

## **LANCASTER-LEBANON IU 13**

1020 New Holland Avenue

IU Comprehensive Plan | 2021 - 2024

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### **MISSION STATEMENT**

IU13 seeks to create and provide innovative services, supports, and solutions that positively impact all learners across our communities.

### **VISION STATEMENT**

Through a kind and inclusive culture, IU13 is a diverse team of passionate, curious people of character, dedicated to making a difference through #workworthdoing.

## **EDUCATIONAL VALUE STATEMENTS**

### **STUDENTS**

Students are at the heart of IU13's mission. We will continue to provide services that are designed to bring out the greatest potential of each learner, with a focus on individualized instruction developed in collaboration with families, school districts, and other key stakeholders.

### **STAFF (FORMALLY EDUCATORS)**

The staff at IU13 are dedicated to providing warm and inviting learning experiences that allow our learners to feel safe, supported, and encouraged to reach their full potential. Staff will constantly strive to grow their expertise and seek collaboration with families, community partners, and other staff.

### **ADMINISTRATION**

IU13 administrators are committed to promoting a culture that supports work worth doing. This will be done by carrying out the Keys to Our Culture: • Responsible stewardship • Kindness and Empathy • Gratitude • Intentional listening • Relentless pursuit of excellence • Imperfection • Collaboration • Innovation

### **LEA LEADERS**

IU13 recognizes the importance of close collaboration with its school district partners. Through these partnerships, IU13 will provide innovative services that are financially responsible, pedagogically sound, and designed to meet the needs of learners and districts.

### **PARENTS**

Parents are an important part of the success of IU13 students. Their continued support of student goals and objectives is critical to each student reaching their maximum potential.

**COMMUNITY**

IU13 will continue to engage with community partners to promote a spirit of collaboration and innovation.

**OTHER (OPTIONAL)**

## STEERING COMMITTEE

Name	Position	Building/Group
Dr. Brian Barnhart	Administrator	Lancaster-Lebanon Intermediate Unit 13
Dr. Joey Bertrand	Administrator	Lancaster-Lebanon Intermediate Unit 13
Sherry Zubeck	Administrator	Lancaster-Lebanon Intermediate Unit 13
Flip Steinour	Administrator	Lancaster-Lebanon Intermediate Unit 13
Gina Brillhart	Administrator	Lancaster-Lebanon Intermediate Unit 13
Tim Laubach	Administrator	Lancaster-Lebanon Intermediate Unit 13
Lauren Wise	Staff Member	Lancaster-Lebanon Intermediate Unit 13
Diane Donat	Staff Member	Lancaster-Lebanon Intermediate Unit 13
Pam Overmeyer	Staff Member	Lancaster-Lebanon Intermediate Unit 13
Jennifer Shmidheiser	Staff Member	Lancaster-Lebanon Intermediate Unit 13
Heather Brown	Staff Member	Lancaster-Lebanon Intermediate Unit 13
Angie Gornish	Staff Member	Lancaster-Lebanon Intermediate Unit 13
Cathy Hower	Staff Member	Lancaster-Lebanon Intermediate Unit 13

<b>Name</b>	<b>Position</b>	<b>Building/Group</b>
Tom Esposito	Staff Member	Lancaster-Lebanon Intermediate Unit 13
Matthew Witmer	Staff Member	Lancaster-Lebanon Intermediate Unit 13
Anna Ramos	Community Partner	Lancaster County Workforce Investment Board
Peter Caddrick	Community Partner	Case New Holland
Patricia Donley	Community Partner	Wellspan
Ina Hosszu	Parent	Parent
Deb Bierly	Community Partner	Lancaster-Lebanon Educational Foundation
Mike Landis	Board Member	Lancaster-Lebanon Intermediate Unit 13
Nikki Rivera	Board Member	Lancaster-Lebanon Intermediate Unit 13
Dr. Kristen Lewald	Administrator	Lancaster-Lebanon Intermediate Unit 13
Shannan Guthrie	Administrator	Lancaster-Lebanon Intermediate Unit 13
Ron Melleby	Board Member	Lancaster-Lebanon Intermediate Unit 13
Chris Cherny	Administrator	Lancaster-Lebanon Intermediate Unit 13
Sergio Anaya	Administrator	Lancaster-Lebanon Intermediate Unit 13
Janice Estabrook	Administrator	Lancaster-Lebanon Intermediate Unit 13

<b>Name</b>	<b>Position</b>	<b>Building/Group</b>
Corrine Wenger	Staff Member	Lancaster-Lebanon Intermediate Unit 13
Jessica Diller	Administrator	Lancaster-Lebanon Intermediate Unit 13
Nicole Thompson	Staff Member	Lancaster-Lebanon Intermediate Unit 13
Natalie Devens	Staff Member	Lancaster-Lebanon Intermediate Unit 13
Laura Miller	Staff Member	Lancaster-Lebanon Intermediate Unit 13
Amanda Paveglio	Administrator	Lancaster-Lebanon Intermediate Unit 13
Laura Lent	Administrator	Lancaster-Lebanon Intermediate Unit 13
Patrick Kingree	Administrator	Lancaster-Lebanon Intermediate Unit 13
John Przychodzien	Administrator	Lancaster-Lebanon Intermediate Unit 13
Susan Billy	Administrator	Lancaster-Lebanon Intermediate Unit 13
Maureen Gamber	Staff Member	Lancaster-Lebanon Intermediate Unit 13
Ann Spinner	Administrator	Lancaster-Lebanon Intermediate Unit 13
Dr. Angela Kirby	Administrator	Lancaster-Lebanon Intermediate Unit 13
Steve Frey	Administrator	Lancaster-Lebanon Intermediate Unit 13
Bernadette McLennan	Staff Member	Lancaster-Lebanon Intermediate Unit 13

