



EVANSTON/SKOKIE
SCHOOL DISTRICT 65

Every Child, Every Day, Whatever it Takes

TO: Board Of Education

CC: Dr. Angel Turner & Dr. LaTarsha Green

FROM: Dr. Katie Speth

DATE: November 1, 2024

RE: 3,6,9 memo regarding IL Department Strategic Goals

Objective: X Information Discussion Follow-up
Decision

SMARTIE Goal - Evaluation

100% of certified educators in D65 will receive a complete evaluation process by May 1st 2025.

100% of school leaders will receive a complete evaluation process by June 16, 2025

- The Schools Management team updated the two performance evaluation systems, TalentED (educators) & SuperEval (leaders and district personnel) to update the rubrics, cycles and processes to ensure that the system could support the 2024/2025 performance evaluations
- An audit of school and district leader evaluation certifications was completed to ensure that all leaders had up to date certifications by October 1st.
- Evaluation cycle information was shared with school and district leaders to gain feedback on the assigned educator evaluation cycles.
- Professional learning focused on evaluation systems include
 - Calibration sessions for school leaders during the Leadership Collaboratives:
 - 9/12/24 Collaborative: Evaluation Calibration Domain 3C
 - 12/12/24 Collaborative: Evaluation Calibration Domain 2 (Rescheduled from 10/24/24 collaborative)
 - Small group tutorials on:
 - SuperEval
 - School leader evaluations
 - Developing SLOs (student learning objectives)
 - Perform (Talent Ed) Tutorial

SMARTIE Goal - Standards Based Grading

By June 2025, District 65 will implement a comprehensive, equitable, and inclusive standards-based learning and grading (SBL/G) system across all K-8 schools, with 100% of educators demonstrating proficiency in consistent assessment practices.

- Worked with the Performance Management and Accountability department to align PowerSchool to support standards based grading. This included ongoing alignment adjustments based on feedback from educators and school leaders.
- Communications efforts
 - Collaborated with communications team on the development of the district website which includes video tutorials on PowerSchool and student friendly videos about standards based grading

- A standards based grading pulse check survey was sent to 6th, 7th and 8th grade parents on September 5th with a follow up parent focus group session on October 29th, *(rescheduled from earlier in October)*
- Professional learning focused on middle grades teachers as this was a new rollout for 6th, 7th and 8th grade teachers PD for middle grades teachers
 - Content directors and facilitators lead professional learning sessions aligned to standards based grading during the 9/18/24 PD
 - Content leaders and directors provide ongoing coaching and support through PLCs
- Support for school leaders
 - Content directors and facilitators lead standards based grading information sessions during September 12th Leadership Collaborative
 - Schools management and Performance Management and Accountability hosted Zoom support sessions at progress report time

SMARTIE Goal - Instructional Framework

In 80% of the observed classrooms two identified instructional elements from the D65 Instructional Framework are readily apparent

- Instructional Leadership Department developed D65 Instructional Framework based on Leading Educators Teaching for Equity Framework
- Instructional Leadership Department began socializing the framework with stakeholders
 - Principals and instructional coaches during leadership collaborative
- Utilizing Strategic Walk through goals to identify 1-2 high impact instructional strategies that could be a focus for future instructional coaching and professional learning
- Next steps include
 - Collaboration with Student Specialized Services and Supports with a focus on ensuring that the D65 Instructional Framework supports multilingual, dual language and special education students.



EVANSTON/SKOKIE
SCHOOL DISTRICT 65

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TO: District 65 School Board

CC: Dr. Angel Turner, Superintendent

FROM: Dr. Corina Herrera, Assistant Superintendent of Student Specialized Services

DATE: November 4, 2024

RE: 3-6-9 Update

Objective: ☒ **Information** ☐ **Discussion** ☐ **Follow-up** ☐
Decision

This memo provides a quarterly update on the Student Specialized Services and Supports (S4) department goals and work related to the School Deficit Reduction Framework.

