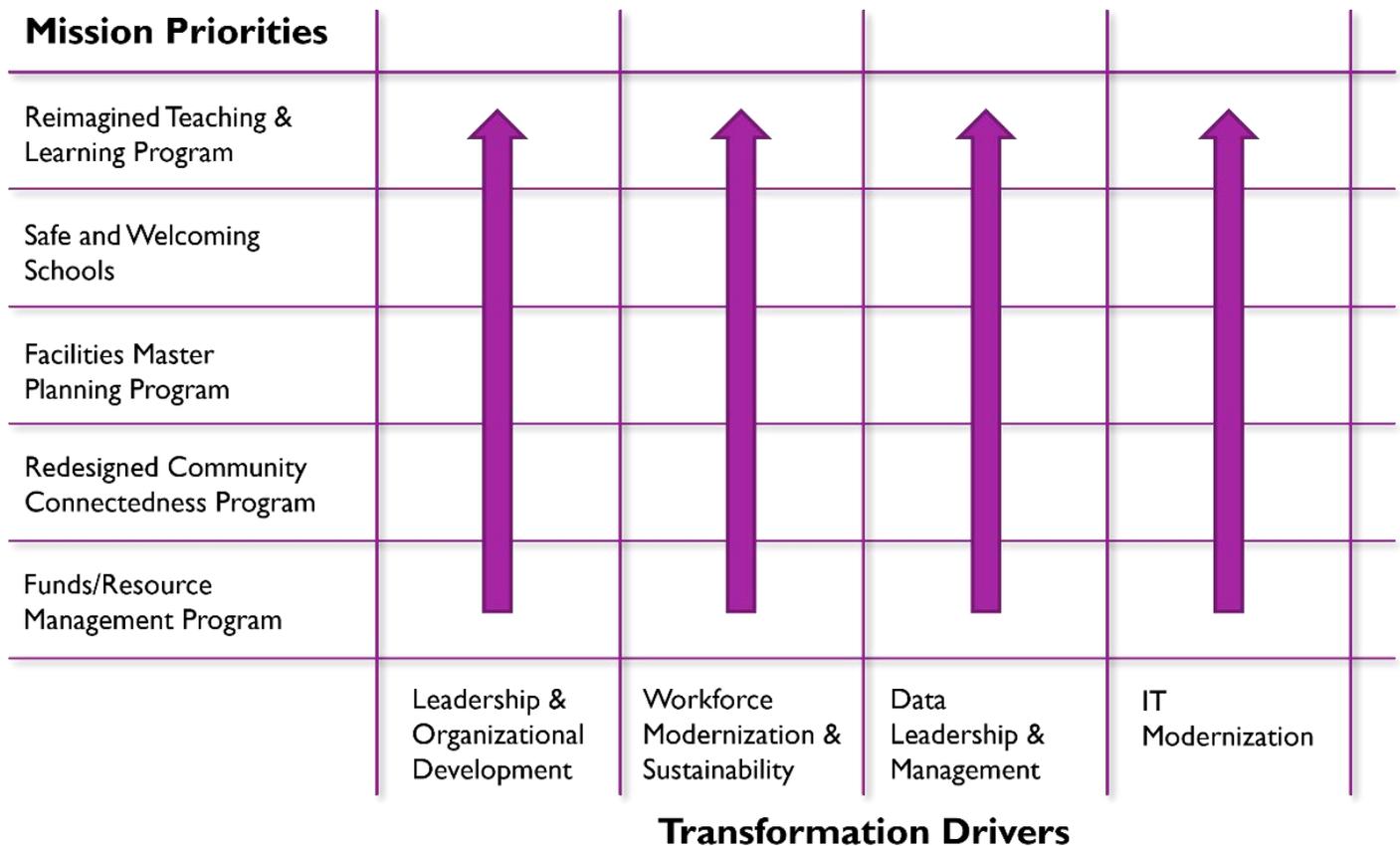
## Strategic Reset Framework

As stated previously, the purpose of the Re-Imagine Phase was to “envision and design a new Peoria Unified that is recovered and transformed into an institution able to meet the post-COVID demands of the 21<sup>st</sup> Century.” The primary outcome of that phase was the Strategic Reset Framework, which in essence is an integrated set of program components, each containing strategies whose purposes and projects collectively work to meet the Strategic Reset Plan goals.

As shown in the Strategic Reset Framework graphic below, the framework’s components are arranged in two “perpendicular” groups, illustrated as the rows and columns of the framework:

- **Mission Priorities (MP):** Each MP describes a program that is a vital part of the Peoria Unified mission. Collectively, the MPs and the strategies and projects they contain represent and address the highest priority mission programs within the Strategic Reset Plan.
- **Transformation Drivers (TD):** Each TD refers to a district program or function that provides capabilities and capacity in support *all* the Mission Priorities. Further, and equally importantly, each TD contains strategies and supporting projects that are designed to *transform* the ways in which we work to accomplish each Mission Priority.

## Strategic Reset Framework



Each Mission Priority and Transformation Driver specifies one or more strategies with supporting implementation projects.

## Stakeholder Engagements

Stakeholder engagement and community input are important aspects of the shared decision-making model that the Peoria Unified School District employs. In that regard, the district has held, and continues to hold, several activities and events to solicit information from all major internal and external stakeholder groups on the district's strategic plan.

Feedback gathered has been and will continue to be considered for incorporation into this plan and its annual revisions. Additionally, as the district continues further implementing the district's strategic plan, additional stakeholder engagement events will occur. A brief timeline of stakeholder engagement events completed and planned is outlined below:

- ✓ Plan Development – Over 50 administrators, teachers, and classified staff
- ✓ Peoria Education Foundation – June
- ✓ Parent Focus Group – June
- ✓ All Administrators – Plan Update and Feedback – July
- ✓ Community Questionnaire – August
- ✓ Standing Groups – August:
  - ✓ Superintendent Student Advisory Council – August
  - ✓ Superintendent Stakeholder Advisory Council – August
  - ✓ Peoria Unified Faith Council – August
- ✓ Parent Engagement Forums – September
- ✓ Feedback from Site Councils – September and October

The Peoria Unified School District thanks all stakeholders who took part in providing feedback and ultimately assisting the district in the development of this plan.

## Plan Components – Mission Priorities

### Re-Imagined Teaching and Learning Program

#### Background

The primary driver of all that Peoria Unified School District does is student achievement and learning. The coronavirus pandemic provided unique challenges to the standard pre-pandemic educational model under which school districts operated prior to school closures in March of 2020. With the changes in how education was delivered and other impacts of the pandemic, school districts across the nation saw that their students experienced learning disruption.

Returning to Peoria’s previous model of education would be insufficient to address the disruption in learning experienced by students. Instead, transformative innovation is needed to accelerate learning and allow students to address the impact of disrupted instructional time.

Transforming Peoria Unified into a re-imagined district that is prepared to meet the post-COVID challenges of the 21<sup>st</sup> Century includes attention to common expectations, professional development for teachers in the use of technological skills and district resources, mutual accountability for professional learning communities, interventions, and extensions to address learning loss and student growth, and use of data to determine small groups for instruction.

Using data to determine next steps in teaching and learning is critical to ensure all students get the assistance they need. For this reason, data must be used to progress monitor student success and address learning disruption or gaps in learning.

To address these needs, we will:

- Develop and offer choice for in-person and virtual schools that ensure student growth and achievement and provide professional development for strategies, tools, and models.
- Fully implement professional learning communities, focusing on effective use of student data to make decisions about interventions, learning disruption, and extensions.
- Target identified schools and student groups for school improvement initiatives that make a difference and demonstrate growth in student learning within identified student sub-groups.
- Assess programming needs K-5; 6-8; and 9-12 to ensure our comprehensive programming by grade level bands includes rigorous and modernized courses and appropriate curricular resources.

To accomplish these objectives, the district has identified the following strategies.

#### Strategy 1 | Re-imagine teaching and learning by establishing expectations and implementing best practices for blended in-person and virtual learning, K-12.

As Peoria Unified implements best practices for in-person and virtual learning, the district will provide a comprehensive professional development plan and a data-driven progress monitoring approach at the site and district level.

Additionally, the district will fully implement professional learning communities and plans to address significant gaps in student learning.

We are dedicated to investigating and implementing research-based best practices during this transformation of the district’s teaching and learning approach to ensure that teaching and learning processes will support effective blended and virtual learning. These best practices will include:

- *Standards-based instruction*, which directly aligns instructional units, lesson plans, resources, etc. with the Academic Standards, as defined by the Arizona Department of Education (ADE).
- *District-adopted materials and assessments*. Use of these resources ensures that standards and consistency are maintained throughout the district and that administrators can fully and effectively support teachers in their use.

- *Short-term formative assessments.* These standards-aligned assessments are relatively brief and able to be given frequently as embedded parts of instructional units (e.g., “quizzes”). They are formative in that they provide quick-response data to inform teachers regarding individual students’ comprehension and mastery of the materials. This directly supports small group instruction and adapting of instructional methods to meet the needs of individual students.
- *Use of student data* to inform teachers regarding the need for interventions and extensions for small groups and specific students.
- *Small group instruction* focused on specific learning needs of students.
- *Planned, rigorous, learning activities* promoting teamwork, critical thinking, and problem solving.

*Goal:*

The teaching and learning process will support effective blended and virtual learning and explore models of instructional delivery.

*Supporting Projects:*

1. *Virtual school for school choice for students in grades K-12.*: Beginning School Year 2021-2022, this project will expand the district’s existing eCampus virtual school from a high school program to a K-12 virtual school choice. **COMPLETED 2020** | In the fall of the 2020-21 school year, Peoria Unified launched eCampus Virtual School to serve students K-12. As of the 2022-23 school year, eCampus serves 177 students.
2. *Classroom expectations and responsibilities for grade level bands and professional development in the integration of district-adopted resources including technological tools and strategies.* This project’s objective is to re-establish classroom expectations using time, small group instruction, digital tools and strategies, and use of student data for grouping. **IN PROGRESS** | The Academic Services team held Professional Development sessions in the fall of 2022 with collective decision making between Academic Services and Student Support Services. Additional work remains around monitoring accountability and finite expectations.
3. *Site Support Task Force Implementation.* The objective of this project is to create a small task force of certified staff whose purpose is to provide teachers with training, resources and consultations focused on implementing research based best practices in the classroom.
4. *Robust summer programming to address specific learning disruption.* The objective of this program is to offer specialized programming to support students who are unable to recover sufficiently from their own learning disruption during the regular school year. **IN PROGRESS** | Beginning in the Summer of 2021, Peoria Unified reimagined the structure for summer school to meet the academic needs of all students. This work will continue throughout the lifecycle of the Strategic Plan.
5. *Establishment of mutual accountability for effective implementation of Professional Learning Communities (PLCs) and a Multi-Tiered System of Supports (MTSS) to increase student achievement.* This project’s objective is to ensure implementation of the Professional Learning Communities and Multi-Tiered Systems of Supports processes at the school level. These processes must be implemented with fidelity to ensure all schools have best practices in place to assess student learning of state standards, identify gaps in skills in support of tiered interventions, and to effectively monitor student progress. Learning gaps will be identified and remediated through the use of student data. The district’s assessment plan will establish baseline student data and intermittent diagnostics, K-9. The district will also utilize ACT practice tests at the high school level. **IN PROGRESS** | Academic Services and Student Services departments have already started professional development regarding the MTSS and are working collectively to develop the commitments further.

Strategy 2 | Research, design, and implement curriculum, academic programs, and district facilities to increase student engagement and rigor and modernize the student experience.

Peoria Unified School District has an outstanding reputation as a quality school district and community. Traditionally, the district has celebrated many programs and opportunities for students. We intend to continue to research and stay abreast of best practices for curriculum and academic programming for the 21<sup>st</sup> century. We also want our students to be able to compete nationally and internationally. This strategy will focus on areas for improvement in the K-12 curriculum and academic programming to update and enhance the student experience.

*Goal:*

Implement research-based best practices for curriculum and academic programming in the grade level bands of PK-5, 6-8, and 9-12 in core and electives opportunities for students.

*Supporting Projects:*

1. *Increased rigor at the high school Levels through increasing participation in Advanced Placement (AP) courses and AP test proficiency.* The objective of this project is to ensure junior and senior students have access and enroll in AP courses and encourage the AP exams to test proficiency.

**IN PROGRESS** | The district is working in conjunction with ADE's improvement process. We have already seen an increase in students taking the AP exams this year, and that data is shared with the high school principals.

2. *Best-practice research and programming for core and elective programming for grades 6-8 to modernize student experiences, expand choices, and consider middle school models, (K-5 and Pre-K) and for the future.* The objective of this project is to explore middle school programming and review facility needs to determine capability to offer a middle school experience for students 6-8, an elementary experience K-5, and a PreK model.

3. *Acquisition of research-based, curricular resources.* The objective of this project is to replace aging resources in core areas with current, modern resources.

**IN PROGRESS** | The Curriculum and Instruction Department in partnership with Business Services has begun the RFP process for Math and Science resources.

4. *Use of national standards (Cognia™) to assess needs and identify areas for growth as a school system by participating in the district accreditation process.* The objective of this project is to successfully prepare for the virtual district-wide accreditation review scheduled for February 1- 4, 2022.

**COMPLETED 2022** | In the spring of 2022, Peoria Unified renewed its accreditation through Cognia.

The district believes that the activities under the Re-Imagined Teaching and Learning Program Mission Priority are evidence-based interventions to address district-wide learning disruption, social-emotional needs of all students, and the needs of vulnerable student populations, including those students who are disproportionately affected by the pandemic, on our campuses.

## Safe and Welcoming Schools

### Background

One of the four Strategic Perspectives, which are described above as the foundation for the district's Strategic Plan, is Safety and Well-Being. Since 2018 the district has implemented several site safety and emergency response programs to improve overall safety for student, staff, and visitors. While our schools and administrative centers are much safer as a result, much work remains to incorporate those activities into a formal program with defined expectations and metrics. This will go much further in achieving the highest levels of safety and emergency preparedness expected by the district and our community.

In addition to safety, it is essential to provide environmentally healthy and effective learning and working environments for students and staff. As part of our COVID-19 mitigation work and using primarily ESSER I funding, the district acquired and deployed advanced air purification systems and facility disinfecting equipment to greatly improve the health environment at all schools and administrative centers. Ongoing work is required to ensure that our facilities remain environmentally safe and healthy.

Finally, a major component of health and well-being is the extent to which our schools are welcoming to our students and their families, as well as to district staff. District leadership is committed to the beliefs that welcoming schools:

- Enhance our students' readiness and ability to learn.
- Instill confidence in our parents and community at large.
- Enhance the image of the schools and district as valued partners with our community.
- Incentivize students and parents to want to experience our school facilities and interact with staff.

Annual community surveys affirm these beliefs. Also, feedback received in a recent Strategic Reset Plan Parent Focus Group event and the two Parent Engagement Forums held in September not only affirms these beliefs but also raises our awareness of the need to improve the quality of customer service offered to students and parents as a vital part of developing welcoming schools.

To address these and other related needs, the purposes of this Mission Priority and plan component are as follows:

1. Each school provides a learning and working environment in which the physical and electronic/digital safety and privacy of each student and staff member is ensured.
2. Staff and students at each school are fully prepared to respond appropriately to any form of emergency.
3. District schools and administrative facilities are environmentally healthy.
4. Each school presents a positive, welcoming atmosphere, both physically and in the demeanor of the staff and student body.

### Strategy 1 | Develop and implement a formal Safety and Emergency Management program.

As indicated above, Peoria Unified launched activities in 2018 to improve the physical safety posture of the district's schools and other facilities. While these activities were primarily responses to the alarming increase in school shootings nationally, school safety is a much broader focus area with ongoing programmatic needs.

Emergency preparedness and response is another vital aspect of school safety that must be refined and improved continually. In 2018 a team from the district received school-specific emergency planning and response training through the Federal Emergency Management Agency (FEMA). Following that training, each school and administrative/support center in the district developed an Emergency Operations Plan (EOP) that is updated periodically. Drills are also conducted periodically throughout each school year to ensure that staff and students remain prepared to respond.