<b>Name</b>	<b>Position</b>	<b>Building/Group</b>
Cheryl Hiester	Community Partner	Literacy Council
Carrie Bruey	Administrator	Lancaster-Lebanon Intermediate Unit 13
Diane Janney Schall	Administrator	Lancaster-Lebanon Intermediate Unit 13
Jennifer Reinhart	Administrator	Lancaster-Lebanon Intermediate Unit 13
Mike DeBakey	Administrator	Lancaster-Lebanon Intermediate Unit 13
Tim Evans	Administrator	Lancaster-Lebanon Intermediate Unit 13
Noel Johns	Administrator	Lancaster-Lebanon Intermediate Unit 13
Pat Pontz	Administrator	Lancaster-Lebanon Intermediate Unit 13
Matthew Stem	Administrator	Lancaster-Lebanon Intermediate Unit 13

## ESTABLISHED PRIORITIES

### Priority Statement

### Outcome Category

IU13 will recruit, develop, and retain a talented, diverse, service-oriented, and inclusive team across all areas of the organization.

Essential Practices 4: Implement Data-Driven Human Capital Strategies

IU 13 will examine its current policies, practices, and programs in relation to access, opportunity and belonging, and will implement key strategies to enhance our organizational culture and system.

Essential Practices 5: Allocate Resources Strategically and Equitably

Essential Practices 1: Focus on Continuous Improvement of Instruction

IU13 will complete a multi-year refresh of identified IU13 facilities, resulting in quality learning spaces for the different learners served by the IU.

Other

Other

## ACTION PLAN AND STEPS

### Evidence-based Strategy

Data analysis



## Measurable Goals

Goal Nickname	Measurable Goal Statement (Smart Goal)
Significant Disproportionality Data	IU13 will share data related to race/ethnicity, least restrictive environment (LRE), and discipline/suspension rates of students in IU classes with the participating school districts to determine if there is significant disproportionality across IU programs.

Action Step	Anticipated Start/Completion	Lead Person/Position	Materials/Resources/Supports Needed
Revise data fields in the current data collection system to capture the race/ethnicity of students, the least restrictive environment information, and the suspension/discipline data of students served in IU classes.	2021-07-01 - 2022-06-30	Sherry Zubeck	Name of data tool
Train IU supervisors of ECSES classes on how to analyze the new data to identify any trends or patterns that may indicate the presence of significant disproportionality across IU programs.	2022-07-01 - 2023-06-30	Sherry Zubeck, Director of Early Childhood and Special Education Services	Access to data collection tools, templates for data analysis
Communicate any identified findings of significant disproportionality related to students served in ECSES to IU13 districts.	2023-07-01 - 2024-06-30	Sherry Zubeck, Director of Early Childhood and Special Education Services	Generated reports



### Anticipated Outcome

Significant disproportionality reports by district

### Monitoring/Evaluation

Progress monitored by the department director and senior leaders in the ECSES department.

### Evidence-based Strategy

Quality Professional Learning & Empowered Staff

### Measurable Goals

#### Goal Nickname

#### Measurable Goal Statement (Smart Goal)

Access, Opportunity and Belonging Plan

IU13 will implement an organization-wide action plan on access, opportunity and belonging to inform policies, practices, and programs to foster strategic and equitable allocation of resources.

Action Step	Anticipated Start/Completion	Lead Person/Position	Materials/Resources/Supports Needed
Conduct an organization-wide needs assessment of policies, practices, and programs related to access, opportunity and belonging .	2021-10-01 - 2022-06-30	Joey Bertrand, Director of Instructional Services	Audit and Survey Resources; IU13 Data Elements; Internal Committee Work Groups
Form an organization-wide committee, which will meet	2021-01-01 -	Joey Bertrand,	Zoom; Volunteers from each

<b>Action Step</b>	<b>Anticipated Start/Completion</b>	<b>Lead Person/Position</b>	<b>Materials/Resources/Supports Needed</b>
monthly to identify the access, opportunity and belonging focus for 2021-2024.	2021-06-30	Director of Instructional Services	department; Time
Research, select and contract with a consultant to support the work of the committee and the organization.	2021-07-01 - 2021-09-30	Joey Bertrand, Director of Instructional Services	Referrals/Recommendations from other organizations; Funding
Analyze the results of the needs assessment and share them with appropriate stakeholder groups.	2022-07-01 - 2022-10-30	Joey Bertrand, Director of Instructional Services	Needs Assessment Report; Time
Based on the needs assessment, develop an organization-wide action plan to address access, opportunity and belonging.	2022-11-01 - 2023-06-30	Joey Bertrand, Director of Instructional Services	Internal Committee Work Groups, Time, Senior Leader Buy-In
Communicate the IU13 action plan with all staff and begin to implement it at the departmental level.	2023-07-01 - 2024-06-30	Joey Bertrand, Director of Instructional Services	Internal Committee, Department Leaders, Time, Possibly Funding to Implement Plan
Build capacity of IU13 staff to implement the action plan.	2023-07-01 - 2024-06-30	Joey Bertrand, Director of Instructional	Time, Presenters/PD Facilitators, Funding

Action Step	Anticipated Start/Completion	Lead Person/Position	Materials/Resources/Supports Needed
Begin to implement changes to policies, practices, and programs described in the action plan.	2023-07-01 - 2024-06-30	Services Joey Bertrand, Director of Instructional Services	Internal Committee, Department Leaders, Time, Possibly Funding to Implement Plan

**Anticipated Outcome**  
Needs Assessment; Action Plan; Policy revisions to reflect access, opportunity and belonging; Employee learning opportunities related to access, opportunity and belonging; Programmatic improvements

**Monitoring/Evaluation**  
Progress monitored by the internal committee and leaders in each department

**Evidence-based Strategy**  
Alternative Pathways for Credentialing Staff

**Measurable Goals**

Goal Nickname	Measurable Goal Statement (Smart Goal)
Recruitment of staff	IU13 will Implement new and innovative pathways/strategies designed to attract well-trained, properly

**Goal Nickname****Measurable Goal Statement (Smart Goal)**

credentialed, and diverse staff from within the organization as well as external sources.