Student Specialized Services and Supports Goals Progress to Date

The Student Specialized Services and Supports Department (S4) has been working toward the following three goals that align to the district and superintendent priorities:

Focus Area 1: 6th grade Dual Language

Strategic Goal 1: Equity, Access, and Opportunity

Goal: By June 2025, all 6th-grade Dual Language (DL) students in District 65 will have equitable access to services and supports, including Multi-Tiered System of Supports (MTSS), language allocation instruction (ML Services), Individualized Education Services (IES), Health Services, and Wellness Services. This will be verified through quarterly tracking and documentation.

Progress: Our primary goal is to ensure 6th-grade DL students have access to the same services as their peers. This interdepartmental and intradepartmental collaboration has fostered monthly meetings across S4 teams, building departmental capacity and knowledge sharing. Key developments include:

The ML team created a language allocation walkthrough checklist.

The MTSS team is aligning interventions to support English Learner (EL) needs, ensuring students with IES plans receive MTSS interventions even in areas of unidentified special education needs.

The ML team drafted the initial Dual Language Middle School Implementation plan and holds monthly committee meetings for plan review and feedback.

Challenges: Staffing shortages at Bessie Rhodes have impacted the provision of Occupational Therapy Services and Bilingual Specialized Instruction. Disruptions in services are being documented, with compensatory services planned as needed. Spanish-speaking paraprofessionals are providing native language support for the bilingual IES teacher vacancy, with IES support provided by a monolingual teacher, leaving bilingual students without specialized Spanish instruction.

Focus Area 2: Budget

Strategic Goal 5: Strategic Resource allocation practices that ensure long-term financial stability and the allocation of resources aligned to equity priorities

Goal: By the end of the 2024-2025 school year (SY25), each team within the Student Specialized and Support Services (S4) Department will manage their allotted budget without exceeding the total annual budget provided by the Business Office. This will be achieved through monthly, quarterly, and annual budget monitoring checklist completion, facilitated by team leads, and supported by regular financial check-ins with the S4 leadership and the Financial Services team. Success will be measured by ensuring that each team stays within its allocated budget for the fiscal year, as confirmed by a final report from the Business Office.

Progress:

Each S4 team monitors its budget on a monthly basis. Monthly meetings with Financial Services ensure ongoing budget compliance and quarterly checklists support accurate reporting.

I also established a structure for site-based billing to process the various staffing agency timesheets and invoices at the building level, improving oversight and budget accuracy. Site-based budgeting now provides a clearer view of where spending occurs and oversight for the personnel.

Additionally, I have met with Lou Gatta and Terrance Little to identify transportation savings, such as integrating general education and special education routing. Improved accounting for transportation costs will now reflect specific student demographics (EL, SPED, MKV) rather than grouping all under special education, providing a clearer representation of expenses. The Health Services Coordinator has also implemented a system to reassess McKinney-Vento eligibility, facilitating state reimbursement opportunities and cost-sharing with resident school districts.

Focus Area 3: Retention

Strategic Goal 4- Recruit, select, develop, and retain highly effective staff and partners invested in the best educational opportunities and support for all students and staff

Goal: By the end of the 2024-2025 school year, the S4 department will implement teacher retention strategies by developing and administering (1) a teacher satisfaction survey in collaboration with HR, discipline-specific PD on five (5) school improvement days, and establishing two (2) university partnerships.

Progress:

The third department-wide goal is for the S4 multilingual and IES teams to implement teacher retention strategies. These teams have collaborated on PD offerings and developed their own PD experiences to enhance teacher capacities and overall satisfaction. PD has been a focus area, as research indicates that teacher retention is closely linked to job satisfaction. In addition, the IES and Multilingual teams are in collaboration with the HR department to establish university partnerships, get affiliation agreements signed for local universities to support the placement of student teachers, and a teacher satisfaction survey we will finalize in February.

Focus Area 4: SDRP Champion Work - Special Education (IES) Audit

As a champion for the Special education audit component of the SDRP, I am collaborating with IES coordinators, IES educators, cabinet members, departments, and building administrators to learn the current reality of our special education continuum, staffing, scheduling efficiencies, allocations, and out of district placements.

