



ALLEGHENY INTERMEDIATE UNIT

Strategic Goals Public Report

2023 - 2024



2023-2024

Strategic Goals Final Report

Allegheny Intermediate Unit Board of Directors

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Introduction

During the 2020-2021 school year, the AIU embarked on the development of a new strategic plan. The administration developed an internal facilitation process and identified key stakeholder groups that would collaborate to create a comprehensive plan to help drive the organization forward.

Through this process, the AIU invited 1,980 internal and external stakeholders to provide feedback on several key strategic concepts embedded within the plan. This feedback was incorporated into new mission, vision and belief statements.

Our Mission

We are an educational community that advocates and advances equitable opportunities
for every learner.

Our Vision

Through equitable access, all learners achieve their full potential.

AIU Shared Beliefs

- Through collaboration we encourage the diversity of thoughts, experiences, and backgrounds and celebrate participation and partnership in all of our endeavors as a connector of entities and resources.
- We ensure programs and services are available, accessible, and valuable to our community.
- We are dedicated to ongoing, evidence-based improvement and challenging the status quo in order to advance education and provide rich and relevant opportunities for all learners.
- We champion education through meaningful teaching, learning, and development across life stages for all community members through equitable access to resources, relationships, and opportunities.
- We believe that we are all educators and learners, regardless of our role in the organization. Education is not limited to the four walls of a classroom, but a life-long process that helps us grow and thrive in a changing environment.
- We believe that demanding anything less than excellence, internally and externally, is sacrificing the potential that all learners possess, regardless of situation or circumstance.
- We inspire innovation by never giving up on seeking creative ways to conquer the dynamic complexities of an ever-changing world for all that we serve.
- We model a culture of excellence, inspiring effective leadership that supports effective teachers, successful students, and a strong community.
- We are responsive to the needs of all learners and work to continuously refine and reform education to meet those needs.
- We honor our commitments and promote fairness, respect, honesty, integrity, transparency, and trust in all that we do.

The strategic planning process led to the development of the following six strategic goals which will guide the organization's activities over the next five years.

- Goal #1: Attract, grow, and retain a high-quality and diverse workforce
- Goal #2: Embrace an innovative mindset throughout the organization and with our school partners
- Goal #3: Serve as a leader and connector for the region in educational best practices
- Goal #4: Provide a shared services model to help educational entities maximize resources
- Goal #5: Influence and advocate for equitable educational policies, practices, and resources
- Goal #6: Communicate and promote programs and services with all stakeholders

The final strategic plan was approved by the AIU's Board of Directors on June 28, 2021 and has become an important foundational document for the agency. The plan provides a transparent overview of where the organization is going and serves as a compass for board members, employees, and external stakeholders.

This document highlights the agreed-upon SMART goals for the 2023-2024 school year that are tied to the six strategic plan goals and related objectives. SMART goals are specific, measurable, achievable, relevant, and time bound, and they highlight specific actions that are typically accomplished within a year.

2023-2024 Strategic SMART Goals

Goal 1: Attract, grow, and retain a high-quality and diverse workforce

1.1	Create effective talent acquisition strategy
1.1.1	<ul style="list-style-type: none"> • Conduct a competitive market analysis and analyze the total rewards package for AIU employees.
1.2	Create effective retention strategies
1.2.1	<ul style="list-style-type: none"> • Implement an Appreciation and Recognition Toolkit with all staff members.
1.2.2	<ul style="list-style-type: none"> • Develop or update job descriptions for all positions.
1.2.3	<ul style="list-style-type: none"> • Implement year two of an employee engagement survey and facilitate focus group conversations with staff members.

Goal 2: Embrace an innovative mindset throughout the organization and with our school partners

2.1	Define, model, and promote what innovation looks like across the organization
2.1.1	<ul style="list-style-type: none"> • Highlight and communicate organizational innovations through monthly newsletters, blogs and social media.
2.2	Create internal projects and opportunities dedicated explicitly to innovation within AIU programs and with school partners
2.2.1	<ul style="list-style-type: none"> • Analyze the feasibility of implementing a model early childhood classroom at the AIU Central Office.
2.2.2	<ul style="list-style-type: none"> • Explore and implement programs that expand the educator pipeline (teachers, nurses, paraprofessionals, social workers, etc.)

Goal 3: Serve as a leader and connector for the region in educational best practices

3.1	Understand the needs of our community
3.1.1	<ul style="list-style-type: none"> Disseminate key research and data to internal and external stakeholders in the region.
3.2	Work alongside/in support of Local Education Agencies (LEAs) as they enhance educational programming
3.2.1	<ul style="list-style-type: none"> Review the tuition model and long-term facilities plans for the three AIU-operated special education schools.

Goal 4: Provide a shared services model to help educational entities maximize resources

4.1	Communicate to stakeholders shared services offerings
4.1.1	<ul style="list-style-type: none"> Develop shared services marketing materials that highlight available offerings.
4.1.2	<ul style="list-style-type: none"> Identify and meet with school districts that may benefit from the shared services model and determine the capacity needed to support the work.

Goal 5: Influence and advocate for equitable educational policies, practices, and resources

5.1	Engage with AIU stakeholders, other entities, the community, and decision makers to positively impact public policy
5.1.1	<ul style="list-style-type: none"> Plan and begin a public education campaign that highlights positive things happening at the AIU and in member school districts.
5.2	Build resources that will support and advance policy efforts
5.2.1	<ul style="list-style-type: none"> Identify advocacy ambassadors in each AIU division to assist with forming and implementing advocacy strategies.

Goal 6: Communicate and promote programs and services with all stakeholders

6.1	Create a robust and comprehensive communications plan for the organization
6.1.1	Conduct a data ecosystem audit of critical applications, data management and reporting tools, and internal information warehousing sites and propose recommendations for improvement.
6.2	Enhance communication efforts with external stakeholders
6.2.1	<ul style="list-style-type: none">• Conduct a comprehensive evaluation of Customer Relationship Management systems, including analysis of features, functionalities, costs, compatibility and sustainability.
6.2.2	<ul style="list-style-type: none">• Plan for the launch of a new AIU website.

Strategic Goal #1: Attract, grow and retain a high-quality and diverse workforce

Strategic Objective: Create effective talent acquisition strategy

Conduct a competitive market analysis and analyze the total rewards package for AIU employees.

In public education, people are an organization's most valuable asset. Without staff, programs cannot function, and learners cannot be served. The AIU, perhaps undeservedly, has a reputation for lower salaries than perhaps can be found in the open market. To determine the true value of the salaries and benefits that employees receive, the Human Resources Department conducted a competitive market analysis and analyzed the total rewards package for AIU employees during the 2023-2024 school year. This process included three pivotal steps: define, compare and inform.

Defining the Total Rewards Package

While many employees may think that salary is the only compensation that they receive from an employer, the reality is that compensation can include many items such as health care benefits, paid time off and wellness perks just to name a few. Before it could complete a market analysis, the Human Resources Department had to first define a total rewards package.

In the fall of 2023, the department evaluated industry compensation and benefit leaders such as SHRM, Gartner, World of Work, AiHR, Deloitte regarding the components of total rewards. It was determined that the primary areas included total remuneration (salary, overtime, stipends, bonuses, work orders, etc.), benefits (health, dental, vision, disability, life insurance, paid time off, tuition reimbursement, etc.), and retirement.

Comparing the Total Rewards Package

After all the data was gathered, the AIU's total rewards package was compared with others. Our current programs require individuals with a wide variety of skills and experiences, and because of this it was determined that the AIU competes against many employers in several industries in the current job market. The department analyzed the total rewards packages typically found within private industry, the medical community, other intermediate units, social services, local school districts and others. In addition, the department reviewed information from the National Center for Education Statistics, the Southern Regional Education Board and others. Through this research, the department gained a greater

understanding of how the AIU's total rewards package compares to others throughout the county, state and region.

Informing about the Total Rewards Package

The final piece to this goal's completion was to communicate the value of the total rewards package to AIU employees. The department consulted with Shared Services to determine how to leverage existing technology to organize and present data in a way to educate employees on the total value of their total rewards package. [Sample Total Rewards Statements](#) were prepared for review in Oracle and will be available for publication to employees later in 2024-25. In the interim, manual prospective statements, showing employees what they will receive in the coming academic year will be shared. Employees that work 260-days will be disseminated in July 2024 and employees who work fewer than 260 days will receive statements in September.

By conducting this thorough market analysis of the AIU's total rewards package, the agency gained a better understanding of how its compensation compares with competitors, and how it can be leveraged to attract the best talent for our open positions.

Strategic Objective: Create effective retention strategies

Implement an Appreciation and Recognition Toolkit with all staff members.