**Action Step****Anticipated Start/Completion****Lead Person/Position****Materials/Resources/Supports Needed**

Develop MOUs with ECSES, associations, and the IU Board which increase the feasibility for staff to pursue teacher certification.

2021-07-01 -  
2021-08-31

Noel Johns,  
Program Director

None

Partner with universities to make available flexible and attainable certification pathways.

2022-01-03 -  
2023-06-30

Noel Johns,  
Program Director,  
HR

None

Implement newly developed pathways.

2023-07-01 -  
2024-06-30

Noel Johns,  
Program Director,  
HR

None

**Anticipated Outcome**

Completed MOUs and information on alternative and innovative pathways posted on MyIU.

**Monitoring/Evaluation**

Association feedback and board approval

## Evidence-based Strategy

Code-Compliant, Renovated Facilities

## Measurable Goals

### Goal Nickname

### Measurable Goal Statement (Smart Goal)

Facilities Capital  
Improvement Plan

IU13 buildings will be renovated as needed to be code-compliant, support staff and student health and align with program needs.

### Action Step

### Anticipated Start/Completion

### Lead Person/Position

### Materials/Resources/Supports Needed

Complete renovations to the  
Central Education Center (CEC).

2021-01-01 -  
2022-04-01

Tim Laubach, Director of Technology and Facilities,  
Scott Lokey, Program Director, Facilities

Lancaster-Lebanon Joint  
Authority

Complete refresh of Fairland  
building for use by the Partial  
Hospitalization Program (PHP).

2021-07-01 -  
2021-12-31

Scott Lokey, Program Director, Facilities, Bruce  
Quinn, Facilities, Jim Croyle, Program Supervisor,  
ECSES

Lancaster-Lebanon Joint  
Authority

Complete construction of the  
Community Education Center at  
Burle Business Part in Lancaster.

2021-09-01 -  
2022-06-30

Tim Laubach, Director of Technology and Facilities,  
Scott Lokey, Program Director, Facilities, Joey  
Bertrand, Director of IS, John Przychodzien,  
Facilities

Lancaster-Lebanon Joint  
Authority, Jersey Holding  
(Burle Business Park  
owners)

## Anticipated Outcome

Renovated buildings

## Monitoring/Evaluation

Renovations and construction meet building codes.

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### Evidence-based Strategy

Redesigned Office Spaces

### Measurable Goals

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#### Goal Nickname

#### Measurable Goal Statement (Smart Goal)

Facilities Capital  
Improvement Plan

IU13 buildings will be renovated as needed to be code-compliant, support staff and student health and align with program needs.

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Action Step	Anticipated Start/Completion	Lead Person/Position	Materials/Resources/Supports Needed
Construct collaborative spaces and align offices and cubicles to support hoteling and other needs in Phase 1 areas.	2021-07-01 - 2022-06-30	Tim Laubach, Technology and Facilities Director, Department Directors	Facilities team, input from Act 93, and support staff
Construct collaborative spaces and align offices and cubicles to support hoteling and other needs in Phase 2 areas.	2022-07-01 - 2023-06-30	Tim Laubach, Technology and Facilities Director, Department Directors	Facilities team, input from Act 93, and support staff

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### Anticipated Outcome

Completed redesigned office spaces

**Monitoring/Evaluation**

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Completed project checklists

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## PROFESSIONAL DEVELOPMENT STEPS AND TIMELINES:

Measurable Goals	Action Plan Name	Professional Development Step	Anticipated Timeline
IU13 will share data related to race/ethnicity, least restrictive environment (LRE), and discipline/suspension rates of students in IU classes with the participating school districts to determine if there is significant disproportionality across IU programs. (Significant Disproportionality Data)	Data analysis	Train IU supervisors of ECSES classes on how to analyze the new data to identify any trends or patterns that may indicate the presence of significant disproportionality across IU programs.	07/01/2022 - 06/30/2023

## PROFESSIONAL DEVELOPMENT STEPS AND TIMELINES:

Measurable Goals	Action Plan Name	Professional Development Step	Anticipated Timeline
IU13 will implement an organization-wide action plan on access, opportunity and belonging to inform policies, practices, and programs to foster strategic and equitable allocation of resources. (Access, Opportunity and Belonging Plan)	Quality Professional Learning & Empowered Staff	Build capacity of IU13 staff to implement the action plan.	07/01/2023 - 06/30/2024

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## COMMUNICATION PLAN - STEPS AND TIMELINES:

Measurable Goals	Action Plan Name	Communication Step	Anticipated Timeline
IU13 will share data related to race/ethnicity, least restrictive environment (LRE), and discipline/suspension rates of students in IU classes with the participating school districts to determine if there is significant disproportionality across IU programs. (Significant Disproportionality Data)	Data analysis	Revise data fields in the current data collection system to capture the race/ethnicity of students, the least restrictive environment information, and the suspension/discipline data of students served in IU classes.	07/01/2021 - 06/30/2022

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## COMMUNICATION PLAN - STEPS AND TIMELINES:

Measurable Goals	Action Plan Name	Communication Step	Anticipated Timeline
IU13 will share data related to race/ethnicity, least restrictive environment (LRE), and discipline/suspension rates of students in IU classes with the participating school districts to determine if there is significant disproportionality across IU programs. (Significant Disproportionality Data)	Data analysis	Communicate any identified findings of significant disproportionality related to students served in ECSES to IU13 districts.	07/01/2023 - 06/30/2024

## COMMUNICATION PLAN - STEPS AND TIMELINES:

Measurable Goals	Action Plan Name	Communication Step	Anticipated Timeline
IU13 will implement an organization-wide action plan on access, opportunity and belonging to inform policies, practices, and programs to foster strategic and equitable allocation of resources. (Access, Opportunity and Belonging Plan)	Quality Professional Learning & Empowered Staff	Form an organization-wide committee, which will meet monthly to identify the access, opportunity and belonging focus for 2021-2024.	01/01/2021 - 06/30/2021