Progress:

- Work with HR to identify which paraprofessionals support special programs and IEPs to streamline assignments. This will help us identify which are not directly supporting IEP and what the next steps will be as it relates to their assignments.
- Collecting insights from learning walks on the service continuum efficiency, and potential improvements for staffing and scheduling.

Next Steps:

My next step is to gather information through a survey of IES teachers, related service providers, and administrators. Additionally, I am scheduled to meet with the SPED/Inclusion Committee to review our current reality and needs. This will help us better understand how to improve efficiencies in the special education continuum, staffing, scheduling, and out-of-district placements.

In the next weeks, I plan on meeting with sped audit team to identify a work plan focused on assessing efficiencies in the following areas:

1. Sped Continuum, including out placements
2. Out-of-district placement
3. Educator Scheduling

4. Educator Allocations

Plans are also underway to collaborate with RAD for student outcome data analysis and connect with Northwestern for research on special education models and with WestED Consulting for support on special education audit specific to creating a formula for FTE.

Challenges:

- Currently, my main challenge in this area is balancing the significant time demands of day-to-day operations with my role in championing the SDRP work. I anticipate that within the next couple of weeks, I will have a clearer understanding of the timeline for this work and the necessary next steps.



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SCHOOL DISTRICT 65

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TO: District 65 School Board

CC: Cabinet Members

**FROM: Terrance Little, Assistant Superintendent of Safety,
Climate, and Athletics**

DATE: 11/01/24

RE: 3-6-9 Board Update for SCA Department

Objective: xxx Information Discussion Follow-up Decision

Goal 1: Budget Management

Strategic Objective 5.4: Develop a process to review current programming for return on investments and expand or add new programs aligned with the district's equity practices.

SMARTIE Goal:

By June 2025, implement a comprehensive, equity-focused budget monitoring system for the Safety, Climate, and Athletics Department that ensures 100% alignment with district priorities, improves resource utilization efficiency by 3% (3% budget reduction from the previous year), and increases transparency in financial reporting, while actively involving stakeholders in the budgeting process.

- **Budget Utilization Efficiency**
 - **Measure:** Percentage of allocated funds effectively used within the fiscal year
 - **24-25SY Progress:** Currently on track for a 3% increase in efficiency by closely monitoring spending patterns and maintaining a \$1,000 per school day reduction in transportation costs despite a 14% contract increase for this school year.
- **Stakeholder Engagement**
 - **Measure:** Number of Transportation budget planning sessions involving stakeholders (other departments)
 - **24-24SY Progress:** Hosted two Transportation Finance sessions (09/26 and 10/24), including representatives from Finance, Specialized Services, and other stakeholders, to review and refine budget processes, aligning with equity-focused budgeting.

Goal 2: Disproportionality and RTO Management

Strategic Objective 1.5: Ensure access to and monitoring of participation in wrap-around services that include pedagogical, social, emotional, and psychological support to achieve high standards of excellence.

SMARTIE Goal:

By the end of the school year, District 65 will implement a comprehensive "Positive Climate Initiative" through the FACE Liaisons to reduce disciplinary incidents of levels 3, 4, and 5 by 5% and increase student and staff-reported feelings of safety and belonging by 3%, ensuring equitable outcomes across all demographic groups through

data-driven, culturally responsive practices and community engagement, ultimately fostering a more inclusive and supportive learning environment.

- **Disciplinary Referrals Rate**
 - **Measure:** Percentage reduction in disciplinary referrals (Branching Minds) of levels 3, 4, and 5
 - **24-24SY Progress:** Achieved a 50% decrease in incidents from SY23 to SY25, with significant reductions among Black/African American students (67%) and overall decrease in incidents for students with Free/Reduced Lunch status.
- **School Climate Survey Results**
 - **Measure:** Percentage increase in reported feelings of safety and belonging
 - **24-25SY Progress:** Early survey data indicates positive trends, with a 2% reported increase in feelings of belonging among students across demographic groups, according to data from the RAD Team.
- **Community Engagement**
 - **Measure:** Establish and grow at least two community partnerships related to a positive school climate
 - **24-25SY Progress:** We have met and have continued to schedule meetings with the Moran Center to develop a partnership for wraparound services at our students' homes or in the community after hours. This initiative aims to provide additional social-emotional support for our students.