Human Resources continued to expand its recognition program through the ongoing efforts of its Rewards and Recognition Committee. The primary focus of the committee was to implement the strategies listed in the [AIU's Recognition Toolkit](#), which was developed by the committee during the 2022-23 school year.

The committee, comprised of association leadership members, past Mission Possible Award winners, and administrators, created the toolkit to provide all AIU employees a resource that explained the importance of recognition and provided meaningful support to those efforts. It provides context for why recognition matters, tools for managers to learn how to recognize and appreciate their staff in a way in which the employee wants to be appreciated, ideas for formal and informal recognition efforts, and resources to help managers with their recognition efforts. The hope was to address the issue of inconsistent and fractured recognition efforts discussed during the prior year.

The Recognition Toolkit was sent to LEAD membership via email on June 28, 2023, for review during the summer. Human Resources hosted meetings in July to further explain the toolkit and to answer questions relating to it. This first wave of implementation focused on training managers to understand the new focus on recognition and appreciation so they could have conversations with their staff when classes resumed in schools in August. The toolkit was

subsequently launched to all staff the week of Aug. 16 via the website and an email campaign.

As discussed with leadership and communicated to all employees, the Recognition Toolkit is considered a “living document” that will continue to be updated and modified as the organization’s recognition efforts continue to grow and evolve. The primary purpose of the toolkit remains the same: to bring together many of the moving parts that the AIU had in place for recognition to help reinforce the position that sincere recognition is one of the most powerful ways to let an employee know they are valued and their work matters.

AIU Employee Appreciation Week

Perhaps the most meaningful change outlined in the Recognition Toolkit by the committee was the need for a unified Employee Appreciation Week. While there are numerous national recognition efforts and appreciation events for various professions throughout the year, the committee felt there was potential for some AIU employees to be missed due to the number of separate roles within the organization. To ensure that dedicated time is created to celebrate our employees, the AIU Employee Appreciation Week program was developed last school year and was set to launch the week of November 13 to coincide with National Education Week.

The committee prepared for the Appreciation Week during its biweekly meetings at the beginning of the school year. As part of the celebration, the AIU created t-shirts with the slogan “One word can make a world of difference” on the back to highlight the importance of sharing positive messages with colleagues. T-shirt orders were collected online, and program leaders assisted in delivering the shirts before Appreciation Week. The t-shirts were included in a gift package that also included an AIU-branded tote bag, a thank you note, and a “Thoughtful Thursday” note that encouraged employees to write a kind message to a peer.

Each day of Appreciation Week had a different event activity to spotlight recognition. It began with “Mindful Monday” that tasked employees with submitting a photo of their workplace at a designated time – 3:15 p.m. – to highlight the diverse work locations of the AIU and the complexity of the organization. More than 100 photos were submitted and collected into an online album using Microsoft Sway. This album was shared with employees later in the week via email and in the employee newsletter.

Employees were encouraged to wear their AIU t-shirts on Tuesday, while “Wellness Wednesday” encouraged programs to create wellness activities that fit their respective schedules to promote both physical and mental health. On Thursday, employees were encouraged to share kind messages with colleagues using the slips provided in the tote, and the week ended with “Fanatic Friday,” in which employees were invited to wear their hometown school and/or team colors. In addition to being a fun activity, having employees highlight their hometowns was a way to show the diversity of the organization and the number of communities we represent.

Recognition Milestones and Awards

During the previous year, the committee had requested that the AIU standardize its milestone recognition efforts to ensure that all employees received recognition for achieving longevity milestones. As a result, all employees reaching the 5, 10, 15, 20, 25, 30, and 35 -year milestones were presented with framed certificates at the end of the school year. These were presented at either in-service sessions or during special ceremonies. Each of the presentations included remarks by AIU leaders that congratulated the employees for their efforts. Additionally, the recognition committee developed a plan to provide a small gift to employees reaching milestones above 20 years. The gifts included AIU-branded tumblers, lunch bags, backpacks, and office bags. Photos were taken during the ceremonies and are being arranged in a Microsoft Sway, like the Mindful Monday activities, that will be shared during the June employee newsletter to end the school year.

The annual award efforts continued through the collaboration of AIU administration and the different AIU associations. The recognition efforts by the organization resulted in a sizable increase in nominations for the AIU's Mission Possible Award, which had 76 total nominations for 54 different employees submitted. This was more than double the prior year. The newly created "Caught in the Act" recognition form was also introduced during the year. This form enabled employees to submit a kind message about how an employee went "above and beyond" in their work, which was then emailed to the recipient and posted on the AIU's intranet site.

STAR Fund

Human Resources created the STAR (Staff Appreciation and Recognition) Fund to support the recognition activities of programs. The fund allowed leaders to draw down from a centralized pool of money to support activities like lunches, food/coffee trucks, AIU swag, and other team-oriented appreciation events. The amount of money allocated was based on program size. There was widespread use of the funds throughout most of the organization, with requests ranging from etched tumblers to catered lunches.

Develop or update job descriptions for all positions.

Throughout the 50+ years of its existence, the AIU's workforce and program requirements have steadily grown. Over the decades, many job positions have been created to meet the emerging needs of learners while others have been sunsetted as education, and society, evolved. While some job descriptions have changed over the years, others have simply been rolled over from employee to employee with little review. As the Human Resources team approached this SMART goal, it was quickly realized that this would be the first time in about 30 years that a robust, comprehensive, agency-wide effort was made to update all job descriptions across divisions and programs.

The team began by identifying position titles and the corresponding job descriptions in Oracle. Surprisingly, thousands of descriptions were identified. A Taleo template was then created so that program directors and supervisors could more easily focus on the qualifications necessary for each position. In an effort to guide managers in the process, the department reissued its job description tool kit which outlined the key steps including identifying job tasks, key responsibilities and establishing qualifications.

During this year-long process, significant analysis and rewriting have occurred in many departments and divisions as directors have researched necessary qualifications and scrutinized organizational structures. The AIU's largest divisions, Special Education and ECFCS, require extensive revisions and will implement a staggered roll-out in the coming six months. All job descriptions in the Teaching and Learning and Internal Service divisions have been updated.

Implement year two of an employee engagement survey and facilitate focus group conversations with staff members.

The AIU continued its employee engagement survey initiative with Energage, an independent research firm, to gather important insights into the workplace culture within the organization. This was the second year of our agreement to have Energage initiate the anonymous survey that connects directly with Strategic Goal #1: Attract, grow and retain a high-quality and diverse workforce.

Our messaging to employees prior to the survey reminded them that their input about their experience working at the AIU is vital to helping the organization develop and redefine its practices and procedures.

During the first year of the survey, 77% of our employees completed the survey, providing us with feedback on areas we can improve and grow. That percentage increased this year, with 78.5% of employees completing the survey between Oct. 30 and Nov. 13. The survey included about two dozen survey questions, including those relating to demographic information and opportunities for open-ended questions. A total of 919 employees provided nearly 2,500 comments and ideas during the survey.

Energage reviewed and compiled the data, ensuring to keep anonymity, and the Executive Leadership Team reviewed the prepared results of the survey in December. The executive director shared a high-level overview of those results with the entire organization the following month, and the results were discussed with leaders at the LEAD meeting in February.

The organizational priorities resulting from the survey include pay, interdepartmental cooperation, and efficiencies.

Strategic Goal #2: Embrace an innovative mindset throughout the organization and with our school partners

Strategic Objective: Define, model, and promote what innovation looks like across the organization

Highlight and communicate organizational innovations through monthly newsletters, blogs and social media.

As a member of the K-12 educational community, the AIU is a hub of innovation. As our region and society changes and evolves, the AIU leads transformational initiatives that impact our internal programs and external partners within Allegheny County and beyond. As a regional leader and connector in educational best practices, the AIU is at the forefront of developing and implementing new practices, techniques, and trends that enhance not only student achievement but also operational efficiency in many educational entities.

A variety of the AIU's innovative practices have been proactively communicated to internal and external stakeholders through owned, earned, and paid traditional and digital media platforms. These platforms include, but are not limited to, the AIU's public website, monthly internal/external newsletters, over 15 social media accounts, our special education blog, a biannual magazine, digital and print publications, short and long-form videos, employee communications, external media placements, the PennLink listserv, as well as paid advertising such as billboards, bus wraps, and television commercials. Below are just a few examples of recent initiatives that have been highlighted. (Additional examples are provided on attached infographic.)

- The AIU has become nationally recognized as a thought leader in artificial intelligence (AI) and its use in the classroom. Our curriculum experts have assisted policymakers, PA Department of Education, school leaders, administrators, and teachers throughout the Commonwealth. The AIU team continues to communicate the potential of AI in educational settings, emphasizing both its role in enhancing learning and the importance of responsible use and accountability for all.
- In an effort to proactively address the national educator shortage, the AIU, in partnership with Point Park University and Bloomboard, has pioneered a revolutionary program that helps current classroom paraprofessionals become certified special education teachers. The first cohort began classes in March 2024, and spaces are already filled for the fall.

- In August, the AIU will open a new Head Start classroom at the Central Office location in the Waterfront. In addition to providing educational opportunities for young children in the immediate area, the learning space will also serve as a training site for early childhood educators to develop their instructional skills using best practices in real time.
- The AIU's Shared Services initiative continues to attract the attention of school entities interested in achieving efficiencies in administrative functions. The AIU's shared services model delivers results by consolidating, standardizing, and automating common functions, providing economies of scale, mitigating personnel staffing risks, and advancing student-facing initiatives. The AIU's Shared Services team consists of professionals in the ACCESS, Business Office, Human Resources, Marketing/Communications, and Technology Services areas.
- The AIU has become nationally recognized as a leader in school safety and security by consistently coordinating efforts and approaches with local law enforcement and school personnel. Over the past year, the AIU's Safety and Security Office has established a regional assistance group with local school districts to provide immediate support in the event of a major incident that exceeds the home district's response capacity. Also, the AIU acquired and shared its own FCC radio frequency to facilitate communication in case of a significant incident requiring evacuation, relocation, and/or reunification.
- The AIU has played a pivotal role in social-emotional learning and in restoring community-based relationships through restorative practices in both school and community settings. Current programming has been highlighted both regionally and statewide, with collaborative sharing extending across state lines.
- The AIU has been a leading member of a large grant initiative called Project SEEKS SES (Supporting Expansion and Enhancement of K12 School-based Social, Emotional Supports). Project SEEKS SES aims to help school districts improve support for social and emotional health and to develop a local workforce for these fields. Funded by the Allegheny County Health Department and managed by the AIU, it addresses trauma, behavior, and mental health issues exacerbated by the COVID-19 pandemic.

As education and society continue to evolve, the AIU will remain at the forefront of innovation in the region's education ecosystem.

Forward-Facing Innovative Practices

Advocacy

Introduced

- Conduct Legislative Breakfast
- Participate in Day on Hill with all "P" groups
- Recruit for Advocacy Ambassador Program

Improved

- Connect with Regional Representatives
- Continue Legislative Forum with Hybrid Component
- Expand Advocacy Letter Campaigns

DEI

Introduced

- Create Gender Identity Policy
- Execute Heritage Month Celebrations
- Host Hot Topic Lunch & Learns
- Implement Internal DEI Trainings

Improved

- Broaden Policy Updates
- Expand Regional DEI Conference
- Update Recruitment Training Process
- Utilize Oracle Journey Training Platform

ECFCS

Introduced

- Engage in Mental Health Contract with Sprout
- Expand Handle with Care to TEAR
- Implement Home Visiting Curriculum for Fatherhood Program (24/7 Dads)
- Implement PBIS at Academic Institute (ACI)
- Implement Restorative Practices in AEP
- Use QR Codes for Parent Applications

Improved

- Conduct Curricular Review/Analysis for APS
- Schedule Reading Buddies for Pre-K Counts
- Secure PCCD Grant with Sto Rox SD related to Violence Reduction

Spec Ed

Introduced

- Create Entrance/Exit Criteria for Vocational Ed Programming at Sunrise
- Expansion of the Vocational Programs at Mon Valley
- Implement Code Jumper for students w/ visual impairments

Improved

- Alter OT/PT Clinical Supervisor Positions to include Planning & Implementation of School-based Physical Therapy Programs
- Create New Positions in PEI to Increase Efficiencies in Programming and Services
- Expand Life Skill Curricula to include Remote Tool Usage (ie Zoom/Teams/Google)
- Research Codifying the Effects of the Primary Expression Classrooms

T&L

Introduced

- Developed New PD catalog for WFL to include Data Supports and Specialized Assistance
- Execute Teacher Induction Courses
- Focus on Learner Centered Initiatives to Promote Personalized Learning Experiences
- Revise Programming to include Customized and Individualized Services
- Targeted Offerings Related to Universal Design, IES Guides, and Systems Thinking

Improved

- Increase Parent Engagement through Training Session Offerings and Customized Reports for WFL Clients
- Streamline NSPS Paperwork

Internal Service Innovative Practices

Introduced

- Align Oracle with Amazon Wish List Feature
- Implement Oracle Fusion with Shared Service Districts

Improved

- Create Centralized Location for Salary and Benefit Documents
- Highlight Grant Completion Percentage on Monthly Reports
- Transition ESY timesheets and Billing Process to Oracle
- Transition from Paper to Electronic Timesheets

Introduced

- Transition Data from Server Drivers to Sharepoint
- Update ID Badge Tracking Sheets
- Update PAeducator Site
- Utilize Taleo for Tracking New Candidates & Internal Moves

Improved

- Transition Master Staffing Sheet to Google Suite
- Update Job Descriptions
- Update Onboarding/Offboarding from Paper to Electronic Forms

Introduced

- Create New Position for Contract/Grant Management
- Research Contract Management Platform

Improved

- Modernize Board Agenda Creation/Execution
- Modify Clearance Process
- Revamp of AIU Policy Committee

Introduced

- Engage in Marketing Campaign with M7
- Expand Shared Service Model
- Include Videographer as Stable Part of Staffing
- Use New Publications and Communication Mediums

Improved

- Increase General Internal Communications
- Increase Response Time to Crisis Situations/Communications
- Expand Social Media Presence with Addition of Videos, Photography, and Branding
- Secure Division-level Support for All Areas of the Organization
- Update Internal Policies

Introduced

- Configure Flexible Technician Positions
- Implement "AIU Launchpad"
- Implement Automated Signon - Onesync
- Research Data Governance/Management Systems
- Utilize Heat Mapping for Tech Audits

Improved

- Change Phone Carriers for Mobile Services
- Consolidate Printer Services
- Employ PC Management System
- Execute Phone System Migration
- Improve Multi-level Infrastructure (ie Datacenter)
- Improve Procurement Procedures for Hardware/Software
- Transition from Server to Cloud Storage

Finance

HR

Legal

MarCom

Tech

ALLEGHENY INTERMEDIATE UNIT
INNOVATIONS AT WORK



This week, we hosted the inaugural Fatherhood Conference held by Fathers Collaborative Council of Western PA in partnership with **SHADCSH**. This productive forum allowed social service providers to hear from fatherhood experts about the best ways to engage and understand fathers.

Fatherhood Conference by Fathers Collaborative Council of Western PA



ESL Student Event at La Roche University

The AIU hosted its annual **ESL Student Event Day** on April 19 at La Roche University. The event fosters cross-cultural connections and enriched language learning for students in grades 9-12 who are enrolled in an ESL program. Check out the photo gallery <https://www.aiu.edu/news>



Showcase of Interactive Technology for Students with IEPs

Representatives from **Ken2** met at the AIU's Control Office today to demonstrate their innovative **Ken2** mobile apps and hardware. The cards and accompanying software integrate touch and motion based interactive games and lessons designed for students with IEPs.



STEEL Standards with Meaningful Watershed Educational Experiences

The **Allegheny**, **March & Science Collaborative** and **AIU-PAWS** teamed up to lead a special professional development workshop for science teachers at local watershed sites. Learn more <https://www.aiu.edu/news> **#WaterWiseSTEM** **#WatershedWise**



Inaugural PBIS Elementary Student Summit

On Friday, more than 50 3rd, 4th, and 5th graders attended the AIU's inaugural **PBIS elementary student summit**. Using games, creative projects, and brainstorming, students from seven schools shared ideas on how to make their schools a better place. <https://www.aiu.edu/news>



ALLEGHENY INTERMEDIATE UNIT
INNOVATIONS AT WORK



Reimagining Learning Environments with transformED & FluxSpace

Educators recently gathered at **FluxSpace** for a **transformED** professional development workshop on reimagining learning environments. Check out free upcoming workshops at www.aiu.edu/news **#AlleghenyLearn** **#TeacherED** **#Education** **#Learning** **#ProfessionalDevelopment**



13th Annual Mock Interview Day for Regional Students

More than 100 teenagers practiced interviewing for jobs with dozens of local employers on Friday as part of the 13th Annual Mock Interview Day hosted by the AIU and the Transition Coordinating Council of Allegheny County, sponsored by **UPMC**. <https://www.aiu.edu/news> **#CareerDevelopment**



AIU Self-Care Day for Regional Educators

"An event like this opens doors, and you get to learn new skills that you can implement into your everyday life." Yesterday, the AIU invited educators throughout the area for an Educator Self-Care Day, introducing educators to several self-care methods. <https://www.aiu.edu/news>



SEEKS Social Emotional Supports Alternatives to Suspension Programs

AIU Greenfield, an alternative to suspension program is making a big difference. Hit the link to read about this Project SEEKS SES supported program. <https://www.aiu.edu/news>



Learning the Basics of Podcasting

A recent **transformED** AIU workshop at **FluxSpace** was designed for educators looking to document, share, and debrief their students' cases through podcasting. Participants received hands-on experience in the studio and practiced basics with the technology. <https://www.aiu.edu/news>



ALLEGHENY INTERMEDIATE UNIT INNOVATIONS AT WORK

Innovation at the AIU
is an approach to create new or improved ways
to best serve the learners, families, and communities
of our organization.

Allegheny Intermediate Unit (AIU) **Following**

Education Program that provides PDE **Professional Educator** requirements for newly hired educators. Join our FREE virtual info session, 7:30-8:30 a.m. on aiu.org/education.

Virtual Info Sessions

EDUCATOR INDUCTION PROGRAM

Wednesday, July 24 | 8:30 a.m.
Thursday, July 25 | 7:30 a.m.

JOIN US VIA ZOOM to learn how the AIU Education Induction Program can meet the needs of your district, charter school, or other school using through comprehensive, high-quality and cost-effective services that meet the state requirements to provide a PDE approved induction program to your newly hired educators.

BRIDGEUP

Build Your Talent Pipeline

Bridge opportunities for upward mobility in education.

An innovative grant writing workshop will guide you through the grant development process — from searching opportunities and ensuring that an opportunity is a good fit, to identifying your program's need and writing up to write fundable applications. aiu.org/grants

Grant Writing Workshop

Wednesday, May 22 | 9 a.m. - 3 p.m.
AIU Central Office

aiu Update

June 2024

INNOVATIONS

With support from Project SEKS SES, our friends at @ChathamAIU will be holding Youth Mental Health First Aid Training throughout the next several months. Check out the flyers for full details and registration.

Health & Safety Resources YOU CAN USE

Youth Mental Health First Aid Training
with Dr. Cristina Lewis and Dr. Kristin Herby

YOUTH MENTAL HEALTH FIRST AID

10-2% of youth experience a mental health crisis each year.

1-5% of youth experience a mental health crisis each year.

50% of youth experience a mental health crisis each year.

EARN 8 ACT 48 HOURS - FREE

1.5 Day Hybrid Training Series

Utilizing Trauma Response Practices in the Classroom Setting

aiu **Waterfront SUMMER GRADUATE** 2024

ENRICH RECOVER EXPLORE

AIU's Waterfront 243 Summer 11 & 12th Grade Seasonal Program

AIU CELEBRATES BLACK HISTORY MONTH

From 1915 to 1968, Black History Month was known as Negro History Week. It was created by Dr. Carter G. Woodson, a Black historian, educator, and author, to honor the achievements of African American people.

Holly Papp, Ph.D., AIU coordinator for School Improvement & Comprehensive Support, coauthored an article published by Education Sciences on the need for training teachers to use digital game-based learning as a tool for promote equity in K-12 STEM education. <https://doi.org/10.31939/2024>

Notable Research & INNOVATIONS

Strategic Objective: Create internal projects and opportunities dedicated explicitly to innovation within AIU programs and with school partners

Analyze the feasibility of implementing a model early childhood classroom at the AIU Central Office.

The model early childhood classroom provides a teaching and training classroom for onboarding new staff and retraining existing staff as needed. With the labor shortage in early childhood education, the Early Childhood Education Program is finding it more difficult to attract employees who have had the types of education and experiences we were fortunate to have in the past. Additionally, the increased need to serve children with different types of learning and behavioral needs is impacting existing staff who need to strengthen their skills in these areas. Thus, this classroom will bring staff into a real classroom to observe how a skilled teacher and assistant work together to manage the classroom and be supported to try the skills in an active classroom environment.

The feasibility exploration began in May 2023 with several internal discussions as well as meetings with representatives from the Office of Head Start to learn what funding opportunities might be available to support the project. Based on these discussions, the Board was presented an overview of costs and the financing plan, which limited funding from the Office of Head Start to room equipment/furniture and the playground construction and the rest supported by the AIU. In August 2023, the architectural firm, HHSDR, was contracted to lead the design process and create documentation for construction bids. Construction bids were distributed in September 2023. The AIU received seven general construction bids, four HVAC bids, two plumbing bids, and four bids from electrical contractors. The Board approved final bids in October 2023 and agreed to the following:

1. For General Construction, to MASCO Construction, Inc. in the amount of \$323,800.00 and the work related to Alternate Bid G-1 to add the General Contractor's work related to the Server Room and the Contract's allowances for \$51,730.
2. For HVAC Construction, to Hranec Sheet Metal in the amount of \$67,000.
3. For Plumbing Construction, to Enders Plumbing & Heating Company in the amount of \$84,100.
4. For Electrical Construction, to Precision Electrical Contractors, Inc. in the amount of \$80,500.
5. Purchase approval of playground equipment from Snider Recreation Inc., from the Omnia Partners cooperative purchasing contract, in the amount of \$38,509.58.

The initial Job Conference to set up the meeting plan for the architect, contractors, and AIU staff occurred on November 11, 2023, and the schedule was set for bi-weekly meetings throughout the construction project. Initial demolitions started as planned in December 2023, and the model early childhood classroom was completed on time as of May 31, 2024, with the playground completed by June 30, 2024.



Explore and implement programs that expand the educator pipeline (teachers, nurses, paraprofessionals, social workers, etc.)

For this goal, we aim to explore opportunities for continuing education, training, or seeking employment based on your degree level. The following captures a small selection of these opportunities, with links included for additional information. As we build upon this goal next year, we will explore additional opportunities not listed here and connect them to career laddering at the AIU. Our objective is to increase recruitment and retention by demonstrating the various paths one's educational and career journey could take within the organization. This information will be published on our website and look similar to this example: ([Example Website](#))

- The headings will serve as drop-down menus.
- The subheadings will list the program or opportunity.
- The paragraphs will be listed as descriptions under each subheading.

I Am Currently in High School

Carlow University: Early Childhood Education Program

Carlow University offers a Pre-Apprenticeship Program for high school students designed to prepare them for a future in education. This program allows students to take college-level courses either at their high school or Carlow University. Upon successful completion (grade C or better), students earn college credit, which is recorded on an official Carlow University transcript. The College in High School options include 100 or 200 level courses at the University open to high school students, courses taught at high schools by university faculty, courses co-taught by high school and University faculty, and Carlow-approved courses offered at high schools. This program aims to provide a seamless transition to higher education, fostering early exposure to college-level academics and supporting the pursuit of an education degree. Click [here](#) for more information.

Gateway High School Teaching Magnet Program

The Gateway Teaching Academy is a comprehensive two-semester program designed to provide an immersive educational experience through a combination of lectured courses, practicum, and hands-on experiential learning in on-campus classrooms. In collaboration

with Carlow University and Indiana University of Pennsylvania, the academy prepares students for future education programs by pairing them with current college student mentors. This mentorship is aimed at fostering guidance and support. The overarching goal of the Gateway Teaching Academy is to encourage diversity within the teaching profession and to ignite a passion for teaching among its participants.

PA Educator

[PA Educator](#) is the premier job site for education, dedicated to enhancing the application process and aiding in the job search for professional school employees seeking positions within Pennsylvania. Catering to all degree levels, PA Educator supports a wide range of roles including educators, administrators, office personnel, education majors, janitorial staff, and paraprofessionals. Applicants can utilize [PAeducator.net](#) to search and apply for positions across Pennsylvania school districts, intermediate units, private academic schools, charter schools, and other educational entities. The platform allows certified and non-certified professional school applicants to instantly send their applications and credentials to school administrators. Click [here](#) to explore opportunities.

AIU Job Listings

The Allegheny Intermediate Unit (AIU) is a liaison with the Pennsylvania Department of Education, proudly operating three special education schools, ten family centers, and about 130 programs for children, adults, and families. If you are interested in a career in a school building, administrative or internal services, supporting families, or community including those who are under-resourced or underrepresented, the AIU may be for you. Please [click here](#) to view current vacancies in Allegheny County.

I Am a High School Graduate

CCAC Education Programs

CCAC's Education programs equip students with the skills and knowledge needed for entry-level positions working with children and youth in various settings, including roles in Headstart, Pre-K Counts, Special Education, Family & Community Centers, and school districts. Students learn best practices in direct care, education, diversity and gain techniques for supporting children with special needs. Through engaging classes, weekly field observations, and hands-on practicums, students develop expertise in human development, health, infant and childcare, family relationships, and the laws and regulations that protect children and their families. Additionally, students become familiar with the array of community resources available to support children and families. Join CCAC to launch your career in education and make a difference in your community. To learn more about these offerings, click [here](#).

Carlow University: Early Childhood Education Program

Carlow University's Dr. Rae Ann Hirsh Apprenticeship Hub for Early Childhood Education is an innovative four-year program designed to enhance the early childhood education system in Pennsylvania. By partnering with community, regional, and national stakeholders, the program aims to improve the quality of childcare, address workforce barriers to credential and degree attainment, and diversify the early childcare workforce. Open to early childhood educators working at least 25 hours per week in certified programs in southwest Pennsylvania, the apprenticeship focuses on elevating childcare quality through higher STARS ratings, better caregiver interactions, and improved environmental ratings, ultimately supporting the social, emotional, and cognitive development of children and narrowing disparities in educational outcomes. Click [here](#) for additional information.

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I Have an Associate's Degree

Bridge Up Program

The BridgeUp program at the Allegheny Intermediate Unit, offered in partnership with BloomBoard, supports working professionals in completing their coursework while on the job. This program provides paraeducators and other support staff with the necessary instruction, coaching, and classroom experience to advance into certificated teaching roles. Paraeducators holding an associate's degree have the opportunity to earn a fully accredited bachelor's degree in special education through this program. To inquire about the program and your eligibility, please contact Avy Schmitt.

PA Educator.net

[PA Educator](#) is the premier job site for education, dedicated to enhancing the application process and aiding in the job search for professional school employees seeking positions within Pennsylvania. Catering to all degree levels, PA Educator supports a wide range of roles including educators, administrators, office personnel, education majors, janitorial staff, and paraprofessionals. Applicants can utilize PAeducator.net to search and apply for positions across Pennsylvania school districts, intermediate units, private academic schools, charter schools, and other educational entities. The platform allows certified and non-certified professional school applicants to instantly send their applications and credentials to school administrators. Click [here](#) to explore opportunities.

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I Have a Bachelor's Degree

PA Educator

[PA Educator](#) is the premier job site for education, dedicated to enhancing the application process and aiding in the job search for professional school employees seeking positions within Pennsylvania. Catering to all degree levels, PA Educator supports a wide range of roles including educators, administrators, office personnel, education majors, janitorial staff, and paraprofessionals. Applicants can utilize PAeducator.net to search and apply for positions across Pennsylvania school districts, intermediate units, private academic schools, charter schools, and other educational entities. The platform allows certified and non-certified professional school applicants to instantly send their applications and credentials to school administrators. Click [here](#) to explore opportunities.

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ESL Certification

The Allegheny Intermediate Unit offers a comprehensive 18-credit [ESL Program Specialist Certification](#) program through a blended model that includes live classes via Zoom, online coursework, and field experience. Taught by experienced ESL professionals and overseen by the ESL program director, each three-credit course requires participants to complete 10 hours of field experience. This program is designed to enhance participants' current instructional capabilities and requires careful planning to integrate field experience into their employment schedules. The ESL Program Specialist Certificate serves as an add-on to another instructional certificate, and upon completion of the coursework, participants must apply to the Pennsylvania Department of Education (PDE) through the Teacher Information Management System (TIMS) to obtain the certification. Additionally, the AIU's ESL program has partnered with Carlow University to offer a master's degree in Curriculum and Instruction with a specialization in English as a Second Language, accepting all 18 credits from the ESL Specialist Certificate as transfer credits. This partnership provides a cost-effective pathway to both ESL certification and a master's degree.

Strategic Goal #3: Serve as a leader and connector for the region in educational best practices

Strategic Objective: Understand the needs of our community

Disseminate key research and data to internal and external stakeholders in the region.


Throughout the last 12 months, the AIU has taken proactive measures to facilitate the dissemination of key research and data on a variety of topics of interest to the K12 education community. Sharing valuable research is essential to fostering meaningful connections and promoting equitable access to opportunities, a core value embodied in the AIU's mission and vision.

To achieve this goal, the AIU curated information from a variety of local, state, and national resources with the assistance of internal stakeholders and other personnel with educational expertise. The AIU initiated outreach early in the 2023-2024 school year to various sources to leverage the agency's extensive network of partnerships and knowledge centers. An extensive repository was created, featuring research on a myriad of topics, including the impact of professional development on student achievement, school policy, belonging, school structures, equity considerations, and many others. After the research was tabulated and categorized, it underwent vetting by members of the AIU's Executive Leadership Team for its appropriateness and relevance before being forwarded to the agency's Marketing and Strategic Communication Department for dissemination to internal and external stakeholders.

For nearly 12 months, research and data were shared in a variety of digital and print publications with AIU employees, educators, and community partners throughout the county and state. The primary platforms included internal and external newsletters, PennLinks, the AIU's biannual Connections magazine, and social media posts. The dates of dissemination and a newsletter sample are as follows:

- November 1, 2023 – AIU Connections Magazine
- November 29, 2023 – AIU Update
- November 29, 2023 – Penn Link
- December 19, 2023 – AIU Spotlight
- December 21, 2023 – AIU Update
- December 21, 2023 – Penn Link
- January 10, 2024 – AIU Connections Magazine

- January 22, 2024 – AIU Spotlight
- January 31, 2024 – AIU Update
- January 31, 2024 – Penn Link
- February 23, 2024 – AIU Spotlight
- February 28, 2024 – AIU Update
- February 28, 2024 – Penn Link
- March 15, 2024 – AIU Update
- March 22, 2024 – AIU Spotlight
- April 1, 2024 – Penn Link
- April 3, 2024 – AIU Update
- April 19, 2024 – AIU Spotlight
- May 1, 2024 – AIU Update
- May 2, 2024 – Penn Link
- May 28, 2024 – AIU Spotlight
- May 30, 2024 – AIU Update



[7 Reasons to Evaluate Professional Learning](#)

Highlighting the importance of evaluating the effectiveness of professional development programs for teachers, this article argues these programs need rigorous assessment to see if they truly improve teaching practices and student outcomes. Such evaluations should identify specific needs, ensure the quality of the program, and assess its impact on educational equity.

Shared by Brian Stamford, Ed.D., **AIU** Program Director, Accountability & Innovative Practices

[Using Artificial Intelligence Tools in K-12 Classrooms](#)

This RAND study examines the patterns and trends of AI use in schools and explores the state of policy development around student and staff use of AI.

Shared by Jacob Minsinger, Ed.D., **AIU** Behavior Training & Consultation Coordinator

[Transforming Teaching through Curriculum-Based Professional Learning](#)

This challenge paper explores how teacher "professional learning anchored in high-quality curricular materials can allow teachers to experience instruction as their students will, change instructional practices, and lead to better student outcomes." The paper included English Language Arts, mathematics, and science in its foci.

Shared by Corinne Murawski, Ed.D., **AIU** Mathematics & Science Coordinator

[Leveraging What Students Know to Make Sense of Texts](#)

This article summarizes the importance of activating prior knowledge and categorizes prior knowledge activation strategies into eight categories, as displayed on the table on page 14.

Shared by Christina Frazier, **AIU** Behavior Training & Consultation Coordinator

Valuable data and information will continue to be shared in the coming months as part of the AIU's mission to contribute to an educational community that advances equitable opportunities, ensuring that all learners have opportunity to achieve their full potential.

Strategic Objective: Work alongside/in support of Local Education Agencies (LEAs) as they enhance educational programming

Review the tuition model and long-term facilities plans for the three AIU-operated special education schools.

When considering the smart goal as written, it's easy to conceive an array of implications for the three AIU-operated Special Education Schools: Mon Valley, Pathfinder, and Sunrise. First, reviewing the tuition model for the school-based programs requires consideration of interests held by at least three stakeholder groups. The core stakeholders with larger fiscal interests in the tuition model include the AIU, the Local Education Agencies (LEAs) sending students to the school-based programs, and the special schools' jointures that comprise the subset of LEAs that own the school properties. Moreover, the review of the current tuition model requires an understanding of how the present model was developed, why it was developed, and when it was developed. In turn, these understandings could help address whether the model is still relevant a decade after it was instituted. Such interests, and the context associated with the current model, suggest a detailed action plan requiring multiple steps. Second, the smart goal directs a review of a long-term facilities plan for schools that the AIU does not own. Again, the same stakeholder groups have a vested interest in the plan or at least require an understanding of the approach to maintaining and upgrading facilities. Any facility maintenance or improvement has fiscal implications. Such implications could have a collateral effect on tuition depending on the model used.

On the surface, recognizing that the smart goal has two distinct factors, tuition and facility maintenance, could easily lead to two or more plans of action addressed at separate times. However, a detailed understanding of the relationships among the stakeholders coupled with the interplay between tuition rates and facility management suggests otherwise. After all, it can be argued that the cost-effective operation of the special education school-based programs, which is the function of the AIU in service to its member districts, should not be addressed without consideration of the facilities that house the programs. Thus, the following question begs to be asked. How best to address a complex, multi-pronged smart goal, that affects different stakeholder groups' interests, knowing that no single group can work independently from one another?

The work on this smart goal began in August of 2023. To start the effort, a core team of four AIU administrators was assembled, two representing fiscal and two representing the school-based program (Table 1).

The core team met numerous times between August and October of 2023. The function of the core team was to set operational guidelines regarding the scope and sequence of work. For example, the core team

Core Team	
Fiscal	Program
Mr. Joseph Lucarelli - Chief Financial and Operations Officer	Dr. James Palmiero – Assistant Executive Director of Special Education and Pupil Services
Mr. Aaron Hassett - Assistant Director of Budget and Analysis	Mr. Brian Welles, Assistant Director of Special Education and Pupil Services

Table 1

defined critical aspects of the tuition model that need to be reconsidered and by whom. However, the core team also determined that prior to discussing the critical aspects of the model, stakeholders need to have a common understanding of the current model. The core team established that ad hoc stakeholder groups will be needed at various times throughout the review. However, the core team will remain constant in their role, advising and directing action steps. An Affinity Chart was used to organize information from the team’s brainstorming sessions, grouping ideas into categories based on their relationships.

In late October the core team vetted its ideas with the AIU’s General Counsel, Joseph Shaulis. The Affinity Chart was presented for the purpose of garnering feedback from a member of the AIU’s Executive Leadership Team who held a vested interest in the outcomes of the smart goal. Mr. Shaulis has worked closely with legal counsel representing each of the three AIU-operated Special Education Schools’ jointure committees in matters of shared interest with the Intermediate Unit. All feedback provided by Mr. Shaulis was addressed. In early November, Dr. Scherrer had the final review of the Affinity Chart. All feedback provided by Dr. Scherrer was address.

The Affinity Chart situated 32 key concepts that were organized into one of four categories (Figure 1).

The four categories were defined as follows:

- Fees and Finances
- Jointure Relations
- Facility Needs
- Future Planning/Alternatives

For manageability, three of the four categories were subdivided into smaller areas of focus.

- Fees and Finances contain the following subcategories: Reconciliation Concepts, Fee for Service, Usage Fees.
- Jointure Relations contain the following subcategories: Agreements, Management, Efficiencies/Shared Positions, Capacity Building, and Awareness.
- Future Planning/Alternatives contain the following subcategories: Contingency Plans, Consolodation, and Ownership Agreements.

The four categories and subcategories were not situated to be a chronological map of action steps, working left to right and top to bottom across the Affinity Chart. Rather, various ideas from several categories could be addressed within the same time periods. The categories and subcategories were assigned an ordinal sequence: one, two, three, or four. Any items assigned to the first sequence were intended to be addressed before those items that fell under the second, third, and fourth seated positions. Work in more than one category was mapped to take place simultaneously. However, it became clear early on that more than one academic year will be needed before all 32 concepts could be processed.



Figure 1

Work with key concepts as part of the first sequence began in mid-November 2023. The following table (Table 2) maps the activities from a monthly perspective.

Month	Category: Subcategory	Concept
November	Jointure Relations: Awareness	Reviewed jointure structure w/ all Special Education Liaisons (part 1 of 2-part presentation). Shared 2023-24 Jointure Overview document .
	Jointure Relations: Efficiencies / Shared Positions	Collected draft job description related to facilities manager (i.e., Mr. Dixon, Mr. Battis., EASSJC & SCASSJC facilities managers, AIU Custodians) Spoke with Mr. Lucarelli, Mr. Dixon about implications of the position
	Jointure Relations: Management	Worked with EASSJC on establishing a Superintendent of Record
December	Jointure Relations: Awareness	Reviewed jointure structure w/ all Special Education Liaisons (part 2 of 2-part presentation) & foreshadowed Ad Hoc teams to convene for subsequent priorities
	Jointure Relations: Efficiencies / Shared Positions	Developed 1st draft job description for AIU Schools Facilities Manager Spoke w/ principals re: financial impact of the AIU Facilities Manager & school building budget for 24-25 in advance of the budget development process
	Jointure Relations: Management	EASSJC appointed Dr. Neil English (Riverview SD) superintendent of record (SoR), stating January 2024, renewable annually by mutual agreement
January	Jointure Relations: Efficiencies / Shared Positions	Shared draft of AIU Schools Facilities Manager job description with HR (established position grade and salary range), Dr. Scherrer, Mr. Lucarelli, Mr. Dixon and both the EASSJC & SCASSJC
	Jointure Relations: Management	Met with the EASSJC re: Jointure Renewal for member districts
February	Jointure Relations: Capacity Building, Agreements, Efficiencies/Shared Positions Facility Needs	Met with EASSJC SoR, Dr. English Discussed year 1 joint priorities specific to Sunrise only: <ul style="list-style-type: none"> • Implement the AIU/EASSJC Agreement - will have to involve Mr. Shaulis and Mr. Evakovich • EASSJC secretary to meet w/ Riverview SD Business Manager to disclosure financial functions of the jointure

		<ul style="list-style-type: none"> Use the HHS DR Feasibility Report 2020 to determine multi-year priorities (2-3 years) re: facilities maintenance & improvement Met with EASSJC
	Jointure Relations: Efficiencies/Shared Positions	Posted the AIU Schools Facilities Manager job description
March	Fees and Finances: Fee for Service	Determined that the salary and expenses for the AIU Schools Facilities Manager would be absorbed by program fees and not back billed to EASSJC and SCASSJC, as previously discussed with the jointures
	Jointure Relations: Efficiencies/Shared Positions	Mr. Dixon, Mr. Fratto, Mr. Campos and head custodian at Pathfinder interviewed round 1 candidates for the AIU Schools Facilities Manager position
April	Jointure Relations: Efficiencies/Shared Positions	Mr. Dixon, Mr. Fratto, Mr. Campos and head custodian at Pathfinder interviewed round 2 candidates for the AIU Schools Facilities Manager position
	Jointure Relations: Efficiencies/Shared Positions	Offer extended and finalized for the AIU Schools Facilities Manager position
May	Jointure Relations: Efficiencies/Shared Positions	AIU Board of Directors approved the hire of Dave Matzie, AIU Schools Facilities Manager (start date July 1, 2024)

Table 2

Most but not all action items addressed this year have been associated with Jointure Relations. However, the work within this category will need to continue beyond the current school year.

Priorities within the first sequence that need to be addressed for the 2024-2025 school year include remaining concepts relating to Jointure Relationships and Fiscal and Fees categories.

Two of the three items assigned to the Facilities category have been seated in the third sequence of action steps. However, preliminary steps are already in the works with respect to a five-year facilities maintenance plan at the Sunrise School and to a lesser extent at Pathfinder. With the onboarding of the AIU-operated Special Education Schools’ Facilities Manager on July 1, 2024, more aggressive work can be coordinated between the AIU and the schools’ jointure committees.

All items assigned to the Future Planning/Alternatives category have been assigned to the fourth sequence of action steps. Again, having the Schools’ Facilities Manager positioned staffed will help in the review of Contingency Plans.

Strategic Goal #4: Provide a shared services model to help educational entities maximize resources

Strategic Objective: Communicate to stakeholders shared services offerings

Develop shared services marketing materials that highlight available offerings.

Goal 4 of the AIU's Strategic Plan focuses on the development of a shared services model which will help educational entities maximize their resources. As part of the effort to communicate shared services offerings to stakeholders, the shared services team developed a marketing plan that consolidates resources and efforts. The shared services team consists of representative leadership from the AIU's four internal services departments: finance, human resources, marketing/communication, and technology services. The marketing plan incorporates an overall/umbrella goal with specifically defined audiences as well as strategies, tactics, and personnel responsible.

Over the 2023-2024 school year, the AIU's shared services team continued to build its client base and solidify its position as an education leader with expertise in K-12 business processes. In its continued effort to communicate shared services offerings to stakeholders, the team completed key marketing activities and milestones. Members gathered market research and developed a greater understanding of similar services offered by other intermediate units. In addition to surveys, the Technology Department developed Product SOS, a graphic database tool that aggregates information about district systems and allows users to quickly see usage trends. [One-page flyers](#) and website content were developed and finalized for distribution. Specific target audiences were identified so that messaging would resonate and be impactful. Most importantly, over the last 12 months, the number of shared and managed service clients has continued to increase, with several districts now opting to purchase more than one shared service offering. This momentum is expected to continue into the early part of the 2024-2025 school year as additional clients come to fully realize the savings potential of AIU's suite of shared services.

Identify and meet with school districts that may benefit from the shared services model and determine the capacity needed to support the work.

In the 2023-2024 school year, AIU's shared services team continued to attract significant interest from Allegheny County school districts. Early in the year, the team engaged with several districts, before finalizing an agreement with the Riverview School District. The team recently completed the parallel payroll process to validate the accuracy and completeness of

all configuration tasks and is prepared for the July 1, 2024, go-live date. They have already begun communications with Riverview employees and will provide comprehensive training sessions to ensure all affected employees are proficient with the new payroll changes.

Additionally, after months of configuration and testing, the shared services team transitioned the Penn Hills School District to AIU's payroll services on January 1, 2024. Following this transition, AIU and Penn Hills concentrated on preparing the remaining back-office transactional processes for a July 1, 2024, launch. Over the past few months, the teams have configured the application, tested the setup, and trained district staff, ensuring the district's general ledger, accounts payable, and employee expenses are ready to go live on July 1, 2024.

In May, Joe Lucarelli was invited to the Western PAIU Executive Directors meeting to discuss AIU's shared services. The discussion focused on the work the AIU has accomplished and how other Intermediate Units could utilize AIU's experiences to implement similar shared services in counties beyond Allegheny County.

Strategic Goal #5: Influence and advocate for equitable educational policies, practices, and resources

Strategic Objective: Engage with AIU stakeholders, other entities, the community, and decision makers to positively impact public policy

Plan and begin a public education campaign that highlights positive things happening at the AIU and in member school districts.

Background

Work on this goal began with attempts to locate research that could inform the campaign. Just as this work commenced, we learned that the local research and strategy firm Campos had surveyed Pittsburgh-area residents in September 2023 about their opinions regarding K-12 public education. Key findings included:

- Residents tend to be more satisfied with their home school district: 55% were at least somewhat satisfied, only 24% were somewhat or very dissatisfied.
 - Residents were less satisfied with public education in Pennsylvania as a whole: 9% were very satisfied, compared with 23% very satisfied with their home district.
 - Among AIU member districts, only 18% were at least somewhat dissatisfied with their home district.
 - Those with household incomes of \$100,000 or more tended to be more satisfied with their home district than those with lower incomes.
- Dissatisfaction with K-12 education was higher among those who do not have school-age children: 48% were at least somewhat satisfied, compared with 78% among parents of school-age children.
 - Parents and nonparents were about equally dissatisfied with education in Pennsylvania as a whole.
- When asked to identify the three most important issues facing K-12 public education in Pennsylvania, residents responded:
 1. Academic quality (57%)
 2. Student safety (50%)
 3. Teacher retention/staffing shortages (36%)
 4. Disparities in funding/quality among districts/schools (34%)
 5. Student mental health (29%)
- Residents with household incomes below \$50,000 most often selected student safety as a top issue.
- Nonwhite residents most often selected funding/quality disparities as a top issue.
- Parents of school-age children most often selected student mental health as a top issue.

- Nearly a majority of residents (46%) would advise young people that vocational/technical training is the most valuable career path.

Nature of campaign

Based on these findings, we identified the goals of our planned campaign as:

- Raising awareness of positive aspects of public education
- Improving perception of public education
- Explaining why public education is important
- Creating a foundation and more favorable environment for policy “asks”

Our audiences will be:

- Parents/guardians, grandparents
- Taxpayers
- Policymakers
- Prospective school employees
- Other stakeholders, such as foundations

The campaign will emphasize:

- Areas where public education excels relative to other educational options
- Areas of concern to stakeholders
 - Academic achievement
 - Student mental health
 - Safety and security
 - Career and technical education
- Expertise and professionalism of staff
- Breadth of offerings, including extracurricular activities
- Broad representation of districts in terms of geography and socioeconomic status
- Unique and significant activities – not just “feel good” stories

Process

The campaign will leverage existing AIU communication channels, including publications and social media. Social media will be emphasized as a way of expanding audiences in a cost-effective manner. The campaign will tentatively be titled “AIU Gold Stars: Success Stories from Allegheny County Public Schools” and will have a logo consistent with AIU branding standards. “#AIUGoldStars” will be used as a hashtag on social media.

A standing feature will be established in all AIU publications – Update, Spotlight, Managers’ Notes, Connections – to highlight content. All content will be collected on a blog on the AIU public website. Search engine optimization will be used to try to reach individuals searching for information about public education in Allegheny County. Districts will push content to us; we will also pull content from districts. Districts may contribute items by emailing marcom@aiu3.net, or through hashtagging. Marcom staff will be assigned to monitor social

media, websites and publications of all 42 AIU member districts as well as career and technical schools for content that should be included in the campaign. The campaign will be promoted at Superintendents' Advisory Council and Public Relations Role-Alike meetings, among other venues. Marcom will "pitch" selected stories to the media on behalf of districts that do not have media relations capacity. Opportunities for grant funding for paid media will be explored.

Next steps

We determined that the optimal time to launch this campaign is in connection with the start of the 2024-2025 school year. Implementation of the campaign is proposed as a strategic goal for the upcoming year.

Strategic Objective: Build resources that will support and advance policy efforts.

Identify advocacy ambassadors in each AIU division to assist with forming and implementing advocacy strategies.

First, we defined the functions of the advocacy ambassador:

Continuously:

- Monitor developments in Pre-K-12 education policy at the local, state and national levels

Monthly:

- Review written legislative updates

As needed:

- Participate in internal meetings and/or asynchronous forums to develop effective advocacy techniques and messaging regarding AIU-designated advocacy issues
- Contact legislators and other policymakers to express support for AIU advocacy issues
- Engage other education stakeholders regarding AIU advocacy issues
- Attend meetings, site visits and other events with policymakers

With these functions in mind, volunteers were sought from among Act 93 administrators, specifically from the subset who have participated in the Pennsylvania Association of Intermediate Units' Aspiring Leaders program in recent years. The advocacy ambassador role may be opened to other types of employees in the future as the initiative evolves.

The advocacy ambassadors, by division and department, are:

Internal Services

- Sean Hoover, Data Services Manager – Technology Services
- Michael Jones, Director, Diversity, Equity and Inclusion – Administration
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Early Childhood, Family and Community Services

- Licia Lentz, Program Director – Alternative Education Program

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Teaching and Learning

- Shelly Burr, Coordinator – Training and Consultation
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- Brian Stamford, Program Director – Accountability & Innovative Practices

Strategic Goal #6: Communicate and promote programs and services with all stakeholders

Strategic Objective: Create a robust and comprehensive communications plan for the organization

Conduct a data ecosystem audit of critical applications, data management and reporting tools, and internal information warehousing sites and propose recommendations for improvement.

Overview

The AIU Digital Ecosystem Audit set out to identify the AIU's applications, data management and reporting tools and internal information warehousing sites, and the interrelationships among them, and to propose [recommendations](#) for improvement. The project ran through spring of 2024 and entailed focus-group conversations with internal departments and teams within each of the four AIU divisions, followed by a full cataloging of data systems, data integrations, and process needs identified along the way. Key findings and recommendations are shared below and are explored in further detail in the full report.

Full report can be found at: [AIU Digital Ecosystem Audit \(aiutechnologyassets.blob.core.windows.net\)](https://aiutechnologyassets.blob.core.windows.net)

Methodology

The project team adopted the following workflow for information collection and analysis:

1. **Internal Information Collection:** Technology Services staff conducted an internal review of known systems, integrations, and data flows. Because this department manages or supports a large proportion of AIU systems, beginning the ecosystem cataloging process here provided a strong foundation and context for more focused conversations in Phase 2.
2. **Focus Groups:** Team-specific interviews were then completed with staff across each division to understand data system usage, needs, and reporting processes. A general interview outline was used to ensure consistent information gathering across program teams—this included questions about each team's scope of systems, integrations, pain points, access and ownership, reporting obligations, and general data needs.
3. **Data Ecosystem Documentation:** The project team cataloged all data systems indicated through focus group conversations using a relational database system (see report appendices), helping to structure information about the relationships between systems, allowing analysis of strengths and gaps in system capabilities, and laying the groundwork for future data documentation at a more granular level.
4. **Early Phase Projects:** Many staff teams described, during focus group interviews, low-lift/high-urgency projects that could improve operations in the short term. The

project team began or completed several of these projects while conducting the Data Ecosystem Audit to ensure that documentation of the problems to be solved did not stand in the way of progress towards a solution.

5. **Reporting & Presentation:** Initial findings were reviewed with the Executive Leadership Team (ELT) on April 2nd, 2024. ELT members shared reflections on the findings, recommended additional staff teams to interview, and discussed the impacts of high-level recommendations such as centralized data management. Resulting follow-up work and drafting of this executive summary and its companion report sections was completed in April and May 2024.
6. **Recommendation Implementation:** The most important phase of this project is the work that follows: ongoing efforts to implement the recommendations put forth at the staff team, division, and organizational levels.

Key Findings

1. **The AIU Data Ecosystem is large, varied, and complex, with at least 203 applications/systems in use.** The natural organizational structure of an Intermediate Unit, with a large number of small teams serving specialized purposes (compared, for example, to a school district, with a smaller number of comparatively larger teams serving more interrelated purposes), results in a correspondingly vast network of application systems, often procured in isolation and specialized for each team's needs. This data ecosystem composition presents unique challenges in terms of interoperability, security, application support, and analytical capability.
2. **Flagship systems (Oracle, Entra ID) have enabled significant interoperability in core AIU systems.** Despite the ecosystem complexity indicated above, recent system implementations such as Oracle Fusion, ClassLink (both the Launchpad user portal and the OneSync rostering and automation platform), and Microsoft Azure and M365 resources (such as Entra ID and SharePoint) have greatly increased the number of connections between systems—an improvement in both operational efficiency and cybersecurity. For a specific example, Oracle Fusion has existing data connections to **32** other systems (24 of which are automated, while 8 involve manual uploads), greatly reducing the staff time required to manage information exchange across these connections.
3. **Many data resources and processes are replicated across teams, often working independently of one another.** While each AIU team serves a specialized purpose, many teams gather similar data resources—for example, student demographic information, program participation, and enrollment details—sometimes even on behalf of the same students from the same districts. There will always be certain data collection and reporting needs unique to each team; however, efforts to consolidate data collection, validation, storage, and reporting processes can greatly improve operational efficiency, returning staff time to the daily program implementation work that serves AIU learners.
4. **Manual data entry and manual data integrations represent the most common pain point across teams.** This finding applies across team functions—some teams

indicated bottlenecks in data collection and management processes, wherein the same information is requested multiple times or key-entered separately into multiple internal systems; other teams identified similar challenges with reporting portals, wherein the lack of bulk upload processes forces staff to double-enter records in AIU source systems and state or federal reporting portals (see following item).

5. (State and federal) **Reporting obligations dictate most teams' data ecosystems and practices.** This is particularly true for homegrown and custom-built systems, as their impacts extend from data collection (“we ask users for this data because we report on it”) to data management (“we use this storage option to accommodate regular program audits”) to data-out mechanisms (“we developed these queries and reports to pre-check our data submissions”). This is not a negative disposition, per se; rather, it helps to explain the driving force behind current system architectures.

Recommendations

The Data Ecosystem Audit’s resulting recommendations fall generally into three “parent recommendation” categories:

1. **[Build toward centralization, standardization, and interoperability of data resources.](#)**

This focus area recommends approaches to standardize and centralize data resources where possible in order to (A) enable holistic analysis of organizational data, (B) improve efficiency and effectiveness of data processes across teams, and (C) empower shared use of both data resources and technical resources across the organization in order to better serve AIU students, families, and districts.

2. **[Implement organization-wide data governance structures.](#)**

Many teams identified a need for improved documentation, data management, training, access controls, or process management—all of which fall under the larger umbrella of “data governance.” This focus area recommends establishment of AIU Data Governance operations and proposes several specific recommendations that would naturally be addressed by a data governance committee.

3. **[Advocate for more streamlined data reporting solutions.](#)**

While this focus area encompasses the fewest sub-recommendations, it represents perhaps the largest pain point described by staff in all four AIU divisions: compliance and accountability reporting processes. These swallow considerable staff time, which must be diverted from more direct-service work and often involves tedious or inefficient data entry (sometimes double-entry) better spent in service to learners. Data reporting is very important for accountability and transparency; this recommendation proposes advocacy for more efficient and effective data collection and reporting processes (typically for state-level reporting) in order to improve the reliability of reported data and to return valuable staff time to program teams.

Strategic Objective: Enhance communication efforts with external stakeholders

Conduct a comprehensive evaluation of Customer Relationship Management systems, including analysis of features, functionalities, costs, compatibility and sustainability.

Recommendation for CRM Adoption

As part of our ongoing efforts to enhance operational efficiency and stakeholder engagement within the AIU, we strongly recommend the selection, adoption, and pilot testing of a Customer Relationship Management (CRM) application. This strategic initiative is aligned with our goal to improve communication and service delivery across all AIU departments and programs.

Findings from Staff Survey: Our survey has highlighted significant interactions with a diverse range of external and internal customers, including school districts, individual schools, educational programs, and administrative teams. Staff reports managing relationships with several hundred entities regularly, underscoring the need for a robust system to streamline these interactions.

Benefits of CRM Implementation:

1. **Enhanced Data Management:** A CRM system will centralize and organize customer data, ensuring all team members have access to up-to-date information. This is crucial for maintaining consistency in our communications and service delivery.
2. **Improved Communication:** By providing tools for effective communication, a CRM will facilitate better interaction among internal teams and with external stakeholders.
3. **Efficiency in Operations:** Automating routine tasks and consolidating customer interactions in a single platform will save time and reduce errors, allowing staff to focus more on strategic tasks.
4. **Data-Driven Decision Making:** The CRM will enable us to gather and analyze data on customer interactions, providing insights that can guide future strategies and improvements.

Key Features of CRM Platforms:

- **Centralized External Stakeholder Contact Management:** A unified database for managing all external stakeholder contacts and tracking all interactions.
- **Lead-Quote-Contract Lifecycle Management:** Streamlined processes for managing the entire lifecycle from lead generation to quoting and contract management.
- **Marketing and Landing Pages:** Tools for creating and managing marketing campaigns and landing pages to track engagement and conversions and capturing leads.

Budgetary Considerations for CRM Implementation: In evaluating potential CRM solutions, it is crucial to consider the budgetary impact, especially concerning the licensing structure and maintenance costs associated with each option. We need to be aware of costs, limiting

licensing only to active users, and negotiating educational discounts. The pricing for HubSpot, though initially higher than anticipated, could potentially be negotiated down. Nutshell offers a more budget-friendly alternative at approximately \$16 per user per month. Microsoft Dynamics, while potentially offering educational discounts, may entail higher maintenance costs.

Issue an RFP in Summer 2024: To maximize the potential of our CRM adoption, we will develop and post an RFP to solicit detailed proposals from leading CRM vendors. This approach will allow us to assess and compare the functionalities, scalability, cost-effectiveness, and integration capabilities of various systems, ensuring we select the best fit for our organization's unique needs.

Targeted Vendors for RFP:

- **HubSpot, SuiteCRM, Microsoft Dynamics, FreshSales, Salesforce, Blackbaud, Nutshell:** Each offers distinct advantages in usability, cost-effectiveness, and specialized functionality suited to educational and non-profit environments.

Implementation Strategy:

1. **Pilot Testing:** Select a CRM tool based on identified needs and pilot it within one department to gauge its effectiveness.
2. **Staff Training:** Implement comprehensive training programs to ensure all users are proficient in using the new system.
3. **Evaluation and Expansion:** Evaluate the outcomes after a successful pilot phase and consider a broader rollout across AIU.

The implementation of a CRM system is expected to significantly contribute to our strategic objectives, enhancing our operational capabilities and improving the quality of our interactions with all stakeholders.

Plan for the launch of a new AIU website

Throughout the 2023-24 school year, the AIU undertook several steps to achieve the goal of preparing for a new public website. A variety of factors converged approximately 12 months ago to necessitate the redesign of aiu3.net:

- The AIU's current contract with Final Site, the web platform provider, was to expire on July 1, 2024.
- Final Site was discontinuing Web Community Manager, AIU's platform, and forcing all customers to a new, and in our opinion inferior, product. This move would require staff training and several workflow changes.

- The AIU’s MarCom Department has grown significantly since the launch of the Blackboard/Final Site supported website and has expanded its expertise in content curation and development. As a result, content workflows have been streamlined.
- The Final Site template, while satisfactory at the time of deployment, no longer met the agency’s needs; therefore, a site redesign would be required.

In the fall of 2023, the core team of employees from Technology Services as well as Marketing and Strategic Communication (MarCom) formed a working group to explore alternatives to the current public website. Almost immediately it was determined that both InSite, an employee-only intranet site, and SuperSite, a repository of information for district superintendents, would be moved to the AIU’s SharePoint platform. This decision greatly enhanced the number of options that the core team would have in choosing a website provider. It was also determined that an RFP process would be followed in the selection process.

In December 2023, an RFP document was finalized, posted and advertised. A total of five proposals were received. One proposal was eliminated because it did not meet the basic requirements outline in the RFP. The remaining four vendors were invited to present their ideas to a joint group of Technology and MarCom representatives. Members of other divisions were invited to and did indeed attend the vendor presentations. Five*Star was the successful bidder, and a contract was approved in February 2024.

In early March, members of Technology and MarCom began meeting with Five*Star developers to learn more about the needs of the AIU. The discovery phase of the project was completed in late April. It has been determined that the new site will be built as a WordPress site, which will give the agency the maximum flexibility in functionality and design. The site will be built in May and June. A cutover to the new platform is expected in July.