## COMMUNICATION PLAN - STEPS AND TIMELINES:

Measurable Goals	Action Plan Name	Communication Step	Anticipated Timeline
IU13 will implement an organization-wide action plan on access, opportunity and belonging to inform policies, practices, and programs to foster strategic and equitable allocation of resources. (Access, Opportunity and Belonging Plan)	Quality Professional Learning & Empowered Staff	Conduct an organization-wide needs assessment of policies, practices, and programs related to access, opportunity and belonging .	10/01/2021 - 06/30/2022

## COMMUNICATION PLAN - STEPS AND TIMELINES:

Measurable Goals	Action Plan Name	Communication Step	Anticipated Timeline
IU13 will implement an organization-wide action plan on access, opportunity and belonging to inform policies, practices, and programs to foster strategic and equitable allocation of resources. (Access, Opportunity and Belonging Plan)	Quality Professional Learning & Empowered Staff	Communicate the IU13 action plan with all staff and begin to implement it at the departmental level.	07/01/2023 - 06/30/2024

## COMMUNICATION PLAN - STEPS AND TIMELINES:

Measurable Goals	Action Plan Name	Communication Step	Anticipated Timeline
IU13 will Implement new and innovative pathways/strategies designed to attract well-trained, properly credentialed, and diverse staff from within the organization as well as external sources. (Recruitment of staff)	Alternative Pathways for Credentialing Staff	Develop MOUs with ECSES, associations, and the IU Board which increase the feasibility for staff to pursue teacher certification.	07/01/2021 - 08/31/2021



## COMMUNICATION PLAN - STEPS AND TIMELINES:

Measurable Goals	Action Plan Name	Communication Step	Anticipated Timeline
IU13 will Implement new and innovative pathways/strategies designed to attract well-trained, properly credentialed, and diverse staff from within the organization as well as external sources. (Recruitment of staff)	Alternative Pathways for Credentialing Staff	Partner with universities to make available flexible and attainable certification pathways.	01/03/2022 - 06/30/2023

## COMMUNICATION PLAN - STEPS AND TIMELINES:

Measurable Goals	Action Plan Name	Communication Step	Anticipated Timeline
IU13 will Implement new and innovative pathways/strategies designed to attract well-trained, properly credentialed, and diverse staff from within the organization as well as external sources. (Recruitment of staff)	Alternative Pathways for Credentialing Staff	Implement newly developed pathways.	07/01/2023 - 06/30/2024

## COMMUNICATION PLAN - STEPS AND TIMELINES:

Measurable Goals	Action Plan Name	Communication Step	Anticipated Timeline
IU13 buildings will be renovated as needed to be code-compliant, support staff and student health and align with program needs. (Facilities Capital Improvement Plan)	Code-Compliant, Renovated Facilities	Complete construction of the Community Education Center at Burle Business Part in Lancaster.	09/01/2021 - 06/30/2022

## COMMUNICATION PLAN - STEPS AND TIMELINES:

Measurable Goals	Action Plan Name	Communication Step	Anticipated Timeline
IU13 buildings will be renovated as needed to be code-compliant, support staff and student health and align with program needs. (Facilities Capital Improvement Plan)	Redesigned Office Spaces	Construct collaborative spaces and align offices and cubicles to support hoteling and other needs in Phase 1 areas.	07/01/2021 - 06/30/2022

## COMMUNICATION PLAN - STEPS AND TIMELINES:

Measurable Goals	Action Plan Name	Communication Step	Anticipated Timeline
IU13 buildings will be renovated as needed to be code-compliant, support staff and student health and align with program needs. (Facilities Capital Improvement Plan)	Redesigned Office Spaces	Construct collaborative spaces and align offices and cubicles to support hoteling and other needs in Phase 2 areas.	07/01/2022 - 06/30/2023

## **APPROVALS & SIGNATURES**

### **Assurance of Quality and Accountability**

As Executive Director, I affirm that this IU Level Plan was developed in accordance, and will comply with the applicable provisions of 22 Pa. Code, Chapters 4, 12, 14, 16 and 49. I also affirm that the governing board reviewed the IU Level Plan, as indicated in the attached official Board minutes and the contents of the plan are true and correct. Finally, I affirm that the plan was placed for public inspection and comment in the IU offices and in the nearest public library before the next regularly scheduled meeting of the board and for a minimum of 28 days prior to approval by the board or governing body and submission to the Department.

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School Board Minutes or Affirmation Statement

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**Signature (Entered Electronically and must have access to web application).**

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Executive Director

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## ADDENDUM A: BACKGROUND INFORMATION TO INFORM PLAN

### Strengths

IU13 State Systems of Support (SSOS) Point of Contacts (POC) actively participate in all SSOS initiatives, complete all deliverables, and contribute to local, regional, and statewide success.

Existing networks at IU13 (job-alike groups, leadership collaboratives, and professional learning communities (PLCs) are leveraged to disseminate information and engage districts in SSOS initiatives.

Relationships of IU13 staff with district personnel are strong and built on a foundation of trust and capacity-building.

IU13's practices foster a vision and culture of high expectations for success for all stakeholders.

IU13 coordinates and monitors supports aligned with learners' and families' needs.

IU13 supports the development, professional learning, and advancement of employees in alignment with the intermediate unit's mission, vision, and values.

IU13 continues to offer comprehensive support to school districts

### Challenges

The pandemic initially delayed some State Systems of Support (SSOS) deliverables.

Not all SSOS initiatives and deliverables are aligned to the needs of districts, educators, and learners in the IU13 region.

The IU continues to be challenged to find means of engaging in meaningful two-way communication with stakeholders to establish and sustain shared responsibility for learning across the Intermediate Unit.