A digital system for emergency notifications for schools and our community is essential. The district's current system has served our needs but is out of date and in need of replacement. There is a project described within the Redesigned Community Connectedness Mission Priority (Strategy 1) that will fulfil this need.

Several other new initiatives and program development work, as described below, will be launched to make the Peoria Unified Safety and Emergency Management Program more comprehensive and able to meet the expectations of district leadership and our community.

*Goals:*

1. Annual EOP updates and required emergency drills are completed as planned by at least 95% of schools and other district facilities.
2. The Integrated Safety, Security, and Energy Management System is fully implemented by end of SY 2022-2023.
3. The every-four-year CPTED Assessment cycle is implemented for all schools, with each school completing its initial assessment by end of SY 2022-2023.

*Supporting Projects:*

1. *Formal Safety and Emergency Response Program.* There are myriad definitional and administrative details to be done by staff to complete this work, including program documentation, Board policy and staff regulation review and development, procedural guides, etc. One specific outcome of this project is establishment of a Program Coordinator position and subsequent recruitment and hire. This individual will provide leadership and facilitation of school and district staff and administration who have specific safety and emergency management roles. Establishment of the program and coordinator position will be completed for the 2022-2023 school year. The specific outcome of this project is development and implementation of the district Safety and Emergency Management Program.

**COMPLETED 2022** | The Safety Coordinator position was created, filled and training was given. They have already taken leadership of the task at hand.

2. *Surveillance Cameras at Elementary Schools.* The district has already initiated purchase and rollout of replacement cameras for all high schools. This project will address the surveillance needs of our 33 elementary school locations. The objective is for all elementary schools to be equipped with adequate video surveillance systems that are fully integrated into the Safety, Security, and Energy Management System by end of SY 2023-2024.

**ON HOLD** | Budgetary constraints prevented us from starting the project and it has been placed on hold.

3. *CPTED Assessments and Mitigation Projects.* CPTED – Crime Prevention Through Environmental Design – for Schools is a school-focused application of CPTED, which is a program developed and sustained by the National Institute of Crime Prevention (NICP). During SY 2018-2019 a small number of district staff were trained to perform CPTED Assessments for district schools. The assessments were initiated and some mitigation repairs and modifications to facilities were completed, but sufficient funds to complete even one full round of assessments – let alone implementing the required repairs and modifications identified – were not available at the time. The assessments need to be made recurring throughout the district, and funds need to be allocated for making the repairs and modifications identified through those assessments.

The objectives of this project are:

- a. Train a sufficient number of staff to enable completion and on-going continuation of the CPTED Assessment cycle.
- b. Implement annual CPTED Assessments on a four-year cycle, incorporating the schools that have already received an assessment into the schedule appropriately.
- c. Use available funds to address the high priority needs identified through the assessments to support a safe and effective learning environment.

**IN PROGRESS** | The CPTED team was re-established and trained. Initial assessments of the schools will be completed by June 2023.

4. *Integrated Safety, Security, and Energy Management.* The district currently maintains independent systems that provide monitoring/surveillance, sensors, and alert notifications covering fire, facilities door locks, video surveillance, and energy management. Some of these systems are relatively new, while others are aging and should be replaced soon. This project is designed to upgrade (as necessary) and integrate these systems, resulting in unified controls, monitoring, notification, and threat analysis. This project is described in more detail until the “IT Modernization” Transformation Driver.

**IN PROGRESS** | The review of the systems has already started, which include but are not limited to: upgrading cameras/system in the high schools and other district buildings; adding quality air sensors in bathrooms for earlier vape detection.

**Strategy 2 | Develop and implement a “Quality Customer Service” program by which school administrators and staff develop skills that make our families and other school visitors feel welcome and that their needs are addressed.**

The perception of any school is in large part determined by the impression visitors to the school get when they enter, both the grounds and, importantly, the level of service they receive from school staff. In both the recent Parent Focus Group and the two Parent Engagement Forums held by staff to obtain input and feedback on the Strategic Reset Plan, many parents related that our schools do not consistently offer the level of customer service they believe to be appropriate. Some of those indicators include willing eye contact, level of friendliness, attitude, and of course, the extent to which the purpose of the visit is fulfilled. It is vital to the development and strengthening of relationships between the district and our community that we address this issue.

As a vital part of strengthening the connections between our schools and the community, we have designed this strategy to specifically address the quality of the reception and interaction visitors to schools and departments experience, as well as the extent to which needs are met.

*Goal:*

Parents and other visitors to Peoria Unified schools and other facilities rate the quality of their experience and the levels to which their needs are met (i.e., whether the purposes of their visits are satisfied) as good or excellent, as determined via surveys, by at least 90% of the survey respondents.

*Supporting Projects:*

1. *Customer Service Standards Definition and Training.* This project has the following three objectives:
  - a. Convene an action team drawn from school and department staff and parents to define and document, in a handbook or other suitable form, the standards of customer service required for all Peoria Unified schools and departments.
  - b. Based on the standards defined above, execute a baseline survey to determine our current level of customer service satisfaction. The survey should also include opportunities for respondents to provide open-ended feedback.
  - c. Based on the survey results, make any appropriate adjustments to the documented customer service standards, and conduct training throughout the school district.

**IN PROGRESS** | The team has outlined the Standards of Excellence to include the 5 R's: Ready, Responsive, Respectful, Reliable and Reflective and trainings began in the fall of 2022.

2. *Annual Customer Service Evaluation and Response.* This project is intended to implement an annual process in which internal and external stakeholders are surveyed using an instrument that starts with the baseline survey and is revised annually as appropriate. The results are used to make necessary changes to the customer service standards and to update and plan annual customer service training for staff. Each year's objective is to continuously improve the overall satisfaction rating until the level reaches and/or surpasses 90%.

Strategy 3 | Devise and implement a “Campus Appeal” program that defines standards for school appearance and makes appropriate improvements to create and sustain a physical sense of welcome at each school.

The overall intent of the Safe and Welcoming Schools Mission Priority requires an important balance between the twin “Safe” and “Welcoming” goals. While keeping our schools safe for students, staff, and visitors is critical, we cannot lock those facilities down to the extent that they become unwelcoming places. Security features can often feel “cold” or even frightening, especially to young children.

The intent of this strategy is to ensure that each of our campuses both appears and in fact is welcoming to our students, staff, and visitors. Further, the community at large should view each of our schools as a valuable and appealing component of the community. Part of being welcoming is certainly found in the attitudes and demeanor of staff on each site. That aspect is part of the “Quality Customer Service” strategy described earlier. This “Campus Appeal” strategy is primarily focused on the physical aspects of each site.

Campus Appeal standards are essential to the success of this strategy, along with staff training and measurement of results.

*Goal:*

The physical appearance of each Peoria Unified school, including the facility itself and the associated grounds, will present an appealing and welcoming image to all students, staff, visitors, and the community in general. This desired image will be consistently defined across the district, keeping in mind the individual characteristics of each location and facility. Specific metrics for determining success of this goal will be part of the standards development; the overall goal is 90% satisfaction.

*Supporting Projects:*

1. *Campus Appeal Standards and Measures Definition.* This project’s objective is to define and document minimum standards for appearance of grounds and school facilities. Along with standards, this project will also result in development of specific methods for measuring both the actual degree to which standards are met and the perception of Campus Appeal on the part of students, staff, and the community.

**IN PROGRESS |** We have started to collect and set the base standards for the appearance of our grounds and school facilities.

2. *Campus Appeal Implementation.* This project has two major components and objectives:
  - a. Develop a Campus Appeal Assessment protocol and conduct a baseline assessment for each site. The objective is to determine the extent to which each site meets the standards defined in Project #1.
  - b. Develop and execute a plan for remediating all Campus Appeal deficiencies.
3. *Annual Campus Appeal Assessment.* Building on the Campus Appeal Assessment protocol, the objective of this project is to annually assess the extent to which Peoria Unified campuses are meeting the Campus Appeal standards, and to assess student, staff, and community perceptions of Campus Appeal. The results from both assessments will be used to continuously improve each campus, with an overall goal of attaining at least a 90% success rate.

## Facilities Master Planning Program

### Background

The Peoria Unified School District operates 42 school facilities and three support facilities, all in direct or indirect support of student learning and achievement. As the district works to re-imagine the most effective operations of the school district as whole, this necessitates considering how the district can make the best use of district facilities to support safe and effective learning environments.

In keeping with the focus of the entire plan – transforming Peoria Unified into a re-imagined district that is prepared to meet the post-COVID challenges of the 21<sup>st</sup> Century – it is critical that the new Facilities Master Planning Program be integrated and aligned with the Re-Imagined Teaching and Learning Program.

Also, it is necessary that this program begin by continuing the work done by the Facilities Master Planning Committee (FMPC) during the winter and spring of the 2020-2021 school year. The FMPC was a Superintendent’s committee formed to develop candidates for repurposing of school facilities. The first strategy in this program addresses the needs for next steps regarding repurposing of school facilities.

However, it is important to understand that the district’s focus for facilities is larger in scope than simply managing the district’s physical property. As the district considers near and long-term needs for schools, there will be needs to consider Transportation, Food Services, and other support departments so that those important services can continue to be effectively and efficiently provided to students throughout the district’s very large geographic area. For that reason, the district will work to take a comprehensive view of facilities planning.

To address these needs the district plans to

- Develop and maintain a long-range Facilities Master Plan that ensures that all students, staff, and visitors are accommodated in facilities that are safe, appropriate, and conducive to successful teaching, learning, and work.
- Ensure that the district’s facilities:
  - Are planned, built, and maintained in the most cost-effective and environmentally responsible manner possible.
  - Present a positive, professional, and welcoming image for the Peoria Unified community.
- Ensure that Transportation, Food Services, and other programs that provide vital services to students are incorporated into the Master Plan development process.

To accomplish these objectives, the district has identified the following strategies:

### Strategy 1 | Develop a long-term Teaching and Learning Facilities Master Plan in alignment with Re-Imagined Teaching and Learning.

As Peoria Unified transforms teaching and learning within the district to meet the needs of the 21<sup>st</sup> Century, post-coronavirus environment, we must develop a long-term teaching and learning facilities master plan that is in alignment and directly supports the transformation.

As we explore and expand a model that offers blended and virtual learning environments and explores designs and implements academic programs for the future, we need to ensure that the district’s facilities support this mission and provide an engaging academic and physical environment for students and staff.

To address these needs the district’s long-term teaching and learning facility master plan will:

- Include innovative designs for new schools with re-imagined flexible learning spaces, furnishings, and equipment.
- Include planning for modernizing and re-equipping existing schools to meet the needs of the Re-Imagined Teaching and Learning Program.
- Incorporate all available data regarding community growth and demographic changes.
- Consider research and current best practices around planned school size and enrollments.

- Continue and complete the consideration of schools for repurposing begun by the Superintendent’s Facilities Master Planning Committee (FMPC).
- Consider accommodations for the potential implementation of specific programming for K-5 and 6-8 grade bands.
- Incorporate specific accommodations for the expansion of the eCampus/Choice Program.

*Goal:*

The district has a documented 5-10-year Facility Master Plan that is fully aligned with district teaching and learning (T&L) programs and is designed to facilitate achievement of all T&L program goals.

*Supporting Projects:*

1. *School Facilities Repurposing Plan.* This project’s objective is to continue from the recommendations of the FMPC and to work with the Governing Board to determine which – if any – of the school facilities recommended for repurposing should in fact be repurposed and adjusting school boundaries if repurposing decisions dictate the need to do so.  
**SUSPENDED 2022** | In Aug. 2022, the Governing Board and District Administration suspended the school repurposing process. This decision came after months of work from the Facilities Master-Planning Committee and their review of data specific to each campus.
2. *K-5, 6-8 Schools Consideration.* This project is a collaboration with the Re-Imagined Teaching and Learning Program, Strategy 2, Project #2.
3. *School Facilities Repurposing Implementation.* This project’s objective is to implement the decisions of the Governing Board regarding repurposing of existing school facilities. It is the execution phase of the *School Facilities Repurposing Plan* project described above.

**Strategy 2 | Design and implement an ongoing Facilities Master Planning Program.**

The district currently does not have a comprehensive and ongoing Facilities Master Planning Program. Instead, the district relies on ad hoc committees and other mechanisms to address specific needs, such as Bond development (including Citizens Advisory Committees), repurposing opportunities, and capital decision-making, among other processes and procedures. This strategy recognizes that Facilities Master Planning is fundamentally an organization-wide need, rather than a program with a single department or funding source focus.

This strategy, specifically in the context of the district’s Strategic Reset Plan, is a part of a more comprehensive *student accommodation planning* process that includes transportation, food services, and other service-oriented programs that directly and indirectly support student learning, achievement, and growth. Finally, the need includes an ongoing oversight role in which analysis, research, and decision-making take place.

The components of this strategy have an objective focus on:

- A strong level of collaboration between this program, Academic Services, and Student Services (school supervision and related services).
- Strong partnership with the Chief Financial Officer and Business Services Department.
- Data collection and analytics support.
- Establishment of an annual budget to support planning, external research, and administration.
- A goal to ensure Facility Master Planning is grounded in a mindset of accommodating all student support needs.

*Goal:*

The Facility Master Planning Program has the capability and capacity to develop and sustain an ongoing long-range Facility Master Plan, along with the leadership presence within the district’s organization to effectively facilitate the work and stakeholder involvement required to successfully develop and sustain the plan.

### Supporting Projects:

1. *Facilities Master Planning Program Design and Implementation.* This is the foundational project within this strategy. Its objective is to formally establish and implement an effective and ongoing program. The design and creation of the program shall follow the emerging “Program Definition” concept being developed as part of the Comprehensive Funds/Resource Management Program Mission Priority.
2. *Facility Condition and Operation index Design and Implementation.* This is a very focused project whose purpose is to create a “rating index” by which the condition and operating costs of all district facilities will be combined in an index for evaluation and comparative purposes. The index shall be a composite score that includes, at a minimum, the following:
  - a. Suitability and feasibility for offering required district academic and extracurricular programming.
  - b. Maintenance cost
  - c. Security and safety condition
  - d. Technology infrastructure cost and condition
  - e. Energy and other utility costs.
3. *Student Accommodation Planning.* As indicated above, effective and comprehensive master planning for schools must include planning for the student-related services that are provided at schools and service facilities. Two significant services in this context are transportation and food services, but other student services, such as student health and well-being, and Special Education services, among others, must be considered as well. There are many considerations, but as the district grows, we must plan for locating those service facilities throughout the district’s geographic area such that the services may be provided in the most cost-effective manner.

### Strategy 3 | Explore partnerships with external entities for the purpose of considering adaptation and/or development of shared facilities.

As the district grows, expands the number of schools, and considers repurposing existing facilities it is incumbent upon leadership to establish close working relationships with various external entities for the purpose of potentially sharing facilities. External entities may include county and city jurisdictions, community colleges, WestMec, other districts, not-for-profit organizations, etc. One simple example might be creation of a shared transportation facility in the north part of the district’s boundaries to greatly shorten distances travelled by our buses. Following are some specific components of this strategy:

- Opportunities for future construction of shared support and/or public services facilities, such as transportation, logistics, community services, IT/Data Centers, etc. are fully explored and, if appropriate, included district Bond initiatives.
- Opportunities for repurposing of existing facilities, either externally or district owned, are considered for use as shared facilities as well.
- Teams from external entities and Peoria Unified consider potential agreements for joint operation of shared facilities.

### Goal:

The development or modification and use of shared facilities with appropriate external entities is thoroughly examined and, if such sharing is determined to be feasible, agreements are developed and approved, and plans are developed for necessary development and/or modification of those facilities.

### Supporting Project:

1. *Potential Shared Facilities Partnership Development.* The objective of this project is to reach out and establish and/or strengthen relationships with external organizations that build and maintain facilities and who may be interested in sharing either their facilities or the district’s. Where there is potential for sharing, the follow-on objective is to develop the contractual agreements, MOU’s, IGA’s, etc. that would precisely describe each relationship and the mechanisms for any future sharing.

**ON HOLD** | In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.

## Strategy 4 | Design and implement a Data Analytics system to fully support the Facilities Master Planning Program.

Having safe, environmentally healthy, welcoming, engaging, and effective facilities directly supports student engagement and learning and is a direct measure of student opportunities to learn. To that end, data analytics around district facilities' status is part of a larger context to maximize student learning and achievement through effective use of data and analysis.

Enormous amounts of data are needed to effectively manage the district's facilities and to maximize student opportunities to learn using metrics and key performance indicators. Specifically, Facility Master Planning requires a significant amount of transactional data that must be integrated from multiple sources and organized into data models that support complex analyses and what-if scenario planning. Also, ongoing maintenance of Key Performance Indicator data is critical to ensuring high quality of the planning process and outcomes.

This project will be coordinated with similar projects supported by the Data Leadership and Management area of the Strategic Reset Plan. See the Data Leadership and Management Transformation Driver, Strategy 2. To that end, it is important to consider where it may make sense to develop or acquire analytics products that support multiple areas within the Strategic Reset Plan and district operations as a whole. For this reason, the only specific project described here is about data analytics needs determination.

The purpose of this strategy is to ensure the district's Facility Master Planning Program is fully supported by the data and analytical capabilities needed to allow the district to meet the primary goals of the program.

### *Goal:*

The Data Analytics system is fully implemented and effectively supporting the work of the Facility Master Planning Program, as well as district senior leadership.

### *Supporting Projects:*

1. *Data Analytics Needs Determination.* The objective of this project is, by working with master planning stakeholders and participants in the Master Planning Oversight function, to identify and specify a comprehensive set of data and analytics requirements to support the Facility Master Planning Program. As indicated above, close collaboration with the Data Leadership and Management team is necessary to determine whether these requirements should lead to an analytics capability focused on this program alone or to a broader purpose system supporting multiple analytics areas.
2. *Data Analytics System Acquisition and Implementation.* The objective of this project is to acquire (either commercially or through building internally) and roll out a data analytics system to support this program and related needs.

## Redesigned Community Connectedness Program

### Background

The Peoria Unified School District recognizes the value of fostering a culture of active community engagement and inclusiveness as part of a broader strategy to support student learning.

The district's connection to the community is founded in a strong focus on transparency, integrity, and collaboration in an ongoing effort to build and maintain community trust. As part of this culture of transparency, and with a focus on student growth and learning, the district is working to build upon the current communication channels that connect families to their child's school and classroom. Strong communication between teachers, school leaders, students, and families are required to best support students and drive learning and achievement.

However, community connectedness and its impact on student learning extends beyond direct communication between a student's school and family. There are opportunities to build community partnerships with the local business community and higher education to focus student learning and growth. These partnerships can assist the district in addressing learning disruption and ensuring students are prepared to actively contribute to society, community, and the workforce upon their high school graduation.

As the district redesigns its community connectedness program to help drive student achievement, there will be a strong focus on data to ensure communication in support of all priorities of the district is as effective as possible.

To address these needs the district plans to:

- Improve internal and external communication through modern systems and tools
- Expand connections with key stakeholder groups
- Implement a system to effectively market schools and programs

### Strategy 1 | Improve internal and external communication through modern systems and tools.

The district has recognized a need to improve the systems and tools it uses to access and share information with stakeholders. Specifically, the district has received feedback, including during our recently held Parent Engagement Forums, that many of the tools currently used to communicate with students and parents can be cumbersome to access and use to their fullest potential. To ensure students benefit as much as possible from open lines of communication between the district and their families, the district will be working toward an easy and effective way for parents to receive information and engage at the school and district level using modern systems and tools.

The district believes that its staff members, whether certified, classified or administrative, are its greatest asset. To ensure that district staff have opportunities to engage, access information appropriate to their role in the district and have the tools necessary to adequately do their job, the district will develop an internal communication plan. The plan will determine the effectiveness, scope, tools and frequency of communication across all areas of the district.

The district does not currently have software or a system to support the communications and relationship management of all external district stakeholders. In order to build and develop enhanced community connections it is imperative that a system be in place to maintain the large volume of data associated with community and business stakeholders. Such a database will help principals track connections to support teaching and learning and will help the Communications Team with soliciting stakeholder engagement and feedback and manage district-wide events.

### Goal:

Modern communication systems and tools will support effective, consistent, and focused community connection at the district and site level.

### Supporting Projects:

1. *Parent communications tools evaluation and acquisition.* Evaluate and consider implementation of parent communication tools. Parents and administrators will have an effective, reliable, and customizable mass communication tool to deliver critical information and align with the district's brand.  
**COMPLETED 2022** | The communications team rolled out ParentSquare in the fall of the 2022-23 school year as the district's new mass-communication tool. ParentSquare was selected by a group of parents, administrators, teachers and support staff because of its ability to facilitate two-way communication and reliability.
2. *Digital Customer Relationship Management (CRM) implementation.* The objective is to develop or acquire an automated system and to conduct appropriate training so that skills and capacity will be in place to support

enhanced community partnerships, manage current district relationships with the business community, and foster greater community connection. The two main project components are:

- a. Research a digital customer relationship management system that allows district and school staff to track and manage relationships and communicate with contacts.
- b. Provide training to site administrators on the CRM including strategies for maintaining and fostering increased community connections.

**ON HOLD** | In the fall of 2022, the communications team put this project on hold.

### Strategy 2 | Expand connections with key stakeholder groups.

Research indicates that 70 percent of the district's households do not have school-age children in their homes (*Highground study, 2019*). The district's 140 square miles spans distinctive neighborhoods, each with varying levels of engagement and communication needs. There is a need to define the role of this segment of the community so that voters become more aware of issues facing the school district and have a sense of ownership of Peoria Unified schools. Since alumni also fall into the 70 percent prior to having families of their own, a system is needed to track graduates and connect with them during their post-secondary and career exploration to build relationships and share their success stories.

The district currently has systems in place to connect and gather feedback from parent groups, the faith-based community, student groups and staff. There is a need to develop a better way to connect with the business community and to provide schools with the guidance they need to support partnerships that provide hands-on experiences to students and support district programs. Service on nonprofit and community boards provides valuable professional growth opportunities to district leaders, builds awareness of what other organizations that align with our mission are doing in the community, and provides an additional opportunity for the district to expand its reach into the community.

#### Goal:

Key stakeholders will have a meaningful connection to the district through expanded partnerships and intentional communication processes and programs by July 1, 2024.

#### Supporting Projects:

1. *Annual Communications Plan for the 70% of community without school-age children.* The objectives of this project are the following:
  - a. Develop an internal communications guide to be used by Peoria Unified staff, specific to communicating with external stakeholders. *This tactic was moved to being a supporting project due to the breadth of work involved.*
  - b. Develop an annually updated traditional and digital media strategy.
  - c. Launch a Student Alumni Network to maintain connection with graduates from all schools and foster increased community awareness of the impact our graduates make after they leave us.

**IN PROGRESS** | The communications team is currently in the planning phase and will move to implementation in 2023 utilizing both traditional and digital media strategies.

2. *Development and Launch of the Business Advisory Network.* The purpose of this project is to enhance the district's connection with the local business community.

The objectives are:

- a. Leverage relationships with the chambers of commerce in Glendale and Peoria to foster increased connection with the business community and to develop a network of leaders to meet with the Superintendent and district leadership on a quarterly basis.
- b. Relaunch, in collaboration with the Business Advisory, an event planning process to streamline the semi-annual Field Trip program for the purpose of highlighting our schools to community and business leaders.

**COMPLETED 2022** | In April of 2022, Peoria Unified launched their Business Advisory Network. Each quarter, members meet with our leadership team and discuss the biggest issues facing our school district, work to find solutions and deepen their relationships with the district.

Additionally, on Oct. 25, 2022, Peoria Unified relaunched an event planning process to streamline the semi-annual Field Trip program for the purpose of highlighting our schools to community and business leaders.

3. *Internal Communications Plan development.* This project’s overall objective is to establish expectations for frequency, consistency and focus of internal communication and feedback to support a culture where staff feel empowered to expertly share accurate district information and engage in district initiatives.  
**IN PROGRESS |** The communications team will determine what research is needed and focus on ways to reach those who do not have consistent access to email.
4. *Formal business partnership and advertising program implementation.* The intent of this project is to ensure that businesses will have a way to support district programs, better connect with the district, and stay informed on educational issues impacting the community and state. The objectives are:
  - a. Develop a redesigned community partnership program to maintain compliance with state law (working with Business Services) and support schools with formal partnerships.
  - b. Conduct annual training to all administrators on properly seeking and facilitating partnerships.**ON HOLD |** In the fall of 2022, the communications team put this project on hold.
5. *Opportunities for district leadership to serve in advisory capacities for external not-for-profit entities.* The intent is to find and develop opportunities for district administrators for service on boards and advisory councils for education associations, non-profit organizations, and service organizations with connection or influence in the district or public education in general. Connections between the district and community organizations and associations will lead to greater community awareness of the work of the district while providing district leaders with greater professional growth opportunities. The project’s objectives are:
  - a. Develop guidance and provide support to all administrators on board service.
  - b. Develop training on an annual basis through the Aspiring Administrators program.**ON HOLD |** In the fall of 2022, this project was placed on hold and the communications team plans to start Summer 2023.

**Strategy 3 | Implement a system to effectively market schools and programs.**

The district currently does not have a formal marketing program and spends only a nominal amount per year marketing schools through print and digital channels. With current uncertainties around enrollment, this new Strategic Reset Plan and the goal to position ourselves as the head of the national table of PK-12 education, there is a need to develop a formal marketing plan for the Communications Department as well as a customized process and plan to support district programs.

In addition, while current enrollment as of this writing is at or slightly above pre-pandemic levels, the district continues to experience pandemic-related enrollment uncertainties, creating the need to attract and retain families to enroll their child(ren) as students in our schools.

**Goal:**

The comprehensive communications and marketing plan will support the Strategic Reset Plan and district initiatives.

**Supporting Project:**

1. *District-wide Strategic Marketing & Communications Plan development.* The intent is that the marketing plan will provide strategies for highlighting and promoting district initiatives and programs for external audiences. The objectives are:
  - a. Work with the cabinet leader and team to draft, implement and evaluate an external communications plan, timeline and budget for marketing the work and outcomes of the Mission Priorities and Transformation Drivers in the Strategic Reset Plan.
  - b. The Communications Team will have a process in place to review and determine (in coordination with cabinet) the need for a formal communications plan to highlight specific programs that will propel the district to the head of the table at the national level, including creating demand for programs and schools that have been faced with declining enrollment.

**IN PROGRESS |** The communications team is currently developing a plan in alignment with the first strategic plan update. Additional communication will be share in coordination with future public updates. Sharing updates in the district’s annual review, in press releases, on social media and through the award-winning Progress Report podcast, the comms team is able to keep all key stakeholders aware of the district’s progress.

## Comprehensive Funds/Resource Management

### Background

In support of all other strategic areas of the district, comprehensive funds and resource management strives to implement and sustain effective stewardship of community resources. As part of this work, the district focuses on ensuring that all areas of the district are supported with the resources needed to operate effectively and efficiently to the greatest extent possible within national, state, and local funding levels and associated requirements.

To ensure that the response to COVID-19 is as effective as possible, the U.S. Department of Education has focused on allocating resources in ways that ensure they are adequate for providing opportunities to students and supporting student needs. The district will accordingly evaluate the implementation of shared decision-making regarding resources and ensure resources are targeted to where they are needed most by reconsidering:

- How school budget allocations are determined.
- What resources are available.
- How resources should be allocated.
- The effectiveness of those resource allocations for improving educational opportunity and outcomes.

To address these needs the district plans to:

1. Transform the District's budgeting and resource management and allocation process from the current annual, incremental process to a hybrid program-based budgeting system.
2. Through collaboration throughout the district, continue to develop funding strategies that will support the strategic goals and of the district.

To accomplish these objectives, the district has identified the following strategies.

### Strategy 1 | Design and implement a long-range funding plan and process for Teaching and Learning, Facilities Master Planning, and other Mission Priorities and Transformation Drivers.

The success of all other strategies within the Mission Priorities and Transformation Drivers depends heavily on adequate funding and resourcing. The funding requirements that will emerge during this work to ensure learning disruption is addressed, the impacts of COVID-19 are mitigated, and Peoria is fully prepared to meet the demands of the post-pandemic world cannot simply be absorbed into current and forecast budgets. Therefore, this long-range funding plan and process must include federal grants, new sources of funding or the repurposing of existing funds to support higher priority strategic initiatives.

Many component strategies will have to be considered, including at a minimum the following:

- Near and long-term Bond and Override planning.
- Federal, state and private grant opportunities.
- District Additional Assistance (capital) planning.
- Identification of annual projects that must have budget consideration early in the budget process to be considered a priority during the annual budget development.
- Implementation of a formal governance process for making funding decisions and for progress monitoring and adherence to ongoing operational budget forecasts and plans.

### Goal:

To sustainably finance the district's operations as well as academic and instructional priorities in support of teaching and learning objectives in the near and long term, in turn supporting optimized student learning and success.

### Supporting Projects:

1. *FY 2022 Strategic Reset Plan Funding Requirements.* This project’s objective is to identify those Mission Priority and Transformation Driver projects that MUST begin in FY 2022 and to develop funding for each of those plan components.

**COMPLETE 2022** | To support the work of the Strategic Plan, this project was completed going into FY 2022.

2. *FY 2023 Strategic Reset Plan Funding Requirements.* This project’s objective is to determine funding requirements for all MP and TD projects scheduled for FY 2023 execution and to develop a funding plan for each.

**IN PROGRESS** | This aspect of the plan is continual and ongoing throughout the lifespan of the Strategic Plan.

3. *Annual Strategic Reset Plan Revision and Budget Development.* This project’s objective is, as part of the annual Strategic Plan revision process and annual New School Year process, to establish the process component for creating the Strategic Plan budget for the following fiscal year. More specific requirements for the processes associated with plan revision, execution, and progress monitoring are described in the last section of this document prior to the plan’s Conclusion section.

**IN PROGRESS** | This aspect of the plan is continual and ongoing throughout the lifespan of the Strategic Plan.

### Strategy 2 | Design and implement a formal Program Management and Evaluation Process.

Programs are the organizational and process implementation of the major functions of the district. They cover the full scope of academic, administrative, strategic, and operational activities. As Peoria Unified works to have a program-driven budget process to ensure that resources are used in the most effective way possible to address school and district needs, we will work to standardize and strengthen the district’s methods for program evaluation.

As part of the program definition and evaluation work, we will develop methods to track detailed costs on a program level to facilitate cost-conscious program evaluation, allowing resource allocation decisions to consider return on investment as well as other identified Key Performance Indicators.

The concept of formal program management and evaluation plays a role in the broader management and effectiveness of the district, whereby the organization can work toward continuous improvement in the pursuit of its mission and vision.

### Goal:

Develop a systematic and objective set of program-based Key Performance Indicators to track the district’s progress toward intended results and required strategic and operational improvement, as well as a basis for decision making and prioritization.

### Supporting Projects:

1. *Program Definition Implementation.* This project’s objective is to establish a formal “program” definition that will serve as the basis for the district’s Program Management function and process.
2. *Program Management and Evaluation Implementation.* The overall objective of this project is to implement the district’s formal Program Management function and processes. At a minimum, this includes the following objectives:
  - a. Recommend either Board Policy or staff regulation defining Program Management and mandating its use in Peoria Unified.
  - b. Establish a Program Evaluation and Governance team to provide oversight and decision making.
  - c. Establish and implement a schedule for applying the Program definition to all district functions, including proposed evaluation schedules for each program.
  - d. Design and implement modifications to the accounting structure to support identification of program costs.