Goal 3: Concierge Safety Management Team Progress Monitoring

Strategic Objective 1.1: Ensure all schools have positive school climates built upon transparent and equitable policies and practices where all members of the school community feel emotionally and physically safe, included, and accepted.

SMARTIE Goal:

By June 2025, the Concierge Team will implement a proactive, equity-focused safety approach across all schools in District 65. They will respond to and address all level 5/critical criterion indicators, increase student-reported feelings of safety by 3%, and ensure equitable treatment across all demographic groups, particularly focusing on traditionally overpoliced student populations.

- **Training Compliance**
 - **Measure:** Percentage of Concierge team members up-to-date on required training (e.g., emergency procedures, first aid)
 - **Progress:** Currently at 100% compliance, with all team members having completed recent emergency and cultural sensitivity training.
- **Building Security Audits**
 - **Measure:** Conduct one comprehensive security audits for three school building
 - **Progress:** Completed initial audits at 50% of schools. Findings have been logged and submitted within the required timeline.

Summary of Progress and Key Achievements:

- **Budget Efficiency:**
 - Reduced transportation costs by \$1,000 per school day compared to last year despite contract increases, achieving significant budget utilization improvements.
- **Positive Climate Initiative:**

- Reduced disciplinary incidents by 50% from SY23 to SY25. Key reductions include a 67% decrease in incidents for Black/African American students and positive attendance trends across all demographics.
- **Safety and Response:**
 - Due to ongoing issues, we haven't been able to roll this out yet.

Additional Impact Points:

- **Attendance Successes:** District K-8 Average Daily Attendance (ADA) at 95.5%, exceeding district goals, with ADA across racial/ethnic groups above 94%.
- **Continued Focus on Equity:** We remain committed to addressing disproportionality in behavior incidents among students with IEPs and those with Free/Reduced Lunch status.



**EVANSTON/SKOKIE
SCHOOL DISTRICT 65**

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TO: District 65 School Board

CC: Dr. Angel Turner, Superintendent

FROM: Dr. Stacy Beardsley, Asst. Superintendent, PMA

DATE: November 4, 2024

RE: 3-6-9 Update for Perf. Management and Accountability

Objective: X Information Discussion Follow-up Decision

This memo provides a quarterly update on the Performance Management and Sustainability priority goals and work related to the School Deficit Reduction Framework.

PMA Goals Progress to Date

Goal 1: Program Evaluation

By June 2025, a comprehensive program evaluation process will be developed to assess programs for impact, equity and cost effectiveness. The program will be used to complete one program evaluation and initiate at least one per District department. Feedback will be gathered to improve the program evaluation process for future work.

During quarter one, the Research, Assessment, Accountability, and Data (RAAD) team completed the process of finalizing a draft of the program evaluation handbook. This includes training resources, templates, and the comprehensive handbook. The resources were reviewed by a subset of internal and external stakeholders to gather feedback. The feedback was used to make final revisions prior to finalizing our Version 1.

The team is working with other departments to identify the focus for the pilot evaluation that will be completed this school year. The team also intends to work with program leads (that are not engaged in the pilot evaluation process) to build a program cover sheet that clearly outlines the program(s) purpose, goals and benchmarks (where this does not already exist) to ensure that programs are at a state of readiness for a program evaluation in future years.

Goal 2: Sustainability

By May 30 2025, a thoroughly vetted district-wide sustainability program plan will be presented to the D65 School Board including:

- *Vision of sustainability in D65,*
- *Categories of focus,*
- *Goals / targets,*
- *Strategies to achieve / implementation*

And aligned to the City of Evanston and Village of Skokie sustainability program plans and District 65 strategic priorities will be included in D65 school board policy as a commitment to advancing D65 sustainable practices.

