



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 14, 2025

Revised January 28, 2025

Executive Summary

Operational Expectation 1 (OE 1) Global Operational Expectation has been monitored and reviewed to ensure that the District is in compliance with state law, Board expectations and District policy.

Summary of Compliance

This Operational Expectations Monitoring Document is defined by the following Board Policy and 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.

- **1.1** - The Board, upon evaluation of the OE policies, finds no significant violation of or not in compliance with any of the policies;
- **1.2** - The District is not found to be in violation of any law when any legal action is taken against the District; and
- **1.3** - In a random survey sample of District stakeholders, at least 70% of the respondents express support for the direction of the District.

For this reporting period, the District is in full compliance with two of the three measures: 1.1 and 1.2. Board and District policies are in place and followed. No legal action was taken against the District during the 2023-24 school year.

Recommendations for OE 1

As we continue to work together to ensure that compliance indicators in each Monitoring Document accurately reflect Board Policy, the District presents the following recommendations for modifications to the OE 1 report:

- Limiting all evidence to the report year only to determine compliance, consistent with other OE Monitoring Document changes; and

- Eliminating indicator 1.3, which addresses community support for the District. This is not a measure of compliance with OE 1 Policy. Questions similar to the School Perceptions Survey question in 1.3 are also included in OE 7 (Communicating with Village Residents and Public Audiences).

Areas for Continuous Improvement

While the District recommends limiting the OE 1 Report to Policy compliance, we recognize it is critical to invite and understand community perceptions of the District, and to address any areas of concern. Changes made to other OE reports that transition away from single-question satisfaction measures to a more holistic framework that monitors satisfaction through multiple measures will support this.

In addition to increasing and leveraging feedback received through focus groups, community engagement events and other communications tools, we note the following opportunities for continuous improvement specifically related to OE 1:

- Prioritize consistency in the management of human resources functions, budgets and financial resources and school administration to ensure transparency, the timely delivery of important information and equity for all students and staff;
- Continue the implementation of both annual and long-term strategic initiatives that address best practices and legal and policy compliance across schools and administrative departments; and
- Continue to provide the community with regular updates, including messaging about the District vision, priorities, progress, challenges, and changes. There will be many opportunities for this with the launching of a new Strategic Plan in 2025.

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:

Signed: Emily Berry, Board President **Date:** January 28, 2025

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. <p><i>In a random survey sample of District stakeholders, at least 70% of the respondents - not including those who responded Don't Know/Doesn't Apply - express support for the direction of the District.</i></p>	<u>Superintendent</u>	<u>Board</u>
	Compliant	Compliant
	Not Compliant	Not Compliant

Evidence: *2024 School Perceptions Parent and Community Member Survey Results

Percentage of Parents and Community Members (n=434) who expressed support for the direction of the District (strongly agree or agree): 61.2%

Percentage of Community Members Only (n=47) who expressed support for the direction of the District (strongly agree or agree): 46.8%

Board Comments:

***For Reference Only**

Historical School Perceptions Data Provided in OE 1.3

2024 School Perceptions Parent & Community Member Survey Results (total n=513)

The District is heading in the right direction. (n=513)			
Strongly agree (5)	66	12.9%	<div></div>
Agree (4)	200	39%	<div></div>
Disagree (2)	117	22.8%	<div></div>
Strongly disagree (1)	51	9.9%	<div></div>
Don't know/doesn't apply (0)	79	15.4%	<div></div>
AVG: 3.26 SD: 1.32			

2024 Community Members Only (defined as not having school-age children)

The District is heading in the right direction. (n=63)			
Strongly agree (5)	7	11.1%	<div></div>
Agree (4)	15	23.8%	<div></div>
Disagree (2)	16	25.4%	<div></div>
Strongly disagree (1)	9	14.3%	<div></div>
Don't know/doesn't apply (0)	16	25.4%	<div></div>
AVG: 2.89 SD: 1.43			

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%	<div></div>
Agree (4)	222	39.7%	<div></div>
Disagree (2)	83	14.8%	<div></div>
Strongly disagree (1)	54	9.7%	<div></div>
Don't know/doesn't apply (0)	124	22.2%	<div></div>
AVG: 3.42 SD: 1.31			

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