**IN PROGRESS** | To support the work of this project, the Business Services team posted the Program Evaluator position to begin this work.

3. *Program Indicator Management.* The objective of this project is to set targets and to track progress against the target based on the identification of relevant criteria that provides meaningful and timely feedback on activity outcomes in alignment with program goals.

**ON HOLD** | In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.

### Strategy 3 | Implement a hybrid budget development process to replace the current incremental process.

The intent of this strategy is to replace the district's current incremental budget development process, which focuses primarily on the allocation of new annual funding, with a hybrid budgeting system. This hybrid budget model will incorporate annual program evaluations and funding requirements into the budget process, while maintaining sustained funding levels for those programs pending evaluation. It also mandates full program definitions, including proposed funding levels for new programs, along with offsetting program changes resulting from the program evaluation process.

The new hybrid budget development process will also incorporate the new annual Strategic Plan revision process to ensure that funding requirements in the Strategic Plan are identified and incorporated into the district's annual budget process.

Some specific hybrid budget development process characteristics include the following:

- Each fall, sustained, decreased, or increased funding is determined for selected and evaluated operating programs.
- Also in the fall, new program proposals are brought to district leadership for evaluation.
- Staffing changes (outside formula-driven changes) are considered in conjunction with program evaluations.
- Targeted compensation initiatives are identified in the fall each fiscal year to be evaluated by administration and the Budget Team during the budget process for the next fiscal year.

#### Goal:

Develop and implement a budget process with aspects of zero based and incremental budgeting that aligns funding and cost centers with short- and long-term financial forecasts and strategic goals and priorities.

#### Supporting Projects:

1. *Hybrid Budget Development Process Design.* This project's objective is to design a new budget development process.  
**IN PROGRESS** | This aspect of the plan is continual and ongoing throughout the lifespan of the Strategic Plan.
2. *Hybrid Budget Process Implementation.* Objective is full process implementation of the newly developed hybrid budget process.

### Strategy 4 | Acquire and implement modern data analytics and budget management tools to fully support district-level budget and finance needs and the needs of departments and site administrators.

To best support program evaluation and associated budget management, additional data and analytics changes will be needed to support this work.

The complexity of budget analysis, development, and monitoring is increasing. This strategy is intended to work in collaboration with the Data Leadership and the Management Transformation Driver in order to meet the needs of both financial/operations analytics and academics/school operations in the most cost-effective manner. This includes:

- A need to acquire or develop a modern data analytics system that is focused on forecasting and the management of financial assets to support program evaluation, increasingly complex state and Federal reporting requirements, revenue and expense forecasting, and facilities master planning.
- The development of a set of tools for administrators and staff to use to request and manage site/department level budgets in conjunction with the district's current Enterprise Resource Planning (ERP) system.

### Goals:

1. Define requirements that are needed to acquire and implement data analytics capabilities in support of business and operations data and associated analysis that is needed for decision making.
2. Develop or acquire budget management tools to support budget managers and clerical staff at schools and departments.
3. Develop integrated analytic and budget tool structures that empower district administration to analyze data in varying ways. A goal of the associated analysis is to leverage the district's data to develop strategies for managing limited resources and to achieve education outcomes while navigating internal and external budget factors and scenarios.

### Supporting Projects:

1. *Requirements definition for a data analytics system.* The objective of this project is to work with stakeholders across the organization to identify specific data analytics requirements required to support comprehensive funds and resource management including program evaluation.

**IN PROGRESS** | We are forming a plan and building a project scope of work to be able to kick off this data analytics project during the third quarter of the 2022-2023 school year.

2. *Development or acquisition of budget management tools.* The objective of this project is to determine if the district should develop or acquire the tools and resources needed to meet the data analytics requirements identified in the previous project and to implement that decision.
3. *Implementation of Data Analytic systems and required training and support.* This project will focus on the initial roll out of the data analytics solution identified including the training and initial support to ensure effective use of the analytic capabilities in support of program evaluation and budget and resource management.

### Strategy 5 | Develop strategies and projects for funding and financially sustaining a modernized and competitive compensation model.

The district's employees are the driving force for student success. As we consider how to address the challenges the pandemic created or exposed, and to be poised to respond to the opportunities of a post COVID-19 education environment, it is vital that the district is supported by a qualified, effective, and modern workforce.

Consequently, it is important for the district to consider how we recruit, develop, and retain employees (see the Workforce Modernization and Sustainability Transformation Driver). A key component to the district's recruiting and retention strategy is developing and financially sustaining a modern and competitive compensation model.

Prior to the Strategic Plan's reset, the district initiated a two-phase compensation study that reviewed and analyzed compensation levels, benefits, and job descriptions throughout the organization. This work has become part of a multi-year approach to implement compensation improvements for employees. This ongoing work should include new Strategic Plan priorities.

### Goals:

1. Develop a multi-year compensation strategy that ensures all employee groups are regularly evaluated from a compensation perspective during the budget process. This includes addressing compression and designing a compensation structure that is competitive both within public education as well as industry.
2. Develop a program level budget specifically designed to address recruitment, on-going staff professional development, and retention investments that are necessary to build and sustain a modern workforce.

### Supporting Projects:

1. *Compensation realignment with updated job descriptions.* This project will continue to review changing job responsibilities and revised job descriptions to identify employees that should have compensation adjustments.
2. *Comprehensive review of stipends and supplemental pay.* This project will have two priorities: The first is a focus on the evaluation of existing supplemental pay and stipends to determine where ongoing functions can be incorporated into revised job descriptions. The second is an evaluation of one-time and continuous recruiting and retention stipends.
3. *Support for competitive compensation across the organization that considers minimum wage increases.* The objective of this project is to address the compression of the district's pay schedules that has resulted from ongoing minimum wage increases required by Arizona's Proposition 206 that began in 2017.

**IN PROGRESS** | Human Resources, Business Services and the Budget Team are working together to address the minimum wage increases and the respective compression of pay schedules.

## Plan Components –Transformation Drivers

### Leadership and Organizational Development

#### Background

During the Strategic Reset Plan Reflect Phase (March of 2021) the team identified several needs and opportunities to improve leadership culture and accountability throughout the district, as well as needs for innovative staff development supports for all employee groups. For leaders/administrators, our Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis and discussions indicated that we should consider improvements to the mechanisms and leader development processes by which we set clear expectations and hold leaders accountable for meeting them. At the same time, the discussions suggested that implementing such practices as facilitated leadership and shared decision-making, along with strengthening the culture by which leaders take ownership of the decisions they make could result in substantial improvements to school and district outcomes.

During the pandemic and the several years preceding it, Peoria Unified has experienced significant leadership turnovers, from the superintendency through schools and departments. As a result, the “pool” of aspiring administrators has become limited, and the availability of experienced outside candidates for administrator positions has weakened as well. Leader development and succession planning is therefore a major focus within this Transformation Driver.

Overall, to meet our goal to “transform Peoria Unified to a new, re-imagined state that will meet the post-pandemic needs of our 21<sup>st</sup> Century students and community”, a major priority for the district is to develop and sustain a full and evolving team of leaders who embrace responsibility and decision-making and who possess the skills, aptitudes, and discipline necessary to generate the innovations and creativity required to meet that goal.

#### Strategy 1 | Design and implement a process to strengthen, sustain, and evolve the district's leadership and accountability culture.

The purpose of this strategy is to address the district's need to develop and further a culture of instructional leadership within each administrator and those wishing to serve in administrative roles. This process, to include greater conversation on accountability for student learning and the implementation of facilitated / shared leadership, will support the growth and creation of leaders that positively impact student learning and measured performance within the school district. Effective leaders will take ownership of their school's improvement plan process and embrace opportunities to take risks and gather buy in to make sound student-based decisions that impact and embrace student achievement for all students.

### Goals:

1. By the start of the 2022-2023 school year, the Peoria Unified Leadership team will collaborate with District leadership to create a defined Professional Learning Community (PLC) process for administration.
2. By the start of the 2022-2023 school year, the Peoria Unified Leadership team will develop a professional development plan for administrative training in facilitated / shared leadership.

### Supporting Projects:

1. *PLC Process implementation for administration/leadership development.* Establish a PLC process for administration development within Peoria Unified School District. This project has the following objectives:
  - a. Review past and current practices for professional learning communities for administrators as seen within the district.
  - b. Engage stakeholders to determine which pieces of data need to be consistently used within this PLC.
  - c. Create a schedule that will effectively allow for participation of administrators.
  - d. Design a consistently used agenda and format.**IN PROGRESS** | The PLC Process has started, and it is in place.
2. *Professional development plan for facilitated/shared leadership.* Develop a professional development plan for training in facilitated / shared leadership. This project has the following objectives:
  - a. Engage district leaders in review of literature on facilitated / shared leadership.
  - b. Establish relationships with businesses or with districts who serve as model of using the facilitated / shared leadership process.
  - c. In collaboration with Student Services and Academic Services, develop the district's plan for professional development to be used with district leadership during the 2022-2023 school year.

### Strategy 2 | Define and implement structures and programs for employee development and growth for all employee groups.

The purpose of this strategy is to address the district's two primary areas of employee development. First, a vital component of the district's transformation is development of highly effective leaders who take full ownership of the decisions they make, are transparent and collaborative with their communities and their own staff, and who fully embrace being held accountable for their actions.

Second, and also important, to the transitions described in the Strategic Reset Plan is the need for administrative, certified, and classified staff at all levels to have the means to have their voices heard and to participate in student-centered, shared decision-making. The district will support all employee classification groups and create channels for all employees to grow, be mentored, and build leadership skills while also having a voice in the shared decision-making process that is embraced in our district.

### Goals:

1. By the 2022-2023 school year, the Peoria Unified Leadership team will research and revitalize an Aspiring Administrator's Academy for certified staff to increase the internal pool of innovative and highly desirable candidates.
2. By the end of the 2021-2022 school year, Peoria Unified will research and more clearly define the expectations for investing in employee resource groups (ERG's) to enhance employee engagement, positively support employee groups, and improve the overall workplace in Peoria Unified.

### Supporting Projects:

1. *District Leadership Development Academy (Aspiring Administrator Academy).* Establish the Peoria Unified School District Leadership Development Academy. This project has the following objectives:
  - a. Review past and current practices for leadership development within our district.
  - b. Explore successful models of leadership development in other school districts.
  - c. Gather input from employee groups on areas of interest within leadership development.
  - d. Engage successful leaders in conversation about implementation strategies to be used in Peoria Unified.

e. Develop timeline for implementation and roll out of growth opportunities for various employee groups.  
**IN PROGRESS** | The Aspiring Administrator Academy has been started and this year's cohorts have begun.

2. *Employee Resource Groups*. Support the establishment of additional Employee Resource Groups (ERGs). This project has the following objectives:
  - a. Using feedback gathered in Project 1, begin to determine the types of groups that leaders may encourage or establish.
  - b. Select points of contact for establishing / facilitating the ERGs or seeking outside guidance/consultancy. In partnership with Public Relations, find natural ways to communicate the purpose, descriptions, and meeting information for the ERGs.

**ON HOLD** | In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.

## Workforce Modernization and Sustainability

### *Background*

As with Leadership and Organizational Development, the Reflect and Re-Imagine work completed by the Strategic Reset Plan team clearly indicated that over time, the district's ability to attract, hire, develop, and retain a thriving workforce with modern skills and innovative aptitudes has lagged our needs. In particular, the COVID-19 pandemic revealed that skills with technology, especially for virtual collaboration and teaching and learning, were lacking.

The transformative nature of Peoria Unified's Strategic Reset Plan clearly requires a workforce capable of initiating and sustaining such a transformation. That workforce requires 21<sup>st</sup> Century skills and capacity for innovation and creativity. Rapidly changing needs further require a modern organization structured for flexibility and nimbleness.

Over the years, budget cuts and other forces have resulted in compensation levels in virtually all employee groups that are not competitive, even with neighboring school districts, let alone other industries. Moreover, district position descriptions have become out of date and not fully representative of the actual work currently being done, as well as new types of work that need to be addressed.

The district embarked on a Compensation Study that produced a great deal of valuable information. While incremental improvements to pay and benefits have been approved and implemented as a result, much work remains to be done to attract and retain the highest quality workforce.

The Strategic Reset Plan contains several strategies and projects designed to continue this work, as described in the following sections.

### **Strategy 1 | Develop and Implement a clear, consistent, and modernized organization, classification, and competitive compensation structure.**

Building on the already-completed two phases of the Compensation Study, the purpose of this strategy is to ensure that all staff employee position descriptions are not only aligned with the work expected of staff, but that those descriptions reflect the skills and knowledge expectations of 21<sup>st</sup> Century staff. The purpose is also to review the organizational structures within the district to find ways to eliminate the "silos effect" and to align structures and responsibilities with the district's strategic directions. A final purpose of this strategy is to research other modern organizations to determine and implement structural and behavioral changes that will promote organizational flexibility and nimbleness.

#### *Goal:*

1. By the end of the 2021-2022 school year, all job descriptions will be updated and aligned with expectations designed to fulfil the 21<sup>st</sup> Century transformative needs of the district. Job descriptions will then be used to analyze, identify and prioritize initial salary classification and grades within Peoria Unified's salary schedules.

2. By the end of the 2022-2023 school year, a comprehensive multi-year plan is in place and execution begun to bring the district's compensation/salary schedules to levels that are competitive with neighboring districts and, to the extent possible, comparable industries.

*Supporting Projects:*

1. *Modernized Organization Research and Definition.* Research and define a "modernized" organization. This project has the following objectives:
  - a. Explore varied resources such as articles and professional development opportunities through organizations such as Society for Human Resource Management (SHRM) and American Association of School Personnel Administrators (AASPA) to define the components of a "modernized" organization.
  - b. Engage a stakeholder group to process the information and to gather the collective voice of the organization.
  - c. Develop and plan for prioritizing and implementing strategies as created by the stakeholders.
2. *Salary Schedules and Leveling Updates.* Consider and create changes to salary schedules and leveling systems for all employee groups.
  - a. Obtain salary schedules from neighboring school districts.
  - b. Modify and create new classification systems for like/similar jobs.
  - c. Modify and create new and competitive salary schedules.
  - d. Develop a comprehensive plan for changes of classifications and salaries.
  - e. Consult with Third-party on recommended changes.

*Strategy 2 | Re-imagine the district's recruiting and hiring practices.*

The transformative nature of Peoria Unified's Strategic Reset Plan clearly requires a workforce capable of initiating and sustaining such a transformation. To ensure that the organization has a workforce that is prepared to drive this transformational process, our methods for recruiting and hiring employees must similarly transform. To help support this effort, we will be reviewing the hiring process in its many stages including recruiting, tracking of applicants, and the training that our leaders receive in building their teams.

*Goal:*

1. Modernize the organization's recruiting software tools and hiring processes to increase attraction rate, reduce time to hire qualified applicants, and provide an efficient onboarding experience; thus, ensuring the organization has the workforce it needs to meet and sustain its strategic objectives.

*Supporting Projects:*

1. *Review of Applicant Tracking Systems (ATS).* Compare and contrast Applicant Tracking Systems (ATS) commonly used in "modernized" workplaces in conjunction with a suite of Human Resource Information Systems (HRIS). This project has the following objectives:
  - a. Create a taskforce to support the review of ATS and onboarding systems.
  - b. Survey current users and new hires to determine strengths and weaknesses of our current ATS/onboarding system.
  - c. Partner with business services to consider the creation of an RFP or RFI for information sharing with the taskforce.
  - d. Engage representatives of ATS' to showcase product and demonstrate capacity.
  - e. Determine if we remain with current ATS or develop a plan for implementing a new ATS.
2. *Professional Development.* Provide professional development to administrators and hiring managers on best practices for recruiting, hiring and retaining staff. This project has the following objectives:
  - a. Create and define best practices from Human Resources for recruiting and hiring employees.
  - b. Develop training module(s) for leadership.
  - c. Partner with Curriculum & Professional Development to schedule trainings.
  - d. Consider virtual and face-to-face methodology for offering of training.