Karen Bireta has organized a [working group](#) to help to develop the first ever District 65 sustainability plan. The team consists of a variety of stakeholders including DEC leadership, D65 and D202 staff and students, City of Evanston employees, City of Skokie employees, Evanston Public Library employees and members of multiple climate oriented community based organizations in Evanston.

This team is meeting approximately every three weeks starting in October to develop a District plan that will be brought to the Board for feedback and to review a possible revision to Board policy (Policy 4:70). The team has met two times including time spent reviewing sample plans from other Districts to frame our direction and the team has begun to develop the vision and categories of focus for the plan. District 65 is looking to use this plan to support our alignment with Evanston CARP goals and to make further progress in operating in a sustainable and fiscally responsible manner.

Goal 3: Financial Management

By June 30, 2025, 100% of the PMA team will have strengthened budget and financial monitoring skills as measured by:

- *100% of the teams finish the fiscal year having spent no more than 100% of their budgeted funds.*
- *The department as a whole spends less than 100% of our budgeted funds.*
- *Quarterly budget check process is followed with 100% fidelity by team and department leaders.*
- *FY26 budgets are informed by FY25 actuals and District priorities.*

The Performance Management and Accountability team has been collaborating with the Financial Services team to define a process for monitoring the departments spending as well as strengthening the departments understanding of the contract process, p-card procedures and Infinite Visions tools. In October, the team engaged in professional learning focused on 1.) the use of IV for monitoring budgets and 2.) the District 65 contract process. The team is coming back in November to engage in a quarterly review of budget to actuals in to review and assess

spending to date as well as to adjust forward facing plans as needed based on financial information and resources available.

SDRP Champion Work - School Closing/Consolidation

I am championing the school closing/consolidation portion of the School Deficit Reduction Plan work. I am working closely with individuals from the Financial Services department and the Strategic Communications and Project Management Department to plan and begin to execute this process.

The work in this area started with a review of the literature and tools from other Districts or entities that could help us to navigate the difficult and impactful school consolidation/closure work well. In particular, the Broad Foundation Toolkit on School Closure has proven to be a helpful resource for defining a process to gather input, define categories and criteria for scenario development, gather relevant data, and for vet scenarios ultimately to create recommendations for the School Board.

To date, the team has developed initial estimates of potential cost savings if a building was closed. This is an initial estimate to apply generally. As we get deeper into the process there will be more specific costing. We have also finalized survey questions for the community to gather input on categories and criteria, defined a draft work plan and identified an initial group of stakeholders that we are reaching out to invite to join us to provide input and feedback at three critical points in our process: 1.) finalizing the categories/criteria and weighting in November/early December, 2.) initial feedback on scenarios in December/early January and 3.) a second round of feedback on scenarios later in January/early February. The goal is to bring forward recommendations in February.



TO: Dr. Angel Turner, Superintendent
CC: District 65 Cabinet Team
School Board
FROM: Melissa Messinger, Exec. Chief of
Strategic Comms. & Project Management
DATE: November 4, 2024
RE: 3,6, 9 Milestone Memo for SCPM goals

Objective: ☒ **Information** ☐ **Discussion** ☐ **Follow-up** ☐ **Decision**

This memo provides a quarterly update on the Strategic Communications and Project Management (SCPM) priority goals, including a key focus area of work related to the School Deficit Reduction Framework. It's important to note that given the nature of the responsibilities within this team much of our time is spent supporting ongoing communication needs that emerge throughout the school year and that are not necessarily a part of our goals or yearly work plans.

SCPM Goals - Progress to Date

Goal 1: Communication Plan for Standards Based Grading

(Strategic Goal 3 - High Quality Teaching & Learning to Support Student Success)

By the end of the 2024-2025 school year, the strategic communications team will implement a communications plan in support of the Instructional Leadership Department to build parent/caregiver awareness of understanding of the shift to standards based grading in middle school, as measured by marked improvement in a community-based SBG periodic pulse survey and other engagement measures.

During Quarter 1, our Strategic Communications team has partnered with the Instructional Leadership team on developing a communications plan focused on building understanding on the shift to standards based grading in middle school. To gather data and root community voice in this plan, a "pulse check" survey was issued in September to middle school families which garnered 587 responses that elicited a range of opinions and level of understanding. A communication plan was developed that leverages a mix of outreach strategies leveraging in-person engagement and technology.

In September, we took advantage of the opportunity to have in-person presentations and show a video produced in-house at the curriculum nights held at various schools. Our team also produced a video series called 'Teacher Insights' which are short snippets of educators talking about their experiences and classroom practices related to standards based grading. Additionally, our website was updated to contain the most up-to-date SBG/L information; which is used as a resource hub. All of the information is being shared through multiple sources including school newsletters, the Fast Five, social media,

Superintendent's scoop and in-person meetings. Additionally, on the Pulse Check, we asked families to indicate interest in attending a focus group. This was held on October 30 and had only 8 participants; despite 70 who indicated interest. The meeting was rescheduled once to accommodate schedules and in-person and virtual options were offered. Despite a small turnout, good insights were gathered that will further inform our strategy in Q2.

Goal 2: Foster School Transition & Construction Progress

(Strategic Goal 1 - Access, Equity, and Opportunity)

By the end of the 2024-2025 school year, establish and implement a SAP III process that engages various stakeholders in developing a Foster School transition plan focused on community building and that takes into account the impact of the significant shifts in student enrollment across District 65 schools.

Foster School Transition Committee

In October, Kirby Callam, Director of Strategic Project Management, and Dr. Charmekia McCoy, Chief of Schools Management and Academics, announced the start-up plan for the Foster School Transition initiative. This included application for membership, a scope of work, and a project timeline. A communication and engagement plan was put in place to recruit interested individuals with a specific focus on those connected to Foster School.

The committee will be charged with helping the new principal with decisions regarding Foster School and in forming sub-committees to determine new and prospective family engagement, out-of-school program designs to support a STEM focus, celebrating and honoring the legacy of the 5th Ward and Foster School inside the school walls, and other aspects of the school culture and environment as they are identified. The Committee will be made up of parents/caregivers, content experts, community members, organization representatives, and District 65 administrators and staff.

The Foster School Transition Committee will have its first meeting on November 13. Over 30 applications have been received with a majority of respondents from the 5th Ward. We are still engaging in outreach and are working on making personal, targeted appeals to expand the committee to be more representative of the future Foster School community.

Foster School Construction

Goal: By the anticipated opening of the school in fall 2026, the Project Management team is tasked with helping to ensure school construction remains on budget and on-time and that key milestones and deliverables are met within the district's locus of control, a key area of focus will remain on being good neighbors and collaboration within the Fifth Ward community throughout the construction process.

In quarter one, we saw a significant amount of construction work underway at the Foster School Construction site which is incredibly exciting! In July a groundbreaking ceremony was held and with the approval of Bid Group I, which came in slightly under budget, site improvement work began in late August and is nearly complete. In July the School Board also approved its naming of Foster School and Phoenix mascot following a community engagement process which included the establishment of a committee, survey, and community meetings.

During this time the permitting process was completed in close partnership with City of Evanston staff. Additionally, the District received City Council approval for an amendment to the Foster School Ordinance to not require rooftop metal screen fencing on the Simpson street side of the building, a projected savings of \$100K as well as approval for the funding for the school track (\$160K) and half the costs for the field lighting (\$47K) using 5th Ward TIF funds. We continue to work in close partnership with the City of Evanston and Family Focus as the project develops.

Bid Group II was presented and approved by the School Board in October, with the exception of the steel package which is being re-bid in an attempt to reduce costs. This will have a slight impact on the timeline.

Community meetings are also being held to design the school's three learning gardens along with the three adjacent edible gardens at Family Focus and Fleetwood-Jourdain coordinated by Evanston Grows.

