



Shorewood
SCHOOL DISTRICT

**Operational Expectations Monitoring Document
OE-1 Global Operational Expectation**

Certification of the Superintendent: *With respect to Operational Expectation 1 (Global Operational Expectation), taken as a whole, the superintendent certifies that the proceeding information is accurate and complete, and is:*

- In Compliance**
- In Compliance with Noted Exceptions**
- Not in Compliance**

Signed: Laurie Burgos, Superintendent **Date:** January 9, 2024

Executive Summary

This OE 1 Monitoring Document reflects compliance with Board indicators during the 2022-2023 school year. With a transition to new District leadership in mind, Interim Superintendent, JoAnn Sternke, and the District leadership team also identified these system-wide functions and needs as priorities for 2022-2023:

- Communications about budget development and short- and long-term financial stewardship priorities;
- Human resources tools, including updating policy references in staff handbooks; and
- Department and school leadership development and team building.

A coordinated, state-wide legislative advocacy effort was not successful in securing adequate funding for public education through the state budget process, making careful stewardship of all of our resources, and community support, imperative in the face of continuing financial challenges:

- With the completion of renovations to Shorewood Intermediate School, the District concluded the vast majority of capital referendum work, on time and on budget, in September 2022;
- Passage of a five-year Operating Referendum in April 2023 reduced the District's 2023-2024 budget gap by approximately \$1.7 million and averted the need for deep reductions in student programs, staff and services; and
- The District created a long-term capital maintenance strategy to help finance the substantial cost of operating our historic school buildings.

Responsive Human Resources functions and progress toward strategic priorities are also key to maintaining and strengthening our organization's condition:

- Revisions were made to the Teacher Appendix of the Employee Handbook, in consultation with the SEA;
- Medical benefit plan changes implemented during the year reduced the impact of rising premiums and medical care costs on both employees and the District; and
- The District continued to invest in professional development for teachers and support staff, and preserved teachers' collaborative work time and planning periods.

Administrators and school leaders continued to expand systems-level initiatives to support student growth and achievement:

- Adoption of Educator Effectiveness evaluations following a pandemic-related pause in 2021;

- Continued improvement in addressing disproportionality among students referred for special education services, per DPI and state statutes;
- Policies and procedures that support safe use of District technology and promote digital citizenship; and
- Expanded safety and Title IX training for school staff, as well as training on identity-relevant teaching and other professional practices that support our ongoing equity work.

Equitable resource allocation, a rigorous continuous improvement cycle and direct and meaningful engagement with students, staff and residents are key building blocks for 2023-2024. These initiatives will be central to strategic planning that will build on Vision 2025, and this critical community dialogue will be a focus over the next year.

Disposition of the Board: *With respect to Operational Expectation 1 (Global Operational Expectation), the Board:*

- Accepts the report as fully compliant
- Accepts the report as compliant with noted exceptions
- Finds the report to be noncompliant

Summary statement/motion of the Board:

The board finds that OE-1 is compliant with noted exceptions.

Though we did not achieve the goal of 70% expressed support for the direction of the district, we have seen notable improvements compared to the previous year:

Of the respondents who expressed an opinion on whether the district was heading in the right direction, in 2023, 68.5% agreed or strongly agreed whereas in 2022 65.1% agreed or strongly agreed.

Additionally, in 2023, 13.6% of respondents strongly agreed that the district is heading in the right direction whereas in 2022, 9.9% strongly agreed.

Signed: Emily Berry, Board President Date: January 9, 2024

OE-1: Global Operational Expectations -

The Superintendent shall not cause, allow, or fail to take reasonable measures to prevent any practice, activity, decision or organizational condition that is unlawful, unethical, unsafe, disrespectful, imprudent, in violation of Board policy or endangers the District's public image or credibility.

Superintendent Interpretation:

- This OE holds the Superintendent accountable for following Board policy, State and Federal law along with upholding the values of Village of Shorewood. This OE is broad in its scope and generally holds the Superintendent responsible for ensuring that the District operates in a legal, safe, and ethical manner.
 - **Unlawful** shall mean in violation of federal, state, and local laws.
 - **Unethical** shall mean behavior that is improper or does not conform to accepted professional standards of conduct.
 - **Unsafe** shall mean in a manner that is likely to physically injure students, employees, or visitors to the District.
 - **Disrespectful** shall mean in a manner that is not reasonably considering the situation or feelings of the person to whom one is speaking.
 - **Imprudent** shall mean reckless or irresponsible actions.
- This OE requires the Superintendent to take "**reasonable measures**," which shall mean that the Superintendent shall take steps to follow Board policy or protect the District's public image in a manner similar to what other superintendents or leaders of organizations might take under similar circumstances.
- This OE requires the Superintendent to protect the legal position of the District as well as the ethical standing of the District. The Superintendent is charged with protecting the "**organizational condition**," which shall mean the legal standing of the District and the perception that stakeholders have of the District with regard to trust and respect.
- This OE requires the Superintendent to establish and maintain a respected and positive "**public image**," which shall mean the positive perception held by the overwhelming majority of the stakeholders in the District. Stakeholders are defined as all guardians of Shorewood students and all the people who live in the Village of Shorewood.

OE-1 The Superintendent shall not cause, allow, or fail to take reasonable measures to prevent any practice, activity, decision or organizational condition that is unlawful, unethical, unsafe, disrespectful, imprudent, in violation of Board policy or endangers the district's public image or credibility.	<u>Superintendent</u>	<u>Board</u>
	Compliant	Compliant
	Compliant with Exceptions	Compliant with Exceptions
	Not Compliant	Not Compliant

Superintendent Interpretation

Board Indicator 1: <i>We will know we are compliant when:</i> <ul style="list-style-type: none"> The Board, upon evaluation of the OE policies, finds no significant violation of or not in compliance with any of the policies. 	<u>Superintendent</u>	<u>Board</u>
	Compliant	Compliant
	Not Compliant	Not Compliant
Evidence: There were no significant violations of Board policy during the past year, and efforts were made to review and revise OE indicators to clarify expectations and outcomes measurements.		

Board Indicator 2: <i>We will know we are compliant when:</i> <ul style="list-style-type: none"> The District is not found to be in violation of any law when any legal action is taken against the District. 	<u>Superintendent</u>	<u>Board</u>
	Compliant	Compliant
	Not Compliant	Not Compliant
Evidence: The District was not in violation of any law when any legal action was taken against the District.		

Board Indicator 3: <i>We will know we are compliant when:</i> <ul style="list-style-type: none"> In a random survey sample of District stakeholders, at least 70% of the respondents express support for the direction of the District. 	<u>Superintendent</u>	<u>Board</u>
	Compliant	Compliant
	Not Compliant	Not Compliant

2023 School Perceptions Parent & Community Member Survey Results (total n=698)

The District is heading in the right direction. (n=559)

Strongly agree (5)	76	13.6%	
Agree (4)	222	39.7%	
Disagree (2)	83	14.8%	
Strongly disagree (1)	54	9.7%	
Don't know/doesn't apply (0)	124	22.2%	

AVG: 3.42 SD: 1.31

2023 Community Members Only (defined as not having school-age children)

The District is heading in the right direction. (n=87)

Strongly agree (5)	12	13.8%	
Agree (4)	24	27.6%	
Disagree (2)	16	18.4%	
Strongly disagree (1)	10	11.5%	
Don't know/doesn't apply (0)	25	28.7%	

AVG: 3.19 SD: 1.44

Comparison: 2022 School Perceptions Parent & Community Member Survey Results (total n=655)

The District is heading in the right direction. (n=537)

Strongly agree (5)	53	(9.9%)	
Agree (4)	222	(41.3%)	
Disagree (2)	88	(16.4%)	
Strongly disagree (1)	59	(11%)	
Don't know/doesn't apply (0)	115	(21.4%)	

AVG: 3.29 SD: 1.31

2022 Community Members Only (defined as not having school-age children)

The District is heading in the right direction. (n=81)

Strongly agree (5)	5	6.2%	
Agree (4)	28	34.6%	
Disagree (2)	15	18.5%	
Strongly disagree (1)	9	11.1%	
Don't know/doesn't apply (0)	24	29.6%	

AVG: 3.09 SD: 1.33

Responses to this question in the 2023 School Perceptions survey are illustrated above, with 53.3% of all question respondents strongly agreeing or agreeing with the statement. Though survey populations vary each year, this continues an upward trend from a low of 44% in 2021, but does not meet the compliance indicator. Other data notes:

- Prior years' Parent and Community Member data for this question: 2020 (n=666) 63.8% and 2019 (n=338) 53.8%
- Disaggregated community member responses to the question from the two most recent surveys are included to illustrate the makeup of the recent survey populations; and
- Parents only (n=443) who responded "don't know/doesn't apply" to the survey question was 20% in 2023.

Board Comments: