TO: Board of Directors

FROM: George Russell, Superintendent of Schools

RE: District Values, Goals and Priorities

Work Session: Establish or affirm proposed district values, goals and priorities for the superintendent to use as parameters in developing draft scenarios for achieving the board’s goal of a sustainable budget.

At the work session the board will discuss whether to:
   a) modify or reject any or all of these proposed goals and priorities;
   b) develop a new or different set of goals and priorities for developing sustainable budget recommendations; or
   c) determine that it is not necessary to establish prioritized values, goals and priorities and direct the superintendent to work within the existing beliefs and values, goals and principles to develop recommended strategy scenarios.

Background:

Sustainable Budget

The Board has established a Board Goal to “provide prudent stewardship of district resources to best support student success, educational equity and choice”. The goal defined what it means by sustainable budget in its key result. That is, that by 2012-13, the district will implement a sustainable budget that “maintains reserves at or above board targets, minimizes the use of one-time funds for ongoing expenses, and optimizes the use of short-term resources to improve student achievement and increase operational efficiency while reducing long-term capital needs.” To meet this goal, the superintendent established a goal for 2010-11 that provides that the superintendent will “develop strategy options for achieving the board’s sustainable budget goal and present a proposal to the Board and Budget Committee by February 2011.”

Mission, Values and Beliefs

The district has established as its mission statement the following:
Investing in Students, Creating the Future -
• Do what’s best for all 4J students
• Continue to learn and grow
• Respect and care about each other

In order to meet the District Mission Statement, the Board has adopted a statement of guiding beliefs and values.

The values and belief statement helps drive the mission of the school district. The Board has also established goals and principles that help it focus on providing a strong instructional program and incorporating the necessary support and resources to achieve academic success for all students. The problem is that the optimal instructional program to meet those goals cannot be attained, nor can the current program be sustained within the current fiscal climate.
The district is, and will be for the short-term future, in a continuing decline of resources that affects its capacity to do all of the things we believe is good for kids. We are faced with the prospect of making some really tough choices over the next few years. While our values, goals and principles are useful in helping us envision where we want to be, they are not very instructive to us as we try to set priorities for the kinds of strategies that can actually get us to a sustainable budget. The reality is that we just can’t afford to do all the important things we want to do. We will have to make some trade-offs.

Discussion:

To help the superintendent have a better understanding of what is truly most important, and I recognize that every thing we are currently doing is important to somebody, I am proposing that the Board endorse a prioritized version of values and goals specifically to be used in developing sustainable budget scenarios. Following the adage that “if everything is a priority, then nothing is a priority”, what I’m asking for is some prioritization that I can use as parameters within which to develop conceptual scenarios first, and then ultimately more detailed and specific scenarios for attaining a sustainable budget.

At the September 15 board meeting the Board will adopt and reaffirm its beliefs and values statement. These are the belief statements and values that will sustain the district as it moves forward to accomplish its mission. These beliefs and value statements are not ones that can be sacrificed on the altar of financial expediency, but it is important also to recognize that we can hold on to those beliefs and values as foundational, aspirational and visionary, while at the same time grounding our short-term actions through the prioritization of our goals and activities. As a part of the Shaping 4J’s Future, the Board captured many of its previously expressed beliefs and values in what it has come to call Core Values. These core values are defined as Excellence, Equity, and Choice. The working definitions of these terms are attached along with the guiding principles and goals developed as a part of that process. Attachment: Shaping 4J Goals and Principles.

Thought Leaders

The Community Thought Leaders (CTL) recognized that the “new normal” will require that the ways in which we currently deliver services cannot continue to be supported in this new environment. A number of key themes and messages emerged from their work. See attached CTL report. In their report, the CTL also identified a number of potential short and long-term strategies they believed should be considered as we seek ways to achieve our values, goals and priorities within the resources we have available. They identified three strategies which they felt were the most important and promising strategies for the district to pursue.

The District Thought Leaders also considered the same issues as the Community Thought Leaders but strove to start with a “blank slate” for their discussion. The District Thought Leaders group cautioned that the strategy ideas presented in their report require much deeper thought and exploration and recognized that some ideas may prove not to be feasible. See attached District Thought Leaders report. At the same time, the group saw opportunities to make changes that will increase efficiency and support our schools as we strive to provide effective and engaging student learning opportunities, while also bringing the district’s budget into balance. While there were some similarities in strategy ideas, and some overlap in terms of thinking, there were some significant distinctions regarding approach and prioritization of actions. The DTL report includes a summary of the strategies they suggested. Attachment: DTL Report

Revised 9/15/10
Parameters

Taken together with the Board’s core values and board goals and principles, there starts to emerge from the beliefs and values statement, Thought Leaders and Shaping 4J reports some level of symmetry that at least can be explored. Based on this convergence of symmetrical parts and ideas, I have attempted to develop some sense of priorities around what matters most within the context of our broader-based beliefs and values, goals and principles, and priorities and strategies. To move us toward that end, I am suggesting identifying some parameters within which we can develop investment, reinvestment, continued investment or disinvestment strategies to help us align our priorities with our means.

As a way to get you thinking about the challenge at hand, I have proposed some questions below that may help the board as they consider the enormity of the task ahead.

- As a district what must we do?
- What should we be doing that we’re not doing?
- What are the things we are doing but don’t have to do? What can we no longer do?
- Is there a trump card? If so, what is it and how will it be used?

Values and Impact

One of the approaches I’ve suggested in the past is to think in terms of both value and impact. Value does not mean value in terms of dollars, but rather value in moving forward the goals consistent with the Board’s priorities. The highest value program or service would be one that is value-added and highly correlative with the Board’s hierarchy of values and has the greatest impact on student achievement. That is, one that would fall in the High Value/High Impact quadrant of the proposed Value to Impact grid. The Board’s direction on its values and priorities will be useful in helping staff assess the value and importance of programs, services or initiatives, and allow for more reasoned debate about the relative worth or value of a program or service and how it correlates with the board’s hierarchy of values, goals and priorities.

By impact, I don’t mean financial impact, but rather the effects/results of the program, service, initiative or activity as it relates to Board values and goals. Thus, one might look at impact in a systemic way. That is, does it have district-wide effects, school-wide effects, classroom effects, or impact on individual or groups of students? When we think about the instructional core as a focus on teaching and learning, we might look at impact on students and what happens in the instructional core as the highest priority. A High Impact program or service would be of higher priority than one that had a lesser impact in relation to the specific value or goal.
Value to Impact Grid

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<thead>
<tr>
<th>Value</th>
<th>Impact</th>
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<tbody>
<tr>
<td>1</td>
<td>Highest Priority</td>
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<td>HIGH VALUE</td>
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<td>HIGH IMPACT</td>
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<tr>
<td>2</td>
<td>High Priority</td>
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<td>HIGH VALUE</td>
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<td>LOW IMPACT</td>
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<td>3</td>
<td>Moderate Priority</td>
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<td>HIGH IMPACT</td>
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<td>4</td>
<td>Lowest Priority</td>
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<td>LOW VALUE</td>
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Hierarchy of Values, Goals and Priorities

The superintendent is requesting the Board to consider establishing a Hierarchy of Values, Goals and Priorities with the associated beliefs and values to be used by the superintendent in priority order for developing scenario options for a sustainable budget. The Hierarchy of Values and Priorities is suggested below. The work session is intended to allow for discussion among board members of the proposed hierarchy and determine where it agrees or disagrees with the superintendent’s suggested hierarchy, and to make any changes it sees fit.

My suggested hierarchy is below in priority order:

1. **Value/Belief**: Students, Learning, Excellence, Equity  
   **Goal(s)**: Student Achievement for All and Close Achievement Gaps  
   **Priorities**: 21st Century Skills; High School Graduation; Literacy; Achievement Gaps (including Special Education and English Language Learners)  
   **Strategies**: High Impact / High Value

2. **Value/Belief**: Sufficient Resources and program offerings to provide quality programs in all schools  
   **Goal(s)**: well-rounded education that includes art, music, physical education, technology and media  
   **Priorities**: early intervention; graduation requirements; neighborhood schools; school size; RTI; PBS  
   **Strategies**: High Value / High Impact

3. **Value/Belief**: Support for Teaching and Learning  
   **Goal(s)**: instructional delivery redesign; central services support; valued staff;  
   **Priorities**: staffing ratio; class size; professional development; data and progress monitoring  
   **Strategies**: High Value / High Impact; High Value / Low Impact

Revised 9/15/10
4. **Value/Belief:** Administrative and Operational Efficiency / Effectiveness  
   **Goal(s):** sustainable budget; systemic/centralization/shared or consolidated services  
   **Priorities:** school consolidation; employee effectiveness/accountability systems; property management; revenue and reserve strategies  
   **Strategies:** High Value / High Impact; High Value / Low Impact; High Impact / Low Value

5. **Value/Belief:** Public, Community and Stakeholder support and engagement  
   **Goal (s):** parent, family and community engagement; intergovernmental relations; community partnerships  
   **Priorities:** Parental Choice; enrollment and boundary management; alternative schools  
   **Strategies:** High Value / Low Impact; High Impact / Low Value