During Q1, we released an Owner's Representative RFQ and collected six submittals. A recommendation will be made to the Board at the November 4 Committee of the Whole Meeting.

Goal 3: Structural Deficit Reduction Plan Communication and Engagement

(Strategic Goal 5 - Long Term Financial Stability)

By the end of the fiscal year (June 30, 2025), the Strategic Communications team will have developed and implemented a multipronged communication plan aligned to the structural deficit reduction plan framework that leverages various outreach strategies and engagement methods to build understanding and root decision-making in community voice with an intentional focus on historically marginalized communities.

The Strategic Communications and Project Management team is supporting the Structural Deficit Reduction Planning (SDRP) work on a macro scale to help ensure a robust process that is driven by community voice. On the back end, this includes change management and communication to help mitigate the impact on various stakeholder groups as the SDRP is operationalized and reductions are ultimately realized.

The SCPM team supported various communications and presentations during quarter one which included FY24 and FY25 budget updates, structural deficit reduction plan framework, as well as updates being made to enhance the district's financial management practices.

A great deal of time was spent in October focusing on a community budget survey that can be used to broadly engage stakeholders to help shape values and priorities as it relates to the structural deficit reduction plan. We are deeply grateful for the partnership of various faculty and students at Northwestern University in the design and analysis of this survey which is set to be released in November. This is only one of the ways we will engage stakeholders in the process. Survey data will be used to facilitate various community meetings and focus groups to dive deeper into the areas within the survey and get even more feedback from the community.



**EVANSTON/SKOKIE
SCHOOL DISTRICT 65**

Every Child, Every Day, Whatever it Takes

TO: District 65 School Board

CC: Dr. Angel Turner, Superintendent

FROM: Tamara L. Mitchell, SFO, Chief Financial Officer/CSBO

DATE: November 4, 2024

RE: 3-6-9 Update for Financial Services

Objective: X Information ___ Discussion ___ Follow-up ___ Decision

This memo provides the 1st quarter update on the Financial Services Department goals as aligned to the strategic plan, along with an update on work related to the Framework for Deficit Reduction Plan.

Financial Services Department Goals Progress - First Quarter of FY2025

Goal 1: Department Budget Monitoring

By March 31, 2025, improve knowledge of and access to department and school budgets systemwide with a focus on cost containment. Focus on Departmental Budgets will be ongoing. Increase use of and monitoring of departmental budgets by 80%.

During the first quarter, the Financial Services (FS) Department collaborated with both the Human Relations Department and the Schools Management Team on implementation of site-based accounting to monitor lunchroom supervision salary and agency expenditures. The HR Department developed a lunchroom supervisor allocation tool that is student-enrollment based, and the Schools Management Team has partnered in monitoring the budget and staffing related to lunchroom supervision.

The FS Department also collaborated with Student Specialized Services and Supports (SSSS) to create site-based budgets for agency related services personnel. These budgets are being monitored by the SSSS team.

Members of the FS Department have facilitated 1:1 and group training meant to strengthen end users' knowledge and understanding of the budget monitoring process, cooperative purchasing and p-card use. Department team members are embarking on a Training Tour during the 2nd quarter, with the first day of the tour being October 31.

Goal 2: Financial Services Team Management

Develop and implement a professional learning/development plan for financial services team members by March 31, 2025 that is aligned to professional growth, implementation of best practices, and efficiency improvement. At least 75% of team members will participate in professional learning as a result of this plan.

Work to create individual learning plans is ongoing. Four members of the FS Department participated in no-cost user group training provided by Tyler Technologies on October 3rd - 4th. Additionally, members of the Payroll Team will be attending a payroll seminar hosted by Illinois ASBO on November 6th.

Goal 3: School Consolidation Pathway Modeling

Develop and finalize a School Consolidation Pathway model in collaboration with Performance Management and Accountability (PMA) by March 31, 2025, ensuring optimal use of district buildings, addressing walkability, and minimizing impact on marginalized and disadvantaged students, in alignment with the SAP III process.

Dr. Beardsley, Kirby Callam and myself have a standing weekly meeting regarding this work. To date, we have developed a draft planning template that includes tentative authentic questions, identified potential stakeholder group members, and identified potential content experts.

SDRP Work

I am championing the portion of the Framework for Deficit Reduction Plan that is focused on identifying resources to address major capital needs, while taking a leadership role in the work overall. The skeletal deficit reduction plan presented during the September board meeting as part of the budget transportation will be used to drive further work. As for major capital needs, this work is aligned with work that Dr. Beardsley is championing related to school closing and consolidation, we have been able to partner.

To date, the PMA team has developed and shared initial estimates of potential operational cost reductions related to building closure. Having this information is key, as those estimated cost reductions can be repurposed to any capital improvement plans. Additionally, Northwestern University partners with an interest in the work were identified during our October 16th meeting, and more will be shared on that collaboration in the 2nd quarter update.



EVANSTON/SKOKIE
SCHOOL DISTRICT 65

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TO: District 65 School Board

CC: Dr. Angel Turner, Superintendent

FROM: Tiffany Taylor, Executive Chief of Human Relations

DATE: November 4, 2024

RE: 3-6-9 Update for Human Relations

Objective: X Information Discussion Follow-up Decision

This memo provides a quarterly update on the Human Relations goals and work related to the School Deficit Reduction Framework.

Human Relations Goals Progress to Date

Focus Area 1: Evaluations

Goal: By June 30, 2025, implement a digital employee evaluation tool to build the capacity of our workforce and streamline the performance reviews process.

Strategic Alignment - Strategic Goal #2 and #4

In the first quarter, our HR Director led the foundational efforts to prepare for the November 1, 2024, launch of the evaluation process, focusing on these key areas: User Information (assigning Evaluators and Evaluatees), System Setup (establishing Goals, Rubrics, and Competencies), Training (covering Performance Evaluation Overview and SuperEval usage), and Resource Development (creating Templates and Training Videos).

As we move into the second quarter, our goal is to increase the completion rate of the evaluation process steps among managers and employees by 50%. To achieve this, our team will prioritize assisting staff with system setup and resource utilization to become familiar with the evaluation process.

Focus Area 2: Onboarding/Offboarding

Goal: By April 30, 2025, develop and launch a streamlined digital onboarding and offboarding system that ensures a standardized, efficient, and secure employee lifecycle process for all employees.

Strategic Alignment - Strategic Goal #2

In the first quarter, our Senior Manager of Operations led the initial phase of developing a streamlined onboarding and offboarding process, targeted for rollout at the start of the 2025 hiring season. Phase one centered on assessment and planning, including a series of internal meetings to review the current onboarding process, identify pain points, and map out the existing workflow. Additionally, the HR team worked to define specific requirements for a more efficient and cohesive onboarding/offboarding experience.

As we enter the second quarter, our focus will shift to establishing clear metrics, designing and developing the system, and working closely with the Technology department and Frontline to build a robust technology framework, including system configuration, workflow development, and platform specifications.

Focus Area 3: SDRP Champion Work - Staffing Plan

As the champion for the staffing plan component of the School Deficit Reduction Plan, I am collaborating with Financial Services, Performance Management and Accountability, Strategic Communications, Student Specialized Services and Supports (S4), and Instructional Leadership to address key areas, including:

1. **Section Closures** – Determining RIFs, recalibrating class sizes, and exploring consolidation opportunities.
2. **Paraprofessional Position Review** – Assessing school needs and identifying potential reductions.
3. **Retirement Planning** – Exploring options for retirement incentives.
4. **Reworking School Staffing Models** – Focusing on re-evaluating out-of-classroom positions.

Progress so far includes gathering section closure data and additional data on special education and multilingual programs to form preliminary recommendations. The S4 team has also identified all paraprofessionals assigned to students. Our next step is to collaborate with school leaders to clarify the roles of paraprofessionals not assigned to students, followed by forming preliminary recommendations. Additionally, I am working closely with the CFO to evaluate potential retirement incentive options.