- e. Train relevant leadership.
- f. Collect evidence from HR team members on how our leaders are doing.
- g. Evaluate process and training and determine next steps.

### Strategy 3 | Maximize the benefits and usability of the Performance Evaluation System.

As part of a comprehensive employee and workforce development approach, the district will be evaluating the way employee performance is reviewed. This is a significant component to ensuring that the organization’s workforce is as effective as possible.

In reviewing the staff performance review process, specific attention will be given to looking at the consistency and relationship between employee evaluative results and areas of student success and achievement to ensure that our performance evaluation process is measuring progress toward desired objectives and outcomes. As part of evaluating the performance review process, we will also review the tools we use to facilitate the process to help ensure the success and effectiveness of the process.

#### Goal:

1. By the end of the 2022-2023 school year, all Peoria Unified administrators will be held to the same high expectations for decision-making, transparency, and accountability, as defined and measured yearly in the administrator evaluation instruments.
2. Implement best practices in staff and performance review to drive strategic outcomes, employee development towards modernizing the district’s workforce.
3. All Peoria Unified staff at all levels are valued, and heard, as measured in annual staff satisfaction surveys with an 85% survey completion per site.

#### Supporting Projects:

1. *Staff Performance Review.* Evaluate and modify tools used for review of performance. This project has the following objectives:
  - a. Review data of performance by employee category and tool.
  - b. Determine if there are inconsistencies in performance of staff compared to measured areas of student success: student achievement, grades, etc.
  - c. Ensure that the tools measure what we see as desired outcomes.
2. *Performance Systems Review.* Evaluate Performance Review System / Software. This project has the following objectives:
  - a. Gather feedback from users.
  - b. Establish conversation with Information Management & Technology (IMT) staff on possible changes.
  - c. Compare and contrast other evaluation systems / capture tools in conjunction with a suite of Human Resource Information Systems (HRIS).
  - d. Finalize recommendations and establish timelines for enhancement and / or implementation of new product with the IMT Department.

### Strategy 4 | Develop, implement, and communicate a modern plan for supporting flexible workspace and remote connection.

The coronavirus pandemic presented unique challenges that showed many organizations, Peoria Unified included, that work that had been traditionally completed in person could effectively be completed remotely. This realization has encouraged us to consider the practice of telecommuting, both as a way to address public health concerns as well as an effective recruitment and retention practice.

#### Goal:

Develop and implement an effective telecommuting program to support District employees and district objectives.

### Supporting Projects:

1. *Staff Telecommuting*. Review and revise current Telecommuting Agreement. This project has the following objectives:
  - a. Establish stakeholder group to review current practices and documents.
  - b. Establish / Define guidelines for use / expectations for team members, to include subgroups of eligible employees.
  - c. Consider the various needs to implementation: technology, budget, etc.
  - d. Consider connecting to Governing Board Policy / Regulation / Exhibit.
  - e. Consider adding to various job descriptions.
  - f. Place finalized product in Employee Handbook.
  - g. Assess how the Telecommuting Agreement (s) impacts workspaces (Shared workspaces).
2. *Revised Telecommuting Agreement Implementation*. Implement revised Telecommuting Agreement. This project has the following objectives:
  - a. Collaborate with Public Relations on communications plan / roll out.
  - b. Training administrators on use of plan and process.
  - c. Consistent location / plan for record keeping and accountability.

## Data Leadership and Management

### Background

As a critical component of achieving Peoria Unified's Strategic Reset Plan goals, the Superintendent has directed the district to maximize making student-centered, data-driven decisions. Every component of the plan includes work and resources designed to use high-impact data and analytics to not only recover but to fully transform the district.

Achieving the goal of effective and safe use of data requires development of new district-wide processes, capabilities, and resources, as well as support for each of the plan's specific strategies and projects. Therefore, the work required by this plan component is geared toward specific supports to the district's highest priority initiatives as well as district-wide support for improved efficacy and capacity in the use of data to drive outcomes.

The purpose of this plan component is threefold.

1. Through collaboration with the other Mission Priority and Transformation Driver teams, determine and implement data and analytics capabilities required to both support and transform how each of those components meets its strategic goals.
2. Assess and promote district-wide capacity for and a culture of proactive and effective data-use.
3. Define and implement a Peoria Unified Data Leadership and Management program.

Data management approaches, initiatives, etc. are often difficult to understand or to imagine their application to the district's work when they are not presented in conjunction with specific supported work processes. For example, it can be difficult to understand the meaning and value of a Data Glossary or Master Reference Data Management when not applied to a specific issue, such as standardizing facility room numbers across all information systems. Therefore, the timing of some of the projects specified in this plan component is dependent on the timing of other plan component projects.

### Strategy 1 | Develop and sustain a positive and proactive, districtwide Data Leadership Culture.

The Superintendent's focus during all the strategic planning work includes the use of data, not only to make decisions but also to solve problems and drive outcomes. Creating that singular focus throughout the district can be described as leading to a culture of proactive data usage. Sustaining that focus over time requires leadership; hence, this strategy is about developing and sustaining a healthy and effective *Data Leadership Culture*. The following bullets describe the six components necessary to developing and sustaining such a culture:

- Design and implement ongoing data literacy training.
- Improve data access and enablement, including examination of ways that we can increase access to valuable and actionable data without violating privacy and security concerns.
- Develop incentives and accountability measures – including revisions to evaluation instruments – that set expectations for effective data use. *NOTE: This will be addressed in collaboration with the Workforce Modernization Transformation Driver.*
- Implement and sustain effective Data Quality practices.
- Establish common (i.e., districtwide standard) Vocabulary, Metadata, and Reference Data Management.

*Goal:*

Improve data efficacy and capacity across all employee groups by 75%, as measured by an annually administered data culture assessment, by the end of SY 2023-2024.

*Supporting Projects:*

1. *Data Leadership Culture Assessment.* This project’s objective is to develop and administer (baseline, followed by annual assessments) an assessment of the district’s Data Leadership Culture. The assessment will address at least the following components of data culture:
  - Data Literacy – the level of skills possessed by staff
  - Data Trust – assessment of employees’ ability to easily access required data and the perceived and objective reliability of the data.
  - Data Usage Expectations – the levels to which employees feel that they are expected to use data, and the extent to which leaders and supervisors require their teams to use data.
  - Data Usage – the levels to which data are *actually* used on a recurring and routine basis.

The specific project objectives are:

- a. Design a “Data Culture Assessment Protocol” and instrument.
- b. Administer the first baseline assessment and a schedule for annual assessments and analysis of results.
- c. Develop analyses of each assessment’s results and recommendations for improvement.

**ON HOLD |** In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.

2. *Data Literacy professional development.* This project’s objective is to develop and deliver training/professional development in the effective use of data. The training will consist of modules that are designed for administrators (district and site), classroom teachers, supervisors, and other classified staff. The project will start during the second semester of SY 2021-2022 and will deliver the first two modules during the first semester, SY 2022-2023. The remaining modules will be delivered during the second semester, SY 2022-2023. At a minimum, each module will address (appropriate to the module’s staff level) how staff can successfully and routinely use data to:
  - a. Define and solve problems
  - b. Make decisions
  - c. Gain valuable insights
  - d. Improve results

The project’s final objective is to integrate these PD modules into the district’s overall staff professional development program to sustain appropriate skill levels among all staff.

3. *Data Access review and revisions.* This project’s objective is to conduct a re-examination of the district’s current practices regarding levels of access and access controls associated with key data sets (e.g., student data, financial records, personnel data, etc.) for the purpose of determining whether and how we can extend access to a wider set of users who can make appropriate and productive use of the additional data without violating laws and/or policies or putting at unacceptable risk the privacy and security of the data. And, in those cases where additional access can be safely extended, put those changes into effect.

While access to additional data could be immediately useful, we need to exercise great care before extending access. Also, we need to be mindful of just how much data access staff can effectively absorb, especially given that other Strategic Reset Plan projects will no doubt create additional data usage demands early on for staff. Finally, it is likely that some or all of the new or improved digital systems will serve to expose data demands, and that information will be a useful part of this project's data access examination.

Therefore, this project will commence in the spring semester of SY 2021-2022 and continue into the first semester of the following year, making recommendations and, upon appropriate approvals, implementing access changes for project-related data sets as required.

4. *Data Quality practices implementation.* This project's purpose is to design and implement district-wide standards and practices for ensuring the quality of critical data. Without question, (poor) data quality is the root cause of most data and information problems. Further, lack of data quality standards is one of the primary reasons for the inability to create a healthy data culture. At least as importantly, poor data quality can and does routinely cost the district substantial funding associated with state reporting and grant compliance (along with negative audit findings).

Data Quality is a complex topic about which much has been written. For purposes of this project, we will limit our focus to *critical data as defined by Mission Priorities and Data Analytics projects* and to the following Data Quality dimensions:

- a. Intrinsic Quality (e.g., accuracy)
- b. Contextual Quality (e.g., relevancy, completeness, timeliness)
- c. Usefulness Quality (e.g., Interpretability, ease of understanding, accessibility, security)

In terms of scope of work, the project will achieve the following objectives:

- a. Definition of Data Quality standards.
- b. Specification of practices associated with ensuring the ongoing quality of data – i.e., making sure that operational processes include practices necessary to sustain the quality of data specified by the standards.
- c. Requirements for monitoring and assessment of Data Quality practices.

This project will begin in the second half of SY 2021-2022 and will continue through the plan years, depending on specific MP/TD data needs. Definition of standards, practices, and oversight procedures will be complete and documented by the end of SY 2022-2023.

**ON HOLD** | In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.

5. *Data Definition standards and practices implementation.* This project is a companion to the Data Quality project above. Standards and practices identified and implemented will contribute greatly, not only to data quality but also to the levels of understanding and effective use of data districtwide.

As with *Data Quality*, this project will focus its efforts on data requirements identified in the various Mission Priority and Transformation Driver projects. Hence, some work may begin during SY 2021-2022, but the project will formally commence the following school year and continue through SY 2023-2024.

The project will develop and implement standards and practices in the following areas:

- a. Implementation of a districtwide *Data Glossary*.
- b. Definition of *Metadata* standards and practices.
- c. Implementation of *Master Reference Data* management

**ON HOLD** | In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.

## Strategy 2 | Implement Data Analytics tools/solutions in support of Strategic Reset Plan Mission Priorities and Transformation Drivers.

In keeping with the Superintendent’s focus on data, each of the strategies and projects identified in the Mission Priorities and Transformation Drivers will create demand for comprehensive, timely, and accurate data for use in problem solving and decision making. The purpose of this strategy, then, is to collaborate with the other MP and TD teams to determine and implement the specific data analytics capabilities required to both support and transform how each of those components meets its strategic goals.

A core requirement for each of the MP/TD strategies and projects is identification of specific data and data analytics capabilities required. Such identification is a complex task and always requires collaboration outside the boundaries of each specific project. As part of the Data Leadership and Management TD, the opportunity here is for this strategy to positively *transform* how the other MP/TD projects identify and use data.

Given the complex, multi-source nature of data analytics, another vital part of this strategy is coordination with the Data Quality, Data Definition Standards, and Data Lifecycle Management strategy teams to ensure that the requisite source data systems are identified – and, if necessary, put in place – and the technical data integration and modeling systems are put in place to enable analytics capabilities.

Measuring the impact and value of data and analytics in problem solving and decision making is notoriously difficult, given that many non-data factors significantly affect those processes in unclear ways. That challenge notwithstanding, we plan to implement various project-level measures that do provide reasonable indications of the return on this investment.

### Goal:

Utilizing system usage data and surveys of administrators and end users, improve the levels of satisfaction with how data and analytics have positively affected problem solving and decision outcomes.

### Supporting Projects:

1. *Data Analytics research and needs determination (FY 2022 and 2023)*. This project has two objectives:
  - a. Work with the other MP/TD projects to identify general and specific needs for data and data analytics capabilities. Use this information to also generalize and project data and analytics needs for priority areas within the district.
  - b. Research the product marketplace for currently available tools and solutions that could potentially meet all or parts of the needs identified in letter “a” above.
  - c. While research and needs identification will continue through FY 2022 and beyond, this project’s work must be far enough along by spring of 2022 to inform the work of Project 2 – *Data Analytics Acquisition Plan* – below.

**IN PROGRESS** | We are forming a plan and building a project scope of work to be able to kick off this data analytics project during the third quarter of the 2022-2023 school year. We will be building our own cloud data repository.

2. *Data Analytics Acquisition Plan (Beginning Semester FY 2022)*. In general, this project’s objective is to formulate a plan for acquiring and implementing data analytics capabilities identified in Project 1. The specific approach to this depends on the outcomes from parts “a” and “b” of Project 1. Overall, there are two fundamental questions the answers to which will impact how this project proceeds:
  - a. Based on MP/TD data and analytics needs identified through Project 1, determine whether the district should plan to implement a single, broad-scope analytics solution that addresses all those needs, or whether the district should implement a small number of narrower-focus analytics systems, each of which addresses more targeted requirements (for example, a “teaching and learning” analytics system and a “facilities planning” analytics system).
  - b. Based both on identified needs and available commercial products, determine whether the district should license one or more commercial analytics products, or whether it should build the solutions internally.

c. Answers to these questions will affect the nature of the plan(s) developed in the project. The acquisition plan is to be completed and ready to execute during the first semester, SY 2022-2023.

**IN PROGRESS** | We are forming a plan and building a project scope of work to be able to kick off this data analytics project during the third quarter of the 2022-2023 school year. We will be building our own cloud data repository.

3. *Implementation of Data Analytics solution(s) (SY 2022-2023 and 2023-2024).* As indicated throughout this strategy section, the exact nature of this project will depend on outcomes, information, and decisions made during several other projects. The timing of the project (or projects) may vary from this projection based on those results.

### Strategy 3 | Implement a Data Lifecycle Management Program.

Data Lifecycle Management (DLCM), as defined in professional literature, is quite broad in scope; so, for the purposes of this strategy we propose to limit its scope to its components that are currently most important to the work of the district and Strategic Reset Plan. Following is the subset of DLCM components that we intend to address within this project:

- Data Acquisition, or “On-Boarding” – in coordination with all projects and specifically with Strategy 1, Projects #4 and #5.
  - Capture
  - Inventory, Cataloging, and Classification
- Data Access – in coordination with Strategy 1 and the IT Modernization TD, Strategy #5.
  - Overall Storage and Retrieval
  - Enterprise Content Management
- Data Movement.
  - Communication
  - Encryption
  - Sharing and Transfer
- Data Retention and Destruction – in coordination with all projects, focusing on statutory retention, public records requests, and archival requirements.
  - Archival
  - Preservation
  - Requests for Public Information
  - Disposal

Based on progress and achievement of objectives defined for the four projects below, we will propose initiating additional projects in years beyond SY 2023-2024 to address additional important DLCM components.

#### Goal:

Data Lifecycle Management is formally defined and implemented by end of FY 2023. At a minimum, data inventory, cataloging, and classification practices are in place district-wide; an Enterprise Content Management system has been acquired and implementation has begun; data encryption protocols are documented and being enforced; software tools have been acquired in support of the district’s Public Records Request function; the district’s official Records Management Program is defined and implemented, along with official designation made of the district’s Records Officer.

#### Supporting Projects:

1. *Data Inventory, Cataloging, and Classification.* This project has two primary objectives:
  - a. Develop or acquire and implement a Data Glossary system that identifies all data assets (objects) and where they are stored.
  - b. Develop and implement a Data Classification program (protocols) that specifies the sensitivity levels of data, connects those levels to access controls, and establishes archival and retention protocols for each data object/type.

The district will use the data-related work of the Strategic Reset Plan projects starting in FY 2022 to begin defining specific needs and processes for this project. The work to obtain and implement the Data Glossary system will commence the following year, with the first semester being spent defining specific Data Glossary requirements and the second semester spent acquiring or building it.

Likewise, the district will use the data collection and management needs of Strategic Reset Plan projects during the 2021-2022 and 2022-2023 school years to define, test, and refine the Data Classification program. Implementation using targeted data domains will follow in SY 2022-2023 and beyond.

**ON HOLD** | In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.

2. *Enterprise Data and Content Management System and Protocols*. This project supports virtually all other data-related projects. It has the following two primary objectives:
  - a. Develop and implement data and content storage protocols and procedure guides. In brief, the purpose is to define where specific types of data and (unstructured) content should be stored and maintained. Inputs from SY 2021-2022 and beyond projects will inform this project, which will formally run during FY 2023.
  - b. Develop or acquire an Enterprise Content Management System (ECMS) for storage and management of primarily unstructured content (i.e., documents, audio/visual files, etc.). Determination of requirements will take place during second semester SY 2021-2022, with implementation taking place during FY 2023 and beyond. Strategy 5 within the IT Modernization Transformation Driver contains additional projects that are both related to and required for this project to be fully achieved.

The district maintains an enormous amount of paper documents that must be digitized and properly managed. Storage protocols will be designed to give both staff and students direction and advice regarding the most effective ways to store data and content.

Implementation of an Enterprise Content Management System (ECMS) is vital for management of unstructured content, such as documents and audio/visual files. Most importantly, the ECMS will give the district an effective storage and retrieval platform for the enormous amount of paper documents that exist.

**ON HOLD** | In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.

3. *Data Communications and Transfer Protocols*. To further reduce cybersecurity and privacy risk, this project has the following objectives:
  - a. Review and improve existing Governing Board Policy and existing procedures for sharing of data with external entities by Winter Break, 2021.
  - b. Develop protocols and mechanisms for encrypting of sensitive data while being communicated, especially outside the district's secure network environment. This project will be executed and completed during SY 2023-2024.
4. *Data/Records Management Program Implementation, Phase II*. The purpose of this project is to complete the work begun under Phase I, bringing the district into full compliance with Arizona Revised Statutes regarding Public Records and Records Management.

Phase I of this project is already under way (using district funds and staff resources), including the conducting of surveys and legal/policy research to form the basis for the district's Data/Records Management Program. Results from that work will inform Phase II, which by the end of SY 2022-2023 will deliver a fully defined and operational program whose outcomes are measurable and that brings the district into legal and policy compliance.

Phase II objectives are:

- a. Designate a district Records Officer, as required by A.R.S. §41-151 *et seq.*
- b. Develop and administer to a substantial subset of schools and departments a records management & compliance assessment.
- c. Based on the assessment results, develop training and assistance visits to sites.
- d. Develop an annual records management assessment schedule.

**ON HOLD** | In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.

5. *Public Records Request Search, Analysis, Redaction, and Reporting Software Acquisition*. This project's objective is to improve the district's Public Records Requests process by acquiring and implementing a modern software system for conducting precise information searches, organizing and analyzing results, performing required redactions, and packaging results for release. The current volume of Public Records Requests is requiring the district to add additional staff positions whose sole purpose is to process requests in an efficient, accurate, and timely manner. There are three phases to this project:
  - a. Conduct research regarding current products that perform these functions.
  - b. Execute a formal RFP/RFQ process to acquire a suitable system.
  - c. Implement the acquired system and train staff appropriately.

**IN PROGRESS** | In the fall of 2022, the communications team and IMT worked to research and purchase a public records request system and will begin the rollout in the spring of 2023.

#### Strategy 4 | Implement a Data Leadership and Oversight Program and Council.

The success of this entire Transformation Driver and of the data usage and analytics components of the other Mission Priorities and Transformation Drivers heavily depends on successful achievement of this strategy's goals. Further, successful execution of this strategy's projects will bring the district into compliance with one of the most important requirements specified in Governing Board Policy EH - DATA MANAGEMENT (SECURITY GOALS AND OBJECTIVES):

*Establish a formal governance process that ensures accountability and transparency and involves appropriate stakeholders in decisions and actions taken with regard to data management and security. (Policy Objective #2)*

Data Leadership and Oversight – as an ongoing program – is a widely adopted best-practice in both the private and public/governmental sectors. Its primary purposes are the following:

- Promote and develop a data culture for effective, appropriate, and safe use of data to maximize performance throughout the district.
- Support development of staff capacity and efficacy in data-informed decision-making.
- Maximize effective data decisions and prepare recommendations for the Superintendent to ensure effective data leadership and management program implementation, execution, and continuous improvement.
- Ensure compliance with relevant federal, state, and local laws, policies, and regulations.

Data Leadership and Oversight implementation in Peoria Unified ensures that data-focused goals and processes implemented in the other Mission Priority and Transformation Driver strategies remain in place and are strong and effective over time.

The primary mechanism for meeting the goals of this Transformation Driver and of effective data leadership and management across the district is establishment of the Data Leadership and Oversight Council (DLOC). This standing group consists of a cross-section of carefully selected individuals, at all district levels, whose charter is to ensure data leadership and management goals and strategies, along with legal compliance, are achieved and sustained.

Oversight of those projects is part of the DLOC charter and important to the Strategic Plan and successful ongoing data leadership and management projects. We propose establishing the DLOC – at least an operating subset – early in the second semester of SY 2021-2022 for this purpose.

#### *Goals:*

1. The Data Leadership and Oversight Council is established and officially chartered by end of second semester SY 2021-2022.
2. A DLOC project oversight structure is designed, by end of second semester SY 2021-2022, that will guide and ensure progress of all data-related projects.

3. A working set of Key Performance Indicators (KPIs) to be used for measuring data leadership and oversight effectiveness is established, specifically regarding this Strategic Reset Plan and generally throughout the district.

*Supporting Projects:*

1. *DLOC Implementation and Charter.* This project has three primary objectives:
  - a. Develop and obtain approval for the DLOC Charter and Structure.
  - b. Identify, obtain participation agreements, and commence operation for a specified subset of the total DLOC membership.
  - c. Develop and implement data project oversight protocols and mechanisms.

**ON HOLD** | In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.
2. *Data Leadership and Oversight KPI Implementation.* This project's objective is to develop specific Key Process Indicators (KPIs) for use in measuring effectiveness of data leadership and management outcomes and processes. The intent is that these KPIs shall be appropriately implemented as part of each data-related project and program going forward throughout the district.

**Strategy 5 | Establish a Data Leadership and Management organizational structure and base capacity.**

For some time, most industries and many governmental entities throughout the nation have championed establishing data leadership and management at the highest executive leadership levels within their organizations. This represents the realization and commitment that data is a valuable asset to those organizations, in much the same way as financial and real assets are of great value. Therefore, not only must appropriate management controls be implemented and overseen to protect those assets and to address compliance requirements, but real leadership must be present to create efficacy and capacity to use data assets throughout the organization. Private and public entities that have established senior data leadership and capacity have commonly demonstrated significant value and positive returns on those investments

School districts, including Peoria Unified, have traditionally relied on a single person or small department, such as a Research and/or Accountability Department, to *gather and provide* data to administrators and other users through reports and various analyses. This not only does not create the skills and capacity for teachers, administrators, and other staff to access and use data themselves, but despite best intentions it also creates a data access bottleneck.

Expectations and plans for extensive data and analytics usage throughout this plan require that we establish leadership and support capacity to ensure that those expectations are met and to create the level of data efficacy and capacity among all administrators, certified, and classified staff required to meet the transformative goals of our Strategic Reset Plan.

While C-level data executives are common throughout industry and some governmental entities, we do not at this time recommend that a Cabinet level position for Data be established. We do, however, include in this plan a recommendation to establish a leader at the director level, along with a small department (eventually 3-5 staff) to support this vital role. A recommendation for organizational placement of this department will be determined as part of the implementation project.

*Goal:*

As part of the annual budget process for SY 2022-2023, the Director level position and at least one additional analyst/clerical position will have been established and those two positions filled.

*Supporting Project:*

1. *Data Leadership and Management Department Implementation.* See explanation above in Background.

**ON HOLD** | In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.

## IT Modernization

### Background

During both the Reflect and Re-Imagine phases of the Strategic Reset Plan process, participants expressed concerns about either the lack of sufficient technology or the lack of effective use of existing technology. Lack of access to adequate technology tools came up within the Reflect Phase SWOT analysis as a weakness, and the availability of newer technology came up as an opportunity. Also, the “21<sup>st</sup> Century” theme was a part of much of the team’s conversation during the Reflect and Re-Imagine Phases. Finally, we received substantial feedback from the community during the two Parent Engagement Forums that the district needs to invest more heavily in modern technology (both devices and curricular software) for students.

Additionally, the district’s IT leadership and risk management staff are fully aware of the continually increasing threat of cybersecurity attacks. Not only are the number and sophistication of these attacks increasing, but public education has become one of the most frequently attacked enterprises nationally. Finally, rapid growth in the number of students and staff working remotely has greatly increased the complexity of the IT security landscape. New IT infrastructure architectures and systems that are built to directly deal with remote network connections and computing are now becoming available.

Thus, this Transformation Driver – *IT Modernization* – is one of the four TDs specified in the Strategic Plan Reset Framework.

The purpose of the IT Modernization plan component is threefold:

1. Through this team’s own work and through collaboration with other MP/TD teams, execute strategies and projects that will directly support and transform how those MPs and TDs will accomplish their goals using modernized technologies and technology practices.
2. Execute innovative and transformative IT strategies and projects districtwide that will improve performance outcomes, maximize cost-effectiveness maintain IT security, and minimize risk.
3. Transform/evolve district IT infrastructure, information and communication systems, and IT training and support services to sustain an effective 21st Century environment for on-premises and remote teaching, learning, and work.

### Strategy 1 | Implement an integrated digital teaching and learning platform.

The strategies defined for the Re-Imagined Teaching and Learning Mission Priority address significant needs for technology and data to support student virtual choice options, reinvention of the classroom and classroom supports, and innovation in academic programming. We know from our Reflect and Re-Imagine phases that teachers and building administrators often feel overwhelmed at the number of processes and tools already in their environments; the teaching and learning strategies in this plan will undoubtedly result in more, by expanding use of existing tools and development or licensing of new instructional and data capabilities and processes.

For this technology-rich environment to be both understandable and effectively usable it is important that tools and resources be as seamlessly integrated as possible. Achieving that level of integration and usability over the next few years is the purpose of this strategy.

Conducted in close coordination with the Re-Imagined Teaching and Learning MP, the specifics of the integrated platform will be developed in Project #1. In general, the following points provide a preliminary description of the features/capabilities:

- Equally and consistently supports both in-person and virtual teaching and learning.
- Provides easy access to curriculum, instruction, and assessment tools and resources.
- Provides rich support for formative assessments and small group instruction.
- Provides descriptive and prescriptive analytics for supporting academic and behavioral interventions (MTSS).
- Is fully integrated with the Student Information System and the Gradebook.

- Includes readily available quick training and tips.
- Provides a single place to go to access multi-source data and analytics pertaining to teaching and learning.

*Goals:*

1. Early in the plan cycle, a comprehensive needs document is developed describing the required capabilities of the platform.
2. Subsequently, a full development/acquisition timeline and objectives for the platform is developed.
3. Immediately thereafter, development/acquisition projects are scheduled and executed to acquire and implement the platform's component systems and content stores.

*Supporting Projects:*

The three projects listed below follow a normal system acquisition model, with needs determination, acquisition via RFP or other suitable method, and implementation.

1. *Integrated Teaching & Learning (T&L) Platform Needs Determination.*
2. *Integrated T&L Platform Acquisition and Implementation Schedule.*
3. *Integrated T&L Platform Acquisition and Rollout Projects.*

**Strategy 2 | Implement an integrated site safety, security, and energy management system.**

This strategy is described under Strategy 1 in the Safe and Welcoming Schools Mission Priority.

*Goals:*

1. Facility fire control systems, HVAC/energy management systems, electronic locks, and surveillance cameras are integrated and running over an isolated segment of the Peoria Unified network.
2. Data from all system sensors are centrally (i.e., district) managed and monitored and are available in an integrated console by appropriate staff and, when appropriate, law enforcement officials.
3. Threat detection software is implemented to analyze the sensor data and alert on perceived threats.

*Supporting Projects:*

This project work is highly technical and will be performed primarily by district staff with some design and engineering assistance from external contractors.

1. *Network Segmentation to Support Surveillance, Security, and Energy Management.*  
**IN PROGRESS** | This project is near completion and will be completed during the third quarter of the 2022-2023 school year.
2. *Upgrade/Replace Digital Door Locking Systems.*  
**ON HOLD** | In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.
3. *Surveillance, Security, and Energy Management Monitoring and Reporting System Implementation.*  
**ON HOLD** | In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.
4. *Advanced Threat Detection System Implementation.*  
**IN PROGRESS** | This project has started and will be completed by August 2023.

**Strategy 3 | Devise and implement an integrated parent portal.**

Currently it can be frustrating for parents to gain access to information about their students and/or about school and district events, forms that need filling out, curriculum, and instruction information, etc. The major reason for confusion is that there are multiple non-coordinated sources for this information, some of it digital/electronic and some paper based. This was another area of strong feedback from parents during the Parent Engagement Forums.

As more paper or email and attachment-based information becomes supported by digital communication systems, the situation becomes more difficult because system vendors often develop their own parent portals, which are of course not integrated with other parent systems.

Finally, to improve teacher-parent communication some teachers are using free web-based tools that, while sometimes helpful, are simply yet another tool and account that parents need to maintain and may create data privacy concerns.

The following items describe the intent of this strategy:

- Promote and support greater and easier access to complete information for parents.
- Collaborate with the Redesigned Community Connectedness Program team to ensure focus on common goals.
- Design and implement a single-portal solution for parents, containing not only all the information parents should have access to regarding their students and schools, but also containing the tools necessary for parents to interact easily and efficiently with teachers, administrators, and the district in general.
- Acquire technology to greatly increase transparency, accuracy, and timeliness of information shared with parents.
- While supporting the distinct needs of each campus, provide a level of standard expectations regarding what is made available to parents.
- Include links to documents and actions that parents routinely need to take in support of their students (forms, applications, parent-teacher conference scheduling, communications with teachers, etc.).

*Goal:*

Parents of students at all Peoria schools can use a single secure portal to access all necessary data on their students, along with a robust and standard array of information and tools regarding enrollment, curriculum and instruction resources, local school calendar and activities, parental participation opportunities, and school safety.

*Supporting Projects:*

The two projects listed below follow a typical software acquisition and implementation sequence. Project 1 will result in a comprehensive needs determination. Project 2 will involve acquisition of the necessary tools and licenses and development of the portal.

1. *Parent Portal Requirements Determination.*  
**ON HOLD** | In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.
2. *Parent Portal Acquisition/Development and Integration.*  
**ON HOLD** | In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.

**Strategy 4 | Upgrade and replace the current staff portal.**

The current employee/staff portal has been in existence in essentially its current form for well over a decade. It has served its purpose, but has become outdated in design and structure and, more importantly, users find it increasingly difficult to use and to find needed information. The Microsoft SharePoint platform on which it is built is solid but is an older version of the latest SharePoint and lacks many important architecture, usability, and security features that are available in the newest versions. The most recent SharePoint version is not only fully cloud-based but also incorporates many new capabilities that are essential to our needs.

The work entails architecting a new design, both at the underlying foundation and data structure level, as well as at the user level. Subsequently, the rollout will require careful pilot testing and adjustments. Overall, it is feasible to project completion of the majority of the rollout by the end of FY 2023 with any remaining adjustments and final rollouts in FY 2024.

Following is a list describing some of the intended capabilities and features:

- Modernize and reorganize the existing “department-based” portal sites with new features from the new cloud-based SharePoint environment.
- Design and implement the concept of a role-based, targeted content portal that is designed to better serve the information and process needs of specific roles across the district. Maximize the individual configurability within the portal.
- In conjunction with the paper-reduction strategy (see Strategy #5), maximize implementation of process automation to eliminate – to the extent possible – recurring manual-based processes.

- Design and develop a set of school administration tools, accessible via school administration role targeted content, that will provide maximized support to school leadership.
- In conjunction with the Data Leadership and Management TD, develop or acquire and integrate the technical tools required to support enterprise content management and records management needs.

*Goal:* The goals for this strategy are the following:

1. By end of FY 2022 the foundation and data structures of the newly redesigned staff portal are complete.
2. By the end of the first semester, SY 2022-2023 the staff portal end-user pilots are successfully completed.
3. By end of FY 2024 the primary rollout of the new staff portal is successfully completed. Any necessary adjustments are completed by the end of FY 2025.

*Supporting Projects:*

1. *Staff Portal Architecture and Data Design.*  
ON HOLD | In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.
2. *Staff Portal Foundation implementation and pilots.*  
ON HOLD | In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.
3. *Staff Portal full implementation.*  
ON HOLD | In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.

**Strategy 5 | Eliminate paper as a primary medium for records management and operational processes.**

This project is closely aligned with the Data Leadership and Management TD, Strategy #3, Project #2. Peoria Unified currently maintains an enormous volume of paper-only records. Further, staff is accustomed to printing out copies of electronic records on a routine basis for filing, whether they are records of transactions (e.g., a purchase order) or documents that are already stored electronically (e.g., student transcripts). Such printed copies become outdated or incorrect very quickly and can realistically become a source of legal liability.

As records that are subject both to public records requests and to state statutes governing retention and destruction, such paper records represent a high level of risk regarding our ability to find and produce them when required. Moreover, paper records are always at risk from environmental damage or destruction.

Finally, many district processes are built around paper records, forms, and/or documents. Relying on paper for processing is inefficient and subject to lengthy and even costly disruptions when the paper is lost or misrouted.

Technology has existed for many years to eliminate paper records and processes, at least in cases where paper records and/or “wet” signatures are not legally required. Also, process automation technology is widely available that has the potential to save the district significant time and money and improve processing accuracy.

*Goals:*

1. In collaboration with the Data Leadership and Management TD, all existing paper records in the district (schools and departments) will be identified, catalogued, and aligned with statutory retention requirements. This is an enormously large task; the goal is to complete 25% of this work in FY 2022, 50% of the remaining in FY 2023, and the remainder in FY 2024.
2. In collaboration with the specific Data Leadership and Management project that will implement an Enterprise Content Management System (ECMS), as paper records are identified and catalogued (see goal #1 above), those that are not legally mandated to remain in paper form are scanned/digitized, appropriately stored and tagged with metadata and retention requirements.
3. 50% of the district’s identifiable paper-based processes are replaced with fully digital processes by the end of FY 2024. All remaining processes that do not require paper records are replaced with digital processes by the end of FY 2026.

### Supporting Projects:

1. *Paper records identification, inventory, and cataloguing.* It is impossible at this time to estimate the size and duration of this project since the amount and locations of all paper-based records is not fully known, but it is likely a multi-year effort. Some initial exploratory and survey-based work has already been accomplished. The project's objective is to conduct an initial physical examination to determine the *types* of paper records that exist in schools and administrative facilities. The purpose is to catalog the types and locations and to develop a first-order approximation as to the volume of records to be inventoried.  
**ON HOLD |** In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.
2. *Paper digitization and storage.* The objective of this project is to ultimately digitize all paper-based records that are not statutorily required to be maintained on paper with or without "wet" signatures, and to store the digitized records either in the appropriate district information system (e.g., Synergy or Visions) or in the newly implemented Enterprise Content Management Systems (ECMS – see Data Leadership and Management Strategy 3, Project #2). We recommend that a vendor specializing in such work be contracted to support or entirely take on this project.  
**ON HOLD |** In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.
3. *Paper-based process identification and digitization review.* This project is important to fully realize the goals of this strategy and specifically to improve efficiency, accuracy, and cost reduction. However, it is potentially a very large, multi-year endeavor that requires additional strategizing and planning. This objective at this time, therefore, is to conduct a thorough process survey to 1) determine which paper-based processes are the best candidates for digitization, and 2) to develop a plan for accomplishing that conversion to digital. As for Project #2 above, we recommend that this project be heavily supported with outside contracted services.  
**ON HOLD |** In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.

### Strategy 6 | Explore potential architecture and designs for IT infrastructure modernization.

While Peoria Unified has a very robust and highly secure IT infrastructure, both the rapidly rising levels of cybersecurity threats and the increasing need to support technology-rich and virtual/remote working and teaching and learning in an effective and secure manner require that the district consider significant modernization of that infrastructure. Many relevant technologies exist for this purpose, but it is a rapidly evolving and maturing area; specific architectural decisions should be researched but postponed for at least one-two years.

Given the level of digital connectedness with the Peoria Unified community and local jurisdictions, along with the high capital and operational cost of IT infrastructure, it makes sense that the district should explore potential partnerships with, at a minimum, the cities of Glendale and Peoria, and possibly Maricopa County. The intent of such partnerships would be to explore the potential for joint ownership or sharing of high-expense infrastructure (e.g., fiber cable, security operations centers, data centers, etc.).

### Goal:

The feasibility for sharing of IT Infrastructure and associated facilities with the cities of Peoria and Glendale and Maricopa County is determined and, if feasible, the sharing plan is developed.

### Supporting Projects:

1. *Future IT Infrastructure Modernization needs determination.* This project's objective is to engage with an outside IT infrastructure consulting entity to identify IT infrastructure areas in which the district's situation needs to be addressed over the next 3-5 years. This engagement will result in a report summarizing the opportunities, approaches to addressing them, and rough estimates of cost.  
**ON HOLD |** In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.
2. *Potential sharing opportunities with external jurisdictions.* This project's objective is to engage in discussions with the cities and county for the purpose of determining the potential for sharing of IT infrastructure costs and assets.  
**ON HOLD |** In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.

2. *Long-range IT infrastructure sharing plan development.* If the outcome of goal #1 is positive, develop a long-range IT infrastructure sharing/cooperation plan. The principles and overall goals of that plan should be complete by the end of FY 2023, with execution following.

**ON HOLD** | In the fall of 2022, this project was placed on hold due to budgetary and timing constraints.

## Strategic Reset Plan – Funding

### General Overview

The Strategic Reset Plan clearly represents a major investment in funds and other resources in support of the district's highest priorities. Further, the major initiatives described in the plan are currently not part of typical recurring capital and operations expenditures for normal school years. Finally, given the impact of the COVID-19 pandemic and the resulting highly compressed strategic planning cycle, Peoria Unified is faced with a substantial funding requirement for the Strategic Reset Plan.

While the plan itself contains several projects designed to increase efficiencies and to focus continued funding only on those programs that are delivering on expectations (see Comprehensive Funds/Budget Management, Strategies 2 and 3), it is likely not possible to reprogram and find the funding necessary in existing and projected annually recurring capital and operations budgets to fund the entire Strategic Reset Plan. However, several funding opportunities have recently occurred that have helped with associated requirements and that will play a major role in funding the plan going forward. They include the following:

- The first two allocations to Peoria Unified of Elementary and Secondary School Emergency Relief Fund (ESSER I and II).
- The district's solid position regarding carry-forward Maintenance and Operations balance.
- Full restoration of District Additional Assistance funds from the state.
- The ESSER III grant.

The first two ESSER allocations – ESSER I and II – while not specifically allocated to the Strategic Reset Plan, provided much needed funding support to the first two phases of the Arizona Department of Education's coronavirus Phases to Recovery plan. Those phases are 1) Relief and 2) Preparation and Prevention. The district's expenditure of ESSER I funds and (ongoing through September 2023) ESSER II funds on numerous items essential to Relief, Preparation, and Prevention is making substantial internal district funds available to help address Strategic Reset Plan requirements. ESSER I and ESSER II expenditures include the following:

- Relief – ESSER I: The district's allocation for ESSER I funds was \$4.2 million. That allocation has been fully expended on the following categories of items:
  - Cleaning and sanitation equipment
  - Technology and Computers
  - Online Curriculum Software
  - PPE
  - Refunds
  - Private School Equitable Services
  - Emergency Substitute Certifications
- Preparation and Prevention – ESSER II: The district's ESSER II allocation was \$17.4 million, of which \$6.25 million was expended through FY 2021 on the following items:
  - Technology and Computer Purchases
  - PPE
  - Air Purification Systems
  - Extended Summer Instruction
  - Distance Learning

The remaining ESSER II funds will be expended in support of various district initiatives through September 30, 2023.

The ESSER III grant is most closely aligned with the third ADE phase – Recovery. Careful analysis and planning by Peoria Unified staff and leadership has established an estimation that as much as 80% of the Strategic Reset Plan’s strategies and projects are eligible for ESSER III funding.

### Strategic Reset Plan | ESSER III Alignment

Peoria Unified’s approach to providing funding support to the Strategic Reset Plan for FY 2022-2024 is intentionally fully aligned with ESSER III funding requirements.

As described in the introductory section of this plan, the Superintendent and Cabinet began considering early in calendar year 2021 how the district would best approach post-pandemic challenges and lasting changes in PK-12 education, specifically as they will impact Peoria Unified. Our projections were that many or most of our students will have suffered a substantial learning disruption. Moreover, the sense of personal loss and in some cases mental/emotional trauma resulting from COVID-related restrictions (e.g., masks, social distancing, quarantining, inability to gather with their friends and family, etc.) is something that must be recognized and addressed.

Equally importantly, we recognized that while recovery – in all its forms and functions – is essential, recovery cannot simply mean returning to where we were as a district prior to the pandemic’s onset. Rather, we recognized that the nation, our local community, and indeed the challenges facing PK-12 education have permanently changed, requiring us to re-imagine the district as an institution fully prepared to meet the 21<sup>st</sup> Century challenges of this post-pandemic world.

As a result, the Superintendent and his leaders embarked in March of 2021 on development of this Strategic Reset Plan that addresses the needs to both recover and execute a major reset of the district’s vision and direction.

As details and requirements of the ESSER III grant emerged, district leadership conducted a comprehensive mapping of the strategies and projects defined within the new Strategic Reset Plan to ESSER III intent and eligibility requirements. One of the ESSER III requirements is that each district must develop and publish on its public website, by August 24, 2021, its ESSER III spending plan. Peoria Unified met that requirement with publication of its ESSER III Grant Reset and Recovery Plan. That plan is substantially aligned with the district’s Strategic Reset Plan, allowing us to clearly identify those components of the Strategic Reset Plan that are eligible for ESSER III funding support, as well as those that must be funded using other available sources.

### Funding Conclusion

District leadership has completed development of a draft three-year allocation of ESSER III funds to Strategic Reset Plan strategies. Allocation of those funds to specific projects in specific fiscal years is being addressed in conjunction with development of the Strategic Reset Plan Project Roadmap (see the Strategic Reset Plan – Plan Revision and Progress Monitoring section below). The result of that work – expected in late fall 2021 – will also identify those strategies and projects requiring funding support from other district sources, as identified above.

## Strategic Reset Plan – Plan Revision, Execution, and Progress Monitoring

The Peoria Unified School District Strategic Reset Plan for FY 2022-2024 is an evolving plan. Events, activities, potential Governing Board direction, changes in available funding, and other internal and external factors can and will affect the plan, requiring consideration for revisions. Ideally, revisions will be relatively small, such as changing the timelines for one or more projects, or modifying the scope and/or budget estimates for some projects. In some instances, responding to major changes in an external or internal context, such as a new statute that requires major funding changes to district programs or a significant strategic pivot directed by the Superintendent or Governing Board, may result in greater modifications.

An additional point regarding revisions to the plan is that the fiscal/school years addressed in the plan roll forward each year. The current plan years, sometimes referred to as the “plan horizon”, are FY 2022-2024. As FY 2022 progresses strategies and projects for FY 2025 will be added to the plan revision deliberations so that at the end of FY 2022 (at the time of budget approval) the plan horizon will have become FY 2023-2025.

The projects specified in this Strategic Reset Plan represent substantial expenditures of funds and other resources. As elements of Mission Priority and Transformation Driver strategies, those projects naturally have significant impact on the district and its schools, students, and families. Therefore, as each plan year approaches, the projects scheduled for that year must be verified and refined and made a part of the overall district’s annual budget and operating plan. Also, as each execution year progresses, it is vital that each project’s progress be monitored to ensure that it remains on schedule and within budget, and that its objectives are measured and met.

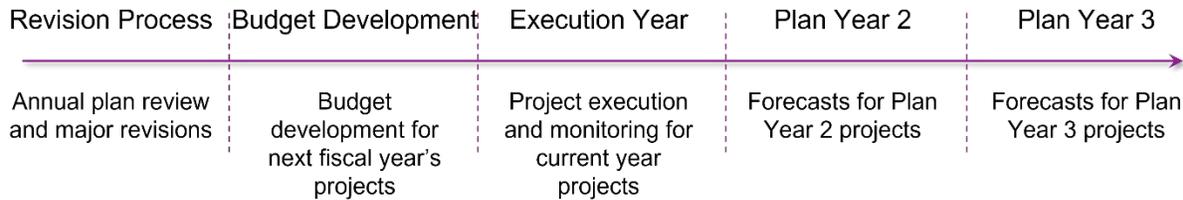
In general, then, the district must put in place a set of annually occurring and ongoing processes to 1) integrate the plan’s projects into the annual budget/operating plan work, 2) monitor external and internal dynamics to ensure that any necessary revisions to the plan are made each year, and 3) monitor execution of the projects to ensure that they are meeting their stated objectives, including timeline, budget, and outcomes. There are several actions the district will take in the coming weeks and months to address these requirements. The actions overlap in terms of timing and require coordination to ensure effectiveness. The Cabinet member with Strategic Plan responsibilities will carry out that coordination under the direction of the Superintendent.

- Adopt a Recurring Strategic Plan Revision and Execution Timeline and Vocabulary. To best be able to understand a discuss the stages of planning and execution and the years that are involved in those activities, the district will adopt the following framework and vocabulary:
  - *Plan Years, or Plan Horizon.* At any point in time the plan consists of three full fiscal/school years. Specifically, upon Governing Board adoption of the Strategic Plan in late spring of each year, the Plan Years (alternatively, the Plan Horizon) shall be the three years immediately following adoption.
  - *Revision Process.* Throughout each fiscal/school year there are numerous activities and events that produce data and information that may contribute to revisions to the Strategic Plan (see “Implement the annual Strategic Plan Revision Process” below). Revisions may be to individual projects or entire strategies. While minor revisions and adjustments may be made at any time, it is best practice to allow a full fiscal year to identify significant changes to the internal and external context/environment and to develop the strategies and potential projects to address those changes. The revision process for a given year, then, would wrap up in late summer or early fall and would be in solid shape for inclusion in the budget process commencing in late fall, essentially allowing about 14-15 months for the full revision process.
  - *Budget Development.* The budgets for individual projects scheduled for the following fiscal year are refined and considered within the district’s regular annual budget development process. Also, final evaluation of outcomes from the previous year’s projects should take place to determine whether ongoing projects should receive continuing funding support, as well as considering those outcomes to

determine whether sequential or time-dependent projects for next year should be revised or eliminated.

- *Execution Year.* This is the year during which approved and budgeted projects are being executed – in other words, the “current” fiscal/school year. Some projects may run longer than one year, in which case their duration spans multiple execution years. Ongoing project monitoring occurs during this year – see the monitoring processes below.
- *Plan (or Forecast) Years.* These are typically years two and three of the currently executing Strategic Reset Plan, otherwise known as the “out years”.

### Strategic Reset Plan Revision and Execution Timeline



The graphic above illustrates the general sequence for plan revision, budget development, project execution and out-year planning/forecasting for the typical three-year Strategic Plan time horizon. Since our current Strategic Reset Plan (FY 2022-2024) is being adopted for the first time and Year 1 projects will begin execution this fiscal year, the budget development activities will follow a more compressed schedule in the short term. Specifically, budget development for this year’s projects is already well underway and budgets for FY 2023 projects will be considered as part of the district’s FY 2023 budget development process. Also, plan revision for FY 2023 projects and beyond will take place during the second half of this fiscal year – FY 2022.

- Develop and maintain the Strategic Reset Plan Project Roadmap. This companion document will identify each project currently defined within the plan, its scheduled start and stop dates, initial budget estimate and resource requirements, and inter-project dependencies (e.g., which projects depend on others, either due to outcomes or timelines). The roadmap will be kept current as projects complete, are modified or eliminated, and are added as part of the Strategic Reset Plan revision process.
- Establish the Superintendent’s Strategic Plan Oversight Team (SPOT). This group will be made up of director and principal-level staff, each of whom is involved – by nature of his/her job position – with strategic plan work. One of the members will be identified as the SPOT Chairperson. The SPOT will have two primary functions:
  - Ensure that every Strategic Reset Plan project, before its execution begins, is properly defined within the Project Roadmap, identifies clear start and estimated stop dates, has necessary budget authority, *identifies specific success metrics*, and has an assigned project manager and team.
  - Through recurring meetings and other activities, monitor each executing project to ensure that it is meeting its objectives – including timeline, budget, and outcomes – and that obstacles requiring additional assistance are escalated to the appropriate leader for resolution.
- Implement the annual Strategic Plan Revision Process. While variations in the execution of projects during any given fiscal year can and will contribute to Strategic Reset Plan revision, the most significant revisions will come as a result of a continuous process by which the internal and external context/environment is assessed, stakeholder input is obtained, and academic and operational outcomes are evaluated. Further, the nature of strategic planning is such that the evaluation of inputs and other factors that contribute to plan revisions must happen well before beginning the annual budget process for the year in which the revisions will be implemented.

The following are the primary recurring activities or events that provide vital plan revision information and illustrate why this 14-15-month revision cycle is done well ahead of the execution year.

- Receipt and evaluation of AZM2 proficiency and growth scores – June and August
  - Parent Engagement – Begins September/October
  - Program Evaluations – Fall and early Winter
  - Superintendent Goal Development
  - Bond and Override Elections (in certain years) – November
  - Annual Climate Survey – February
  - Superintendent Goal Evaluation
  - State Regular Legislative Session – Jan-May/June (typically)
- Establish recurring meetings for Superintendent and Cabinet-level comprehensive Strategic Reset Plan Reviews. These reviews should be scheduled at four to six-week intervals throughout each fiscal year. At each of these meetings, the SPOT Chairperson and selected members will provide a detailed review of the Strategic Reset Plan status. The intent of the reviews is to identify projects that are experiencing difficulties and may need assistance getting on track, and to review outcomes to ensure that the strategic intentions of the plan’s Mission Priorities, Transformation Drivers, and overall plan goals are being met. As part of this process, the Superintendent will work with the Governing Board President and Clerk to schedule Board updates on an as-desired basis during the year.
  - Integrate the Strategic Reset Plan Project Roadmap, project monitoring, and plan revision with the annual budget development process. The district’s budget/annual operating plan development process typically begins late in the first semester. At that time, based on current project progress, planned revisions to the Strategic Reset Plan, and most importantly the Project Roadmap, updated budget estimates for the projects planned for the next fiscal year will be submitted by Cabinet leaders to the CFO and Budget Team for evaluation and integration into the budget process. As budget development progresses into second semester, and as revenue projections from the state and all other sources begin to solidify, Cabinet leaders and teams will continue to refine the project forecast and budget estimates so that when the budget is finalized for Governing Board approval, the Strategic Reset Plan projects that are approved by the Superintendent will have the benefit of defined and allocated budgets.
  - Conduct periodic Governing Board updates and request annual Strategic Reset Plan Governing Board approval. The Superintendent will work with the Governing Board to determine the frequency and schedule for in-progress updates/reviews. Moreover, as a critical part of the district’s annual budget development work, the annually reviewed and revised (as appropriate) Strategic Reset Plan will be taken to the Governing Board for adoption at the same meeting at which the Board approves the district budget.

## Conclusion

The Peoria Unified School District FY 2022-2024 Strategic Reset Plan is the result of tremendous collaborative work by district leadership and staff, along with substantial input from many additional staff, parents, and other key internal and external stakeholder groups.

The plan reflects the Superintendent’s vision for Peoria Unified regaining the seat “at the head of the table for state and national PK-12 education”. Its overall goal and purpose is to put the district on a new trajectory of excellence by implementing a series of strategies for re-imagining our most important mission-related programs. The Mission Priorities are an expression of intent for the most important aspects of the district’s mission. The accompanying Transformation Drivers not only support those priority programs but also add the transformative nature of the plan required to drive the jump to that new, re-imagined trajectory.

Like all strategic plans, the Strategic Reset Plan is and will remain an evolving work in progress. We fully expect and plan for revisions to the strategies and projects over time. At the same time, district leadership will ensure that the projects identified in the plan and ultimately selected for execution shall be carefully and rigorously monitored to ensure that quality, budget, and timeline expectations are met. To that end, a comprehensive set of processes for plan revision, execution, and progress monitoring has been designed and shall be implemented as the Rebuild Phase of the plan commences.

Funding the plan is clearly a major factor in its success. District leadership and staff have worked hard and diligently to align the plan’s budget and resource requirements with the third allocation of Federally funded Elementary and Secondary School Emergency Relief Fund (ESSER III), to the extent that upwards of 75-80% of the plan’s requirements are eligible for ESSER III funding. The remaining parts of the plan not eligible for ESSER III will be funded through internal district capital, Maintenance and Operations, and appropriate grant funds.

Finally, the plan represents not only a series of actions to transform the district to a new and better state, but also implements a strategic planning process that will keep Peoria Unified on a solid trajectory of excellence for years into the future.

## Appendix – Strategy and Project Listing and Status

### Mission Priorities

#### Re-Imagined Teaching and Learning Program

Strategy 1 | Re-imagine teaching and learning by establishing expectations and implementing best practices for blended in-person and virtual learning, K-12.

1. **COMPLETED** | Virtual school for school choice for students in grades K-12 beginning the 2021- 2022 school year.
2. **IN PROGRESS** | Classroom expectations and responsibilities for grade level bands and professional development in the integration of district-adopted resources including technological tools and strategies.
3. Site Support Task Force Implementation.
4. **IN PROGRESS** | Robust summer programming to address specific learning loss.
5. **IN PROGRESS** | Establishment of Mutual accountability for effective implementation of Professional Learning Communities (PLCs) and a Multi-Tiered System of Supports (MTSS) to increase student achievement.

Strategy 2 | Research, design, and implement curriculum, academic programs, and district facilities to increase student engagement and rigor and modernize the student experience.

1. **IN PROGRESS** | Increased rigor at the high school Levels through increased participation in Advanced Placement (AP) courses and AP test proficiency.
2. Best-practice research and programming for core and elective programming for grades 6-8 to modernize student experiences, expand choices, and consider middle school models, (K-5 and Pre-K) and facilities for the future.
3. **IN PROGRESS** | Acquisition of research based curricular resources.
4. **COMPLETED** | Use of national standards (Cognia™) to assess needs and identify areas for growth as a school system by participating in the district accreditation process.

#### Safe and Welcoming Schools

Strategy 1 | Develop and implement a formal Safety and Emergency Management program.

1. **COMPLETED** | Formal Safety and Emergency Response Program.
2. **ON HOLD** | Surveillance Cameras at Elementary Schools.
3. **IN PROGRESS** | CPTED (Crime Prevention & Safety) Assessments and Mitigation Projects.
4. **IN PROGRESS** | Integrated Safety, Security, and Energy Management.

Strategy 2 | Develop and implement a “Quality Customer Service” program by which school administrators and staff develop skills that make our families and other school visitors feel welcome and that their needs are addressed.

1. **IN PROGRESS** | Customer Service Standards Definition and Training.
2. Annual Customer Service Evaluation and Response.

Strategy 3 | Devise and implement a “Campus Appeal” program that defines standards for school appearance and makes appropriate improvements to create and sustain a physical sense of welcome at each school.

1. **IN PROGRESS** | Campus Appeal Standards and Measures Definition.
2. Campus Appeal Implementation.
3. Annual Campus Appeal Assessment.

#### Facilities Master Planning Program

Strategy 1 | Develop a long-term Teaching and Learning Facilities Master Plan in alignment with Re-Imagined Teaching and Learning.

1. **SUSPENDED** | School Facilities Repurposing Plan.
2. **IN PROGRESS** | K-5, 6-8 Schools Consideration.
3. School Facilities Repurposing Implementation.

Strategy 2 | Design and implement an ongoing Facilities Master Planning Program.

1. Facilities Master Planning Program Design and Implementation.
2. Facility Condition and Operation index Design and Implementation.
3. Student Accommodation Planning.

Strategy 3 | Explore partnerships with external entities for the purpose of considering adaptation and/or development of shared facilities.

1. **ON HOLD** | Potential Shared Facilities Partnership Development.

Strategy 4 | Design and implement a Data Analytics system to fully support the Facilities Master Planning Program.

1. Data Analytics Needs Determination.
2. Data Analytics System Acquisition and Implementation.

### Redesigned Community Connectedness Program

Strategy 1 | Improve internal and external communication through modern systems and tools.

1. **COMPLETED** | Parent communications tools evaluation and acquisition.
2. **ON HOLD** | Digital Customer Relationship Management (CRM) Implementation.

Strategy 2 | Expand connections with key stakeholder groups.

1. **IN PROGRESS** | Annual Communications Plan for the 70% of community without school-age children.
2. **COMPLETED** | Development and Launch of the Business Advisory Council.
3. **IN PROGRESS** | Develop internal communications plan to support district initiatives
4. **ON HOLD** | Formal business partnership and advertising program implementation.
5. **ON HOLD** | Opportunities for district leadership to serve in advisory capacities for external not-for-profit entities.

Strategy 3 | Implement a system to effectively market schools and programs.

1. **IN PROGRESS** | District-wide Strategic Marketing & Communications Plan Development.

### Comprehensive Funds/Resource Management

Strategy 1 | Design and implement a long-range funding plan and process for Teaching and Learning, Facilities Master Planning, and other Mission Priorities and Transformation Drivers.

1. **COMPLETED** | FY 2022 Strategic Reset Plan Funding Requirements.
2. **IN PROGRESS** | FY 2023 Strategic Plan Funding Requirements.
3. **IN PROGRESS** | Annual Strategic Plan Revision and Budget Development.

Strategy 2 | Design and implement a formal Program Management and Evaluation Process.

1. Program Definition Implementation.
2. **IN PROGRESS** | Program Management and Evaluation Implementation.
3. **ON HOLD** | Program Indicator Management.

Strategy 3 | Implement a hybrid budget development process to replace the current incremental process.

1. **IN PROGRESS** | Hybrid Budget Development Process Design.
2. Hybrid Budget Process Implementation.

Strategy 4 | Acquire and implement modern data analytics and budget management tools to fully support district-level budget and finance needs as well as budget management needs of departments and site administrators.

1. **IN PROGRESS** | Requirements definition for a data analytics system.
2. Development or acquisition of budget management tools.
3. Implementation of Data Analytics system and required training and support.

Strategy 5 | Develop strategies and projects for funding and financially sustaining a modernized and competitive compensation model.

1. Compensation realignment with job descriptions based on the ongoing compensation study.
2. Comprehensive review of stipends and supplemental pay.
3. **IN PROGRESS** | Support for competitive compensation across the organization that considers minimum wage increases.

## Transformation Drivers

### Leadership and Organizational Development

Strategy 1 | Design and implement a process to strengthen, sustain, and evolve the district's leadership and accountability culture.

1. **IN PROGRESS** | PLC Process implementation for administration/leadership development.
2. Professional development plan for facilitated/shared leadership.

Strategy 2 | Define and implement structures and programs for employee development and growth for all employee groups.

1. **IN PROGRESS** | District Leadership Development Academy (Aspiring Administrator Academy).
2. **ON HOLD** | Employee Resource Groups.

### Workforce Modernization and Sustainability

Strategy 1 | Develop and Implement a clear, consistent, and modernized organization, classification, and competitive compensation structure.

1. Modernized Organization Research and Definition.
2. Salary Schedules and Leveling Updates.

Strategy 2 | Re-imagine the district's recruiting and hiring practices.

1. Review of Applicant Tracking Systems (ATS).
2. Professional Development.

Strategy 3 | Maximize the benefits and usability of the Performance Evaluation System.

1. Staff Performance Review.
2. Performance Systems Review.

Strategy 4 | Develop, implement, and communicate a modern plan for supporting flexible workspace and remote connection.

1. Staff Telecommuting.
2. Revised Telecommuting Agreement Implementation.

### Data Leadership and Management

Strategy 1 | Develop and sustain a positive and proactive, districtwide Data Leadership Culture.

1. **ON HOLD** | Data Leadership Culture Assessment.
2. Data Literacy professional development.
3. **ON HOLD** | Data Access review and revisions.
4. **ON HOLD** | Data Quality practices implementation.
5. **ON HOLD** | Data Definition standards and practices implementation.

Strategy 2 | Implement Data Analytics tools/solutions in support of Strategic Reset Plan Mission Priorities and Transformation Drivers.

1. **IN PROGRESS** | Data Analytics research, and needs determination.
2. **IN PROGRESS** | Data Analytics Acquisition Plan.
3. Implementation of Data Analytics solution(s).

Strategy 3 | Implement a Data Lifecycle Management Program.

1. **ON HOLD** | Data Inventory, Cataloging, and Classification.
2. **ON HOLD** | Enterprise Data and Content Management System and Protocols.
3. Data Communications and Transfer Protocols.
4. **ON HOLD** | Data/Records Management Program Implementation, Phase II.
5. **IN PROGRESS** | Public Records Request Search, Analysis, Redaction, and Reporting Software Acquisition.

Strategy 4 | Implement a Data Leadership and Oversight Program and Council (DLOC).

1. **ON HOLD** | DLOC Implementation and Charter.
2. Data Leadership and Oversight Key Process Indicator (KPI) Implementation.

Strategy 5 | Establish a Data Leadership and Management organizational structure and base capacity.

1. **ON HOLD** | Data Leadership and Management Department Implementation.

## IT Modernization

Strategy 1 | Implement an integrated digital teaching and learning (T&L) platform.

1. Integrated T&L Platform Needs Determination.
2. Integrated T&L Platform Acquisition and Implementation Schedule.
3. Integrated T&L Platform Acquisition and Rollout Projects.

Strategy 2 | Implement an integrated site safety, security, and energy management system.

1. **IN PROGRESS** | Network Segmentation to Support Surveillance, Security, and Energy Management.
2. **ON HOLD** | Upgrade/Replace Digital Door Locking Systems.
3. **ON HOLD** | Surveillance, Security, and Energy Management Monitoring and Reporting System Implementation.
4. **IN PROGRESS** | Advanced Threat Detection System Implementation.

Strategy 3 | Devise and implement an integrated parent portal.

1. **ON HOLD** | Parent Portal Requirements Determination.
2. **ON HOLD** | Parent Portal Acquisition/Development and Integration.

Strategy 4 | Upgrade and replace the current staff portal.

1. **ON HOLD** | Staff Portal Architecture and Data Design.
2. **ON HOLD** | Staff Portal Foundation implementation and pilots.
3. **ON HOLD** | Staff Portal full implementation.

Strategy 5 | Eliminate paper as a primary medium for records management and operational processes.

1. **ON HOLD** | Paper records identification, inventory, and cataloging.
2. **ON HOLD** | Paper digitization and storage.
3. **ON HOLD** | Paper-based process identification and digitization review.

Strategy 6 | Explore potential architecture and designs for IT infrastructure modernization.

1. **ON HOLD** | Future IT Infrastructure Modernization needs determination.
2. **ON HOLD** | Potential sharing opportunities with external jurisdictions.
3. **ON HOLD** | Long-range IT infrastructure sharing plan development.