The recruitment and retention of fully credentialed, experienced, and high-quality employees is an ongoing area of difficulty for the intermediate unit.

The IU should continue to improve its ability to allocate resources strategically and equitably based on the analysis of data.

IU13 has been challenged throughout the school year to provide face-to-face instruction to its students and professional development to educators due to the ongoing COVID-19 pandemic.

The evolving PA Department of Health and PA Department of

## Strengths

and students in IU13 classes through its Training and Consultation team.

IU13's Health and Safety plan provides guidance to administrators and teachers during the COVID-19 pandemic. This includes detailed protocols and tracking COVID-19 cases to monitor outbreaks.

IU13 has consistently made the safety of its employees and students a priority through the implementation of programs such as threat assessments, Safe-2-Say, de-escalation trainings and other programs.

The business model/plan put in place years ago and updated on a regular basis creates a stable environment for educational excellence and innovation.

IU13 has already begun to plan for additional needed space for classrooms and programs through the purchase of additional buildings and planned renovation of current spaces. Current plans are also underway to repurpose office space at the IU's Burle location to use for classrooms and recreational spaces.

Overall, IU13 provides quality programs in instructional services, direct services (school students), direct services (adults), nonpublic services, and early childhood services.

IU13 has an emerging focus on diversity, equity, and inclusion as

## Challenges

Education mandates and CDC guidance related to COVID-19 has complicated operations, communications, and relationships with districts.

During challenging times such as the current COVID-19 pandemic, it is easy to get caught up in thinking that is based on scarcity and deficits. The Leadership Team and staff at IU13 have intensified their efforts to prevent the current short-term situation from resulting in long-term decisions that do not advance the organization's mission, vision, and goals.

Increased renovation costs, a limited supply of materials, and competition for the needed workforce to complete building projects have increased costs and delayed timelines for planned renovations of IU13 buildings.

The IU's current system of data collection and reporting does not consistently differentiate by race, gender, and SES in order to allow for equity analysis and considerations.

IU13 has only recently decided to focus on diversity, equity, and inclusion and this focus is not consistent across the organization.

Data reporting is primarily limited to perceptual data, learning data, and limited demographic data. School programs and processes are not currently included in data reporting.



## Strengths

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part of its "Keys to Our Culture" initiative.

Districts hire IU13 consultants and/or participate in IU13 professional development and consultative services to improve instruction and learning outcomes.

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## Most Notable Observations/Patterns

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IU13's reputation and successes are built on a strong foundation of quality programming, an adaptive business model/plan, a learner-centered focus, a "people first, mission always" culture, and authentic relationships with districts and partners. The shared calling to #WorkWorthDoing includes the desire to continuously improve the organization. By maintaining a diverse clientele portfolio, IU 13 has achieved a well-balanced collection of products and services that have supported the financial health of the organization. While IU13 is proud of all that has been accomplished as an innovative educational service agency, it recognizes that there are always evolving areas for improvement. IU13 intends to prioritize the development and implementation of a facilities plan, talent recruitment, and creating a culture of belonging for all students and employees through practices that ensure access and opportunities for all to advance its mission and vision.

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Challenges	Discussion Point	Priority for Planning
<p>The IU's current system of data collection and reporting does not consistently differentiate by race, gender, and SES in order to allow for equity analysis and considerations.</p>	<p>Prior reporting mechanisms did not call out these specific categories. Academic data for students served in IU classrooms is reported to the LEA.</p>	
<p>IU13 has only recently decided to focus on diversity, equity, and inclusion and this focus is not consistent across the organization.</p>	<p>While individual programs have focused on this area, IU13 has only recently begun to discuss this topic as an organization.</p>	
<p>The IU continues to be challenged to find means of engaging in meaningful two-way communication with stakeholders to establish and sustain shared responsibility for learning across the Intermediate Unit.</p>	<p>IU13 is a large and complex organization with varied stakeholder groups that need to both receive and share information about the IU. The multiple layers make it difficult to facilitate communication between stakeholders in a timely and consistent manner.</p>	
<p>The recruitment and retention of fully credentialed, experienced, and high-quality employees is an ongoing area of difficulty for the intermediate unit.</p>	<p>Like many educational institutions, the IU has struggled to fill open positions with credentialed staff, particularly in classes that serve students with the most challenging needs.</p>	
<p>Increased renovation costs, a limited supply of materials, and competition for the needed workforce to complete building projects have increased costs and delayed timelines for planned renovations of IU13 buildings.</p>	<p>Current supply chains and worker availability have recently been disrupted by the COVID-19 pandemic. As a result, IU13's post-pandemic plans and budgets for building/renovation projects and associated costs must be revised to accommodate these new challenges.</p>	

## ADDENDUM B: ACTION PLAN

### Action Plan: Data analysis

Action Steps	Anticipated Start/Completion Date
Revise data fields in the current data collection system to capture the race/ethnicity of students, the least restrictive environment information, and the suspension/discipline data of students served in IU classes.	07/01/2021 - 06/30/2022

Monitoring/Evaluation	Anticipated Output
Progress monitored by the department director and senior leaders in the ECSES department.	Significant disproportionality reports by district

Material/Resources/Supports Needed	PD Step	Comm Step
Name of data tool	no	yes



**Action Steps****Anticipated Start/Completion Date**

Train IU supervisors of ECSES classes on how to analyze the new data to identify any trends or patterns that may indicate the presence of significant disproportionality across IU programs.

07/01/2022 - 06/30/2023

**Monitoring/Evaluation****Anticipated Output**

Progress monitored by the department director and senior leaders in the ECSES department.

Significant disproportionality reports by district

**Material/Resources/Supports Needed****PD Step****Comm Step**

Access to data collection tools, templates for data analysis

yes

no



**Action Steps**

**Anticipated Start/Completion Date**

Communicate any identified findings of significant disproportionality related to students served in ECSES to IU13 districts.

07/01/2023 - 06/30/2024

**Monitoring/Evaluation**

**Anticipated Output**

Progress monitored by the department director and senior leaders in the ECSES department.

Significant disproportionality reports by district

**Material/Resources/Supports Needed**

**PD Step**

**Comm Step**

Generated reports

no

yes

**Action Plan: Quality Professional Learning & Empowered Staff**

**Action Steps****Anticipated Start/Completion Date**

Conduct an organization-wide needs assessment of policies, practices, and programs related to access, opportunity and belonging .

10/01/2021 - 06/30/2022

**Monitoring/Evaluation****Anticipated Output**

Progress monitored by the internal committee and leaders in each department

Needs Assessment; Action Plan; Policy revisions to reflect access, opportunity and belonging; Employee learning opportunities related to access, opportunity and belonging; Programmatic improvements

**Material/Resources/Supports Needed****PD Step****Comm Step**

Audit and Survey Resources; IU13 Data Elements; Internal Committee Work Groups

no

yes



**Action Steps****Anticipated Start/Completion Date**

Form an organization-wide committee, which will meet monthly to identify the access, opportunity and belonging focus for 2021-2024.

01/01/2021 - 06/30/2021

**Monitoring/Evaluation****Anticipated Output**

Progress monitored by the internal committee and leaders in each department

Needs Assessment; Action Plan; Policy revisions to reflect access, opportunity and belonging; Employee learning opportunities related to access, opportunity and belonging; Programmatic improvements

**Material/Resources/Supports Needed****PD Step****Comm Step**

Zoom; Volunteers from each department; Time

no

yes



**Action Steps****Anticipated Start/Completion Date**

Research, select and contract with a consultant to support the work of the committee and the organization.

07/01/2021 - 09/30/2021

**Monitoring/Evaluation****Anticipated Output**

Progress monitored by the internal committee and leaders in each department

Needs Assessment; Action Plan; Policy revisions to reflect access, opportunity and belonging; Employee learning opportunities related to access, opportunity and belonging; Programmatic improvements

**Material/Resources/Supports Needed****PD Step****Comm Step**

Referrals/Recommendations from other organizations; Funding

no

no





**Action Steps****Anticipated Start/Completion Date**

Analyze the results of the needs assessment and share them with appropriate stakeholder groups.

07/01/2022 - 10/30/2022

**Monitoring/Evaluation****Anticipated Output**

Progress monitored by the internal committee and leaders in each department

Needs Assessment; Action Plan; Policy revisions to reflect access, opportunity and belonging; Employee learning opportunities related to access, opportunity and belonging; Programmatic improvements

**Material/Resources/Supports Needed****PD Step****Comm Step**

Needs Assessment Report; Time

no

no



**Action Steps****Anticipated Start/Completion Date**

Based on the needs assessment, develop an organization-wide action plan to address access, opportunity and belonging.

11/01/2022 - 06/30/2023

**Monitoring/Evaluation****Anticipated Output**

Progress monitored by the internal committee and leaders in each department

Needs Assessment; Action Plan; Policy revisions to reflect access, opportunity and belonging; Employee learning opportunities related to access, opportunity and belonging; Programmatic improvements

**Material/Resources/Supports Needed****PD Step****Comm Step**

Internal Committee Work Groups, Time, Senior Leader Buy-In

no

no



**Action Steps****Anticipated Start/Completion Date**

Communicate the IU13 action plan with all staff and begin to implement it at the departmental level.

07/01/2023 - 06/30/2024

**Monitoring/Evaluation****Anticipated Output**

Progress monitored by the internal committee and leaders in each department

Needs Assessment; Action Plan; Policy revisions to reflect access, opportunity and belonging; Employee learning opportunities related to access, opportunity and belonging; Programmatic improvements

**Material/Resources/Supports Needed****PD Step****Comm Step**

Internal Committee, Department Leaders, Time, Possibly Funding to Implement Plan

no

yes



**Action Steps****Anticipated Start/Completion Date**

Build capacity of IU13 staff to implement the action plan.

07/01/2023 - 06/30/2024

**Monitoring/Evaluation****Anticipated Output**

Progress monitored by the internal committee and leaders in each department

Needs Assessment; Action Plan; Policy revisions to reflect access, opportunity and belonging; Employee learning opportunities related to access, opportunity and belonging; Programmatic improvements

**Material/Resources/Supports Needed****PD Step****Comm Step**

Time, Presenters/PD Facilitators, Funding

yes

no



**Action Steps****Anticipated Start/Completion Date**

Begin to implement changes to policies, practices, and programs described in the action plan.

07/01/2023 - 06/30/2024

**Monitoring/Evaluation****Anticipated Output**

Progress monitored by the internal committee and leaders in each department

Needs Assessment; Action Plan; Policy revisions to reflect access, opportunity and belonging; Employee learning opportunities related to access, opportunity and belonging; Programmatic improvements

**Material/Resources/Supports Needed****PD Step****Comm Step**

Internal Committee, Department Leaders, Time, Possibly Funding to Implement Plan

no

no

**Action Plan: Alternative Pathways for Credentialing Staff**

**Action Steps****Anticipated Start/Completion Date**

Develop MOUs with ECSES, associations, and the IU Board which increase the feasibility for staff to pursue teacher certification.

07/01/2021 - 08/31/2021

**Monitoring/Evaluation****Anticipated Output**

Association feedback and board approval

Completed MOUs and information on alternative and innovative pathways posted on MyIU.

**Material/Resources/Supports Needed****PD Step****Comm Step**

None

no

yes



**Action Steps****Anticipated Start/Completion Date**

Partner with universities to make available flexible and attainable certification pathways.

01/03/2022 - 06/30/2023

**Monitoring/Evaluation****Anticipated Output**

Association feedback and board approval

Completed MOUs and information on alternative and innovative pathways posted on MyIU.

**Material/Resources/Supports Needed****PD Step****Comm Step**

None

no

yes



**Action Steps****Anticipated Start/Completion Date**

Implement newly developed pathways.

07/01/2023 - 06/30/2024

**Monitoring/Evaluation****Anticipated Output**

Association feedback and board approval

Completed MOUs and information on alternative and innovative pathways posted on MyIU.

**Material/Resources/Supports Needed****PD Step****Comm Step**

None

no

yes

**Action Plan: Code-Compliant, Renovated Facilities**



**Action Steps****Anticipated Start/Completion Date**

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Complete renovations to the Central Education Center (CEC).

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01/01/2021 - 04/01/2022

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**Monitoring/Evaluation****Anticipated Output**

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Renovations and construction meet building codes.

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Renovated buildings

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**Material/Resources/Supports Needed****PD Step****Comm Step**

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Lancaster-Lebanon Joint Authority

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no

no

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**Action Steps****Anticipated Start/Completion Date**

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Complete refresh of Fairland building for use by the Partial Hospitalization Program (PHP).

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07/01/2021 - 12/31/2021

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**Monitoring/Evaluation****Anticipated Output**

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Renovations and construction meet building codes.

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Renovated buildings

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**Material/Resources/Supports Needed****PD Step****Comm Step**

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Lancaster-Lebanon Joint Authority

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no

no

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**Action Steps****Anticipated Start/Completion Date**

Complete construction of the Community Education Center at Burle Business Part in Lancaster.

09/01/2021 - 06/30/2022

**Monitoring/Evaluation****Anticipated Output**

Renovations and construction meet building codes.

Renovated buildings

**Material/Resources/Supports Needed****PD Step****Comm Step**

Lancaster-Lebanon Joint Authority, Jersey Holding (Burle Business Park owners)

no

yes

**Action Plan: Redesigned Office Spaces**

**Action Steps****Anticipated Start/Completion Date**

Construct collaborative spaces and align offices and cubicles to support hoteling and other needs in Phase 1 areas.

07/01/2021 - 06/30/2022

**Monitoring/Evaluation****Anticipated Output**

Completed project checklists

Completed redesigned office spaces

**Material/Resources/Supports Needed****PD Step****Comm Step**

Facilities team, input from Act 93, and support staff

no

yes



**Action Steps****Anticipated Start/Completion Date**

Construct collaborative spaces and align offices and cubicles to support hoteling and other needs in Phase 2 areas.

07/01/2022 - 06/30/2023

**Monitoring/Evaluation****Anticipated Output**

Completed project checklists

Completed redesigned office spaces

**Material/Resources/Supports Needed****PD Step****Comm Step**

Facilities team, input from Act 93, and support staff

no

yes



## ADDENDUM C: PROFESSIONAL DEVELOPMENT PLANS

Measurable Goals	Action Plan Name	Professional Development Step	Anticipated Timeline
<p>IU13 will share data related to race/ethnicity, least restrictive environment (LRE), and discipline/suspension rates of students in IU classes with the participating school districts to determine if there is significant disproportionality across IU programs. (Significant Disproportionality Data)</p>	<p>Data analysis</p>	<p>Train IU supervisors of ECSES classes on how to analyze the new data to identify any trends or patterns that may indicate the presence of significant disproportionality across IU programs.</p>	<p>07/01/2022 - 06/30/2023</p>
<p>IU13 will implement an organization-wide action plan on access, opportunity and belonging to inform policies, practices, and programs to foster strategic and equitable allocation of resources. (Access, Opportunity and Belonging Plan)</p>	<p>Quality Professional Learning &amp; Empowered Staff</p>	<p>Build capacity of IU13 staff to implement the action plan.</p>	<p>07/01/2023 - 06/30/2024</p>



## PROFESSIONAL DEVELOPMENT PLANS

Professional Development Step	Audience	Topics of Prof. Dev
Data analysis to Identify Significant Disproportionality in ECSES Programs	ECSES Supervisors	The definition of significant disproportionality and its implications for special education students, data analysis strategies to identify trends and patterns in data, and the application of data analysis skills to most recent ECSES data.

Evidence of Learning	Anticipated Timeframe	Lead Person/Position
Data analysis reports indicating areas of concern will be shared with the department director and senior leaders in ECSES.	07/01/2022 - 06/30/2023	Sherry Zubeck

Danielson Framework Component Met in this Plan:	This Step meets the Requirements of State Required Trainings:
4a: Reflecting on Teaching	

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Professional Development Step	Audience	Topics of Prof. Dev
Access, Opportunity and Belonging Professional Development	IU13 administrators, professionals, and support staff	The topics for professional learning will be identified through a needs assessment (year 1), listed in an action plan (year 2), and offered to staff to build their capacity to implement the action plan (year 3).

Evidence of Learning	Anticipated Timeframe	Lead Person/Position
Each professional learning opportunity will include appropriate evidence of learning based on the specific content. The Act 48 survey will be used as a tool to collect general evidence of learning and award Act 48 credit.	07/01/2023 - 06/30/2024	Joey Bertrand

Danielson Framework Component Met in this Plan:	This Step meets the Requirements of State Required Trainings:
	Teaching Diverse Learners in an Inclusive Setting Teaching Diverse Learners in an Inclusive Setting Teaching Diverse Learners in an Inclusive Setting





## ADDENDUM D: ACTION PLAN COMMUNICATION

Measurable Goals	Action Plan Name	Communication Step	Anticipated Timeline
<p>IU13 will share data related to race/ethnicity, least restrictive environment (LRE), and discipline/suspension rates of students in IU classes with the participating school districts to determine if there is significant disproportionality across IU programs. (Significant Disproportionality Data)</p>	Data analysis	<p>Revise data fields in the current data collection system to capture the race/ethnicity of students, the least restrictive environment information, and the suspension/discipline data of students served in IU classes.</p>	2021-07-01 - 2022-06-30
<p>IU13 will share data related to race/ethnicity, least restrictive environment (LRE), and discipline/suspension rates of students in IU classes with the participating school districts to determine if there is significant disproportionality across IU programs. (Significant Disproportionality Data)</p>	Data analysis	<p>Communicate any identified findings of significant disproportionality related to students served in ECSES to IU13 districts.</p>	2023-07-01 - 2024-06-30
<p>IU13 will implement an organization-wide action plan on access, opportunity and</p>	Quality	Form an	2021-01-01

