

ALLEGHENY INTERMEDIATE UNIT



# STRATEGIC PLAN

## 2021–2026

Progress Update – June 2023



## ABOUT THE AIU

The Allegheny Intermediate Unit, also known as the AIU, provides an array of high-quality, cost-effective educational services for students of all ages in Allegheny County. Serving students and educators in all 42 suburban school districts and in non-public schools, the AIU also operates 10 family centers and three schools for exceptional children.

Located just outside Pittsburgh, the AIU is one of the largest of the 29 intermediate units in Pennsylvania and is led by a 13-member board. The AIU receives funding through fees for service and a variety of public and private grants.



## EXECUTIVE SUMMARY

**AT THE BEGINNING OF THE 2020-2021 SCHOOL YEAR**, the AIU's Board of Directors and Executive Leadership Team determined that a new strategic plan was needed to continue the organization's growth and its tradition of providing premier educational services. The administration developed an internal facilitation process and identified key stakeholder groups that would collaborate to create a comprehensive plan.

In early 2021, 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. The committee also developed strategic goals and objectives that will guide the organization's activities over the next five years.

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 as well as direction for board members, employees, and external stakeholders.

I want to thank everyone whose voice helped shape this strategic plan. In particular, I am grateful to the six members of the facilitation team for their tireless efforts to shepherd this process, and to the 26 members of the Strategic Planning Committee who represented a variety of stakeholders and came together each month to provide a unique perspective on this effort. Thank you for your commitment to the work of the AIU as we advocate and advance equitable opportunities for every learner!

Dr. Robert Scherrer  
*Executive Director*

## 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.*



**A STRATEGIC PLAN** is vital to an organization's success.

It establishes priorities, focuses resources, and ensures that stakeholders are working toward common goals. A strategic plan includes an organization's mission, vision, and belief statements, as well as key strategic goals. Effective strategic planning plays a pivotal role in an organization's growth and fosters innovation, communication, and long-term stability.

## STRATEGIC GOALS

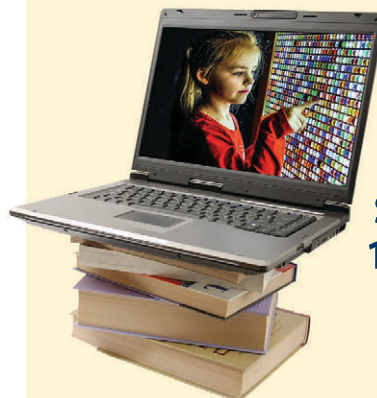
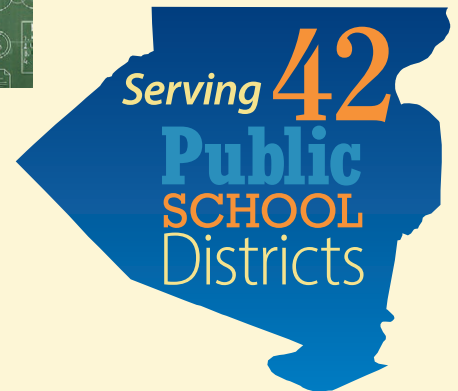
- 1 Attract, grow, and retain a high-quality and diverse workforce.
- 2 Embrace an innovative mindset throughout the organization and with our school partners.
- 3 Serve as a leader and connector for the region in educational best practices.
- 4 Provide a shared services model to help educational entities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

## AIU BY THE NUMBERS



**406**  
UNIQUE  
Locations

**10**  
FAMILY CENTERS  
serving children and adults



**STUDENTS  
ATTENDING  
SCHOOL  
DISTRICTS IN  
SERVICE AREA  
112,435\***

**130**  
Programs  
& Services

PROFESSIONAL  
STAFF SERVED  
**8,794\***

\*As of January 2023



## 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.

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We ensure programs and services are available, accessible, and **valuable** to our community.

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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.

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We champion education through meaningful teaching, learning, and development across life stages for all community members through **equitable** access to resources, relationships, and opportunities.

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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.

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We believe that demanding anything less than **excellence**, internally and externally, is sacrificing the potential that all learners possess, regardless of situation or circumstance.

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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.

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We model a culture of excellence, inspiring effective **leadership** that supports effective teachers, successful students, and a strong community.

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We are **responsive** to the needs of all learners and work to continuously refine and reform education to meet those needs.

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We honor our commitments and promote fairness, respect, honesty, integrity, transparency, and **trust** in all that we do.

## STRATEGIC PLANNING COMMITTEE

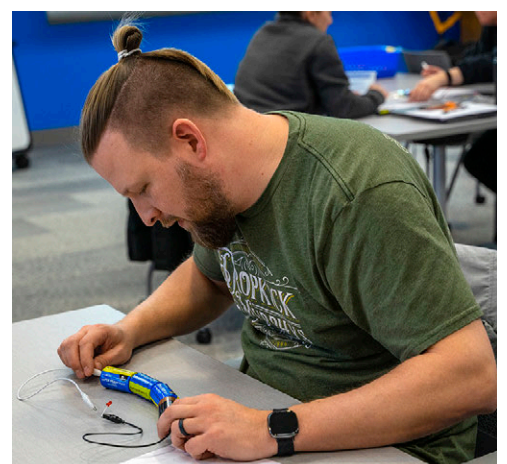
Thank you to everyone who contributed to the AIU's strategic planning process. Many employees, school district administrators, teachers, board members, and others provided valuable feedback and astute observations regarding the AIU's current programs and services.

### Strategic Planning Facilitation Team

Jeanette Casciato, Assistant Director, Head Start, AIU  
Dr. Laura Miller, Coordinator, Training & Consultation, AIU  
Tyler Samstag, Director, Instructional Innovation, AIU  
Dr. Robert Scherrer, Executive Director, AIU  
Matt Weber, Internal Auditor, AIU  
Brian Welles, Assistant Director, Special Education, AIU  
David Zimmerman, Assistant Director, Human Resources, AIU

### Strategic Planning Committee Members

Jon Amelio, Chief Technology Officer, AIU (*former*)  
Jamie Baxter, Executive Director, Allies for Children  
Gregg Behr, Executive Director, Grable Foundation  
Sarah Campbell, Admin. Support, AIU  
Dawn Clark, Special Education Liaison, AIU  
Jennifer Coles, Special Education Teacher, AIU  
Jeanine Esch, Program Director, Hearing Vision & Communication Access, AIU  
Dr. Gretchen Givens Generett, Dean, School of Education, Duquesne University  
Jamie Glasser, President, Woodland Hills SD, Board Secretary, AIU (*former*)  
Dr. Caroline Johns, Superintendent, Northgate School District  
Michael Jones, Director, Office of Diversity, Equity & Inclusion, AIU  
Erin Koebel, Director, Human Resources & Labor Relations, AIU  
Dr. Leanna Lawson, Program Director, Training & Consultation, AIU  
Dr. Catherine Lobaugh, Assistant Executive Director, ECFCs, AIU (*former*)  
Joseph Lucarelli, Chief Finance & Operations Officer, AIU  
Sarah McCluan, Assistant Director, Marketing & Strategic Communication, AIU  
Shannon McGee, Program Director, Early Childhood Education Services, AIU  
Samantha Murphy, Resource Services Manager/Educ. Liaison, ACDHS  
Dr. James Palmiero, Assistant Executive Director, Special Education & Pupil Services, AIU  
David Schaap, Board Member, Brentwood School District, Board President, AIU  
Dr. Robert Scherrer, Executive Director, AIU  
Chardae Seligsohn, Parent  
Joseph Shaulis, Esq., General Counsel, AIU  
Aaron Skrbin, Director Safety & Security, AIU  
Dr. Brian Stamford, Program Director, Accountability & Innovative Practices, AIU  
Lindsey Williams, PA State Senator, 38th Senatorial District



# AIU STRATEGIC GOALS AND OBJECTIVES

The strategic planning process led to six organizational goals that will guide the work of the AIU from 2021–2026. Strategic objectives were then developed to provide a supporting framework for the strategic goals and help achieve the established vision. The Strategic Planning Committee then identified SMART goals for the first few years of the five-year plan. SMART goals are specific, measurable, achievable, relevant, and time bound. They tie directly to the strategic objectives and highlight specific actions that are typically accomplished within a year. SMART goals for the later years of the plan will be identified based upon the work that is initially accomplished in the first few years.

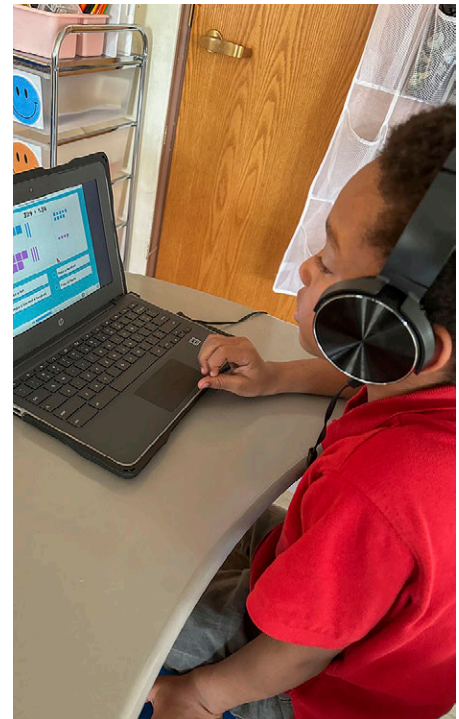


*Indicates a goal or objective that has been achieved.*

<b>Goal 1: Attract, grow, and retain a high-quality and diverse workforce</b>				
<b>Strategic Objectives</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
<b>Create a talent development and succession planning strategy</b>				
▪ Research, plan, and implement quality mentoring programs.	✓			
▪ Create a succession plan for every leadership position that builds the capacity of rising leaders.				•
▪ Develop career laddering which includes job families/position summaries, qualifications, etc.		✓		
<b>Create an effective talent acquisition strategy</b>				
▪ Communicate internally to stakeholders regarding the organization’s talent acquisition strategy.	✓			
▪ Develop a baseline strategy to include recruiting sources.	✓			
▪ Develop a process to track recruitment data metrics.	✓			
▪ Identify language in collective bargaining agreements and AIU policies that may be encouraging and discouraging acquisition of talent.		✓		
▪ Conduct a competitive market analysis and analyze the total rewards package for AIU employees.			•	
<b>Create effective retention strategies</b>				
▪ Create an organizational staff health and wellness initiative to create a culture of self-care.	✓			
▪ Develop a comprehensive rewards and recognition system for future implementation.	✓			
▪ Develop and conduct exit surveys with every employee who voluntarily resigns or retires from the organization.	✓			
▪ Develop and implement onboarding modules and schedules to support and acclimate new employees from hire and through the life cycle of the employee.	✓			
▪ Adopt and implement an employee engagement survey.		✓		
▪ Develop a system of effectively assessing data collected from exit interviews.		✓		
▪ Identify and research organizations that are recognized for their positive retention of employees.		✓		
▪ Launch a comprehensive rewards and recognition system.		✓		
▪ Research and develop a comprehensive leadership program for staff members who serve in leadership roles.		✓		
▪ Implement an Appreciation and Recognition Toolkit with all staff members.			•	
▪ Develop or update job descriptions for all positions.			•	
▪ 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

Strategic Objectives	2022	2023	2024	2025
<b>Define, model, and promote what innovation looks like across the organization</b>				
<ul style="list-style-type: none"> <li>Assemble an innovation team to create a plan to define and measure innovation across the organization.</li> </ul>	✓			
<ul style="list-style-type: none"> <li>Identify areas where there is a need or opportunity for innovation.</li> </ul>		✓		
<ul style="list-style-type: none"> <li>Expand key internal and external systems (i.e. Oracle Fusion, PA Educator, Service Desk) to promote efficiencies and effectiveness.</li> </ul>		✓		
<ul style="list-style-type: none"> <li>Highlight and communicate organizational innovations through monthly newsletters, blogs, and social media.</li> </ul>			●	
<b>Create internal projects and opportunities dedicated explicitly to innovation within AIU programs and school partners</b>				
<ul style="list-style-type: none"> <li>Identify and explore platforms for the organization to use that support collaboration.</li> </ul>	✓			
<ul style="list-style-type: none"> <li>Analyze the feasibility of implementing a model early childhood classroom at the AIU Central Office.</li> </ul>			●	
<ul style="list-style-type: none"> <li>Explore and implement programs that expand the educator pipeline (teachers, nurses, paraprofessionals, social workers, etc.).</li> </ul>			●	
<b>Elevate organizational innovation to serve as a model regionally, nationally, and internationally</b>				
<ul style="list-style-type: none"> <li>Utilize social media tools to schedule posts about current research on a timely basis.</li> </ul>	✓			



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

Strategic Objectives	2022	2023	2024	2025
<b>Understand the needs of our community</b>				
<ul style="list-style-type: none"> <li>Develop a data governance committee for the AIU.</li> </ul>	✓			
<ul style="list-style-type: none"> <li>Develop a tool that identifies what data is currently available and what data the AIU needs to collect.</li> </ul>		✓		
<ul style="list-style-type: none"> <li>Disseminate key research and data to internal and external stakeholders in the region.</li> </ul>			•	
<b>Work alongside/in support of Local Education Agencies (LEAs) as they enhance educational programming</b>				
<ul style="list-style-type: none"> <li>Review the tuition model and long-term facilities plans for the three AIU-operated special education schools.</li> </ul>			•	
<b>Develop a true mindset of partnership, connection, and shared leadership</b>				
<ul style="list-style-type: none"> <li>Determine the feasibility of hiring a position to identify the self-interest of the partner, AIU, and districts and work to connect them.</li> </ul>	✓			
<ul style="list-style-type: none"> <li>Develop partnerships with five new entities to grow opportunities at the AIU.</li> </ul>	✓			
<ul style="list-style-type: none"> <li>Create a committee focused on obtaining feedback from all customers.</li> </ul>		✓		

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

Strategic Objectives	2022	2023	2024	2025
<b>Understand the needs of our community</b>				
<ul style="list-style-type: none"> <li>Collect ongoing information from superintendents and business managers via multiple data points to explore opportunities to understand the needs of the districts.</li> </ul>	✓			
<ul style="list-style-type: none"> <li>Create a plan and an organizational structure to be shared with stakeholders that explains the AIU's long term vision for shared services and short term plan.</li> </ul>	✓			
<ul style="list-style-type: none"> <li>Define and clarify what constitutes a shared service at AIU and share this information with stakeholders.</li> </ul>	✓			
<b>Communicate to stakeholders shared services offerings</b>				
<ul style="list-style-type: none"> <li>Create a marketing plan that promotes shared services offerings, benefits, and lessons learned</li> </ul>		✓		
<ul style="list-style-type: none"> <li>Develop shared services marketing materials that highlight available offerings.</li> </ul>			•	
<ul style="list-style-type: none"> <li>Identify and meet with school districts that may benefit from the shared services model and determine the capacity needed to support the work.</li> </ul>			•	
<b>Advocate, strategize, and identify funding to help incentivize school entities to participate in shared services with the AIU</b>				
<ul style="list-style-type: none"> <li>Engage external resources to support implementation and start-up costs to expand shared services.</li> </ul>	✓			
<ul style="list-style-type: none"> <li>Identify and connect with a least one legislator from each party, representatives from the Pennsylvania Department of Education, and the Pennsylvania Association of School Business Officers to develop support for shared service initiatives.</li> </ul>	✓			



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

Strategic Objectives	2022	2023	2024	2025
<b>Engage with AIU stakeholders, other entities, the community, and decision makers to positively impact public policy</b>				
<ul style="list-style-type: none"> <li>Collaborate with identified entities to explore new partnerships and markets of potential influence.</li> </ul>	✓			
<ul style="list-style-type: none"> <li>Identify and develop a list of at least four entities that advocate and advance policies that benefit the education community in Allegheny County.</li> </ul>		✓		
<ul style="list-style-type: none"> <li>Create a strategy to annually increase interaction opportunities with local, state, and federal elected officials.</li> </ul>		✓		
<ul style="list-style-type: none"> <li>Develop a unique advocacy agenda that includes key stakeholders for a collective impact for the whole agency.</li> </ul>		✓		
<ul style="list-style-type: none"> <li>Utilize the stakeholder groups to share and gather feedback on the agency's advocacy agenda and mobilize them to influence policy makers.</li> </ul>				•
<ul style="list-style-type: none"> <li>Plan and begin a public education campaign that highlights positive things happening at the AIU and in member school districts.</li> </ul>			•	
<b>Build resources that will support and advance policy effort</b>				
<ul style="list-style-type: none"> <li>Increase AIU employee awareness of the key legislative/advocacy efforts and needs through regular communication including various electronic publications.</li> </ul>	✓			
<ul style="list-style-type: none"> <li>Identify advocacy ambassadors in each AIU division to assist with forming and implementing advocacy strategies.</li> </ul>			•	
<b>Grow internal capacity to assist with the expansion and understanding of key policy issues</b>				
<ul style="list-style-type: none"> <li>Determine the feasibility of engaging an individual to support the AIU public policy agenda.</li> </ul>	✓			



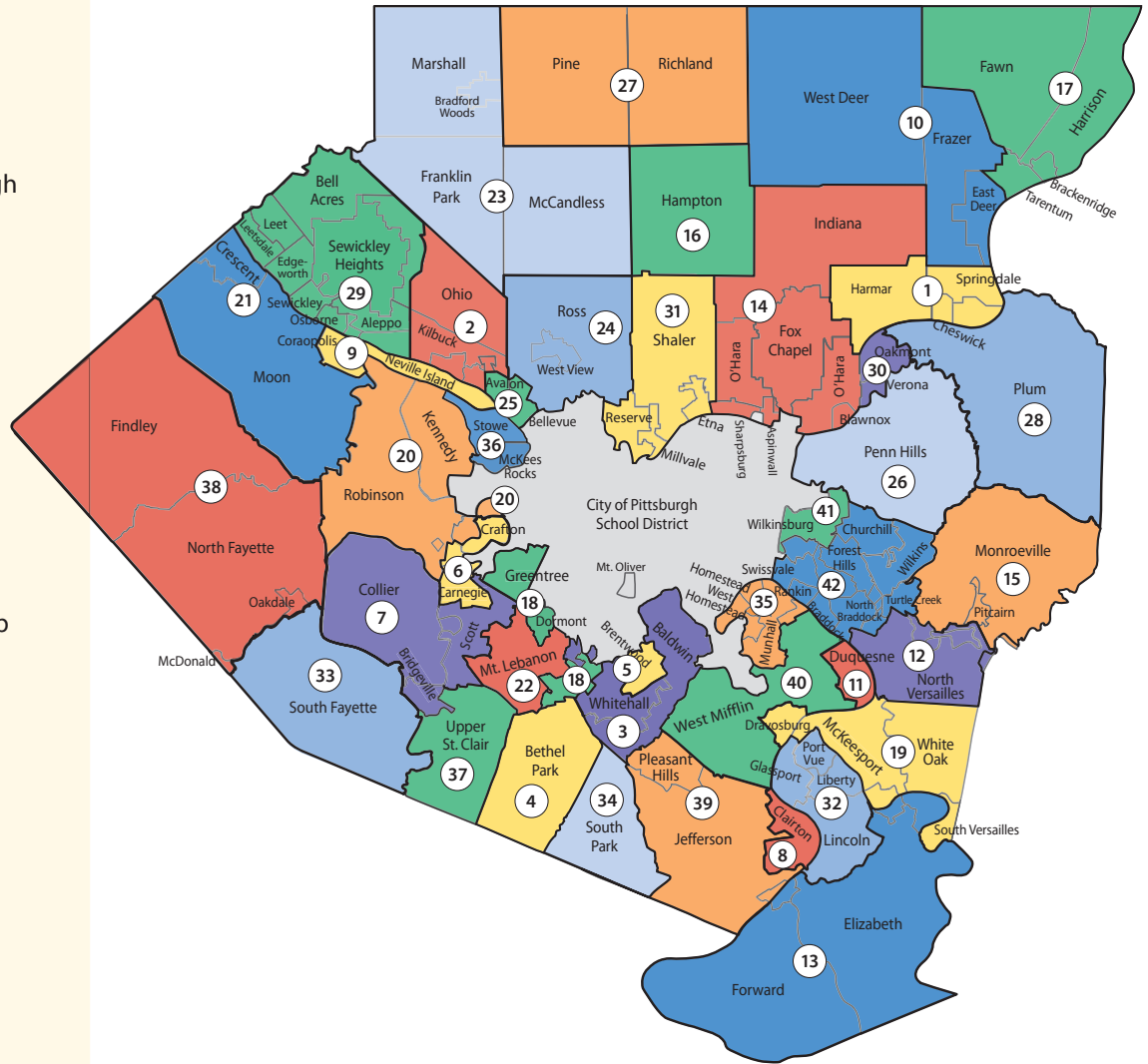
## Goal 6: Communicate and promote programs and services with all stakeholders

Strategic Objectives	2022	2023	2024	2025
<b>Create a robust and comprehensive communications plan for the organization</b>				
<ul style="list-style-type: none"> <li>Develop an organization-wide communication plan and re-evaluate and adjust annually.</li> </ul>	✓			
<ul style="list-style-type: none"> <li>Identify and assess current communication needs across the organization.</li> </ul>	✓			
<ul style="list-style-type: none"> <li>Create a committee to reevaluate, update, and enhance communications-related policies, procedures, systems, and practices to identify operational efficiencies and redundancies.</li> </ul>	✓			
<ul style="list-style-type: none"> <li>Conduct a data ecosystem audit of critical applications, data management and reporting tools, and internal information warehousing sites and propose recommendations for improvement.</li> </ul>			●	
<b>Enhance communication efforts with external stakeholders</b>				
<ul style="list-style-type: none"> <li>Create an individual communication plan for each strategic goal.</li> </ul>	✓			
<ul style="list-style-type: none"> <li>Develop a clear plan to increase external stakeholders' awareness and understanding of AIU programs.</li> </ul>	✓		●	
<ul style="list-style-type: none"> <li>Refresh and strengthen the AIU's branding and logo.</li> </ul>	✓			
<ul style="list-style-type: none"> <li>Develop communication plans for each programming division and internal services.</li> </ul>		✓		
<ul style="list-style-type: none"> <li>Identify a dedicated content creator to be assigned to each division to promote upcoming events and develop success stories that highlight the accomplishments of AIU staff and students.</li> </ul>		✓		
<ul style="list-style-type: none"> <li>Conduct a comprehensive evaluation of Customer Relationship Management systems, including analysis of features, functionalities, costs, compatibility and sustainability.</li> </ul>			●	
<ul style="list-style-type: none"> <li>Plan for the launch of a new AIU website.</li> </ul>			●	
<b>Strengthen communication efforts within each AIU division</b>				
<ul style="list-style-type: none"> <li>Develop a clear plan to increase employees' awareness and understanding of AIU programs.</li> </ul>				
<ul style="list-style-type: none"> <li>Develop a simple, comprehensive calendar approach that is regularly updated with upcoming events for each division.</li> </ul>				



# THE 42 SUBURBAN SCHOOL DISTRICTS OF ALLEGHENY COUNTY

1. Allegheny Valley
2. Avonworth
3. Baldwin-Whitehall
4. Bethel Park
5. Brentwood Borough
6. Carlynton
7. Chartiers Valley
8. Clairton City
9. Cornell
10. Deer Lakes
11. Duquesne City
12. East Allegheny
13. Elizabeth Forward
14. Fox Chapel Area
15. Gateway
16. Hampton Township
17. Highlands
18. Keystone Oaks
19. McKeesport Area
20. Montour
21. Moon Area
22. Mt. Lebanon
23. North Allegheny
24. North Hills
25. Northgate
26. Penn Hills
27. Pine-Richland
28. Plum Borough
29. Quaker Valley
30. Riverview
31. Shaler Area
32. South Allegheny
33. South Fayette Township
34. South Park
35. Steel Valley
36. Sto-Rox
37. Upper St. Clair
38. West Allegheny
39. West Jefferson Hills
40. West Mifflin Area
41. Wilkinsburg Borough
42. Woodland Hills



## Facts and Figures about the Allegheny Intermediate Unit

42	Suburban school districts served
112,435	Students attending school districts in our service area*
406	Unique locations served by AIU
1,188	Total number of AIU employees*
130	Programs and services offered
3	Schools for Exceptional Children
5	Career and Technology Centers

\* As of January 2023

## Allegheny County Demographic Information

730	Square Miles including City of Pittsburgh
1,213,570	Population including City of Pittsburgh (2021 U.S. Census Bureau)

# ALLEGHENY INTERMEDIATE UNIT



*Serving Every Learner*



475 East Waterfront Drive | Homestead, PA 15120  
412-394-5700 | [aiu3.net](http://aiu3.net)