Measurable Goals	Action Plan Name	Communication Step	Anticipated Timeline
<p>belonging to inform policies, practices, and programs to foster strategic and equitable allocation of resources. (Access, Opportunity and Belonging Plan)</p>	<p>Professional Learning &amp; Empowered Staff</p>	<p>organization-wide committee, which will meet monthly to identify the access, opportunity and belonging focus for 2021-2024.</p>	<p>- 2021-06-30</p>
<p>IU13 will implement an organization-wide action plan on access, opportunity and belonging to inform policies, practices, and programs to foster strategic and equitable allocation of resources. (Access, Opportunity and Belonging Plan)</p>	<p>Quality Professional Learning &amp; Empowered Staff</p>	<p>Conduct an organization-wide needs assessment of policies, practices, and programs related to access, opportunity and belonging .</p>	<p>2021-10-01 - 2022-06-30</p>
<p>IU13 will implement an organization-wide action plan on access, opportunity and belonging to inform policies, practices, and programs to foster strategic and equitable allocation of resources. (Access, Opportunity and Belonging Plan)</p>	<p>Quality Professional Learning &amp; Empowered Staff</p>	<p>Communicate the IU13 action plan with all staff and begin to implement it at the departmental level.</p>	<p>2023-07-01 - 2024-06-30</p>
<p>IU13 will Implement new and innovative pathways/strategies designed to attract well-trained, properly credentialed, and diverse staff from within the organization as well as external sources. (Recruitment of staff)</p>	<p>Alternative Pathways for Credentialing</p>	<p>Develop MOUs with ECSES, associations, and the IU Board</p>	<p>2021-07-01 - 2021-08-31</p>

Measurable Goals	Action Plan Name	Communication Step	Anticipated Timeline
	Staff	which increase the feasibility for staff to pursue teacher certification.	
IU13 will Implement new and innovative pathways/strategies designed to attract well-trained, properly credentialed, and diverse staff from within the organization as well as external sources. (Recruitment of staff)	Alternative Pathways for Credentialing Staff	Partner with universities to make available flexible and attainable certification pathways.	2022-01-03 - 2023-06-30
IU13 will Implement new and innovative pathways/strategies designed to attract well-trained, properly credentialed, and diverse staff from within the organization as well as external sources. (Recruitment of staff)	Alternative Pathways for Credentialing Staff	Implement newly developed pathways.	2023-07-01 - 2024-06-30
IU13 buildings will be renovated as needed to be code-compliant, support staff and student health and align with program needs. (Facilities Capital Improvement Plan)	Code-Compliant, Renovated Facilities	Complete construction of the Community Education Center at Burle Business Part in Lancaster.	2021-09-01 - 2022-06-30
IU13 buildings will be renovated as needed to be code-compliant, support staff and student health and align with program needs. (Facilities Capital Improvement Plan)	Redesigned Office Spaces	Construct collaborative spaces and align offices and	2021-07-01 - 2022-06-30

Measurable Goals	Action Plan Name	Communication Step	Anticipated Timeline
		cubicles to support hoteling and other needs in Phase 1 areas.	
IU13 buildings will be renovated as needed to be code-compliant, support staff and student health and align with program needs. (Facilities Capital Improvement Plan)	Redesigned Office Spaces	Construct collaborative spaces and align offices and cubicles to support hoteling and other needs in Phase 2 areas.	2022-07-01 - 2023-06-30

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## COMMUNICATIONS PLAN

Communication Step	Audience	Topics/Message of Communication
New data collection items to identify significant disproportionality across ECSES programs	PIMS administrators and ECSES supervisors	New data fields identification and data collection strategies for race/ethnicity, LRE and discipline/suspension data

**Anticipated Timeframe****Frequency****Delivery Method**

07/01/2022 - 06/30/2023

Initial presentation and follow-up as needed.

Presentation

**Lead Person/Position**

Sherry Zubeck

**Communication Step****Audience****Topics/Message of Communication**

Significant disproportionality reports

IU13 school district special education administrators

Significant disproportionality reports

**Anticipated Timeframe****Frequency****Delivery Method**

07/01/2023 - 06/30/2024

Once

Email  
Posting on district website**Lead Person/Position**

Sherry Zubeck

<b>Communication Step</b>	<b>Audience</b>	<b>Topics/Message of Communication</b>
New flexible teacher credentialing pathways	IU13 staff, Lancaster and Lebanon county communities, and IU13 Board of Directors	Information on new ways for teachers to pursue teacher certification and other educational credentials.

<b>Anticipated Timeframe</b>	<b>Frequency</b>	<b>Delivery Method</b>
08/30/2021 - 10/03/2021	Information will be updated as new pathways are developed.	Posting on district website

<b>Lead Person/Position</b>
Noel Johns, Program Director

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<b>Communication Step</b>	<b>Audience</b>	<b>Topics/Message of Communication</b>
Redesigned office spaces	Act 93 and support staff working at Burle Business Park	Expectations of staff use of redesigned spaces, office locations

<b>Anticipated Timeframe</b>	<b>Frequency</b>	<b>Delivery Method</b>
07/01/2021 - 06/30/2023	As needed as areas are completed.	Email

**Lead Person/Position**

EDO Corporate Communications, Department Directors

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**Communication Step**

**Audience**

**Topics/Message of Communication**

Redesigned office spaces

Act 93 and support staff working at  
Burle Business Park

Expectations of staff use of redesigned  
spaces, office locations

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**Anticipated Timeframe**

**Frequency**

**Delivery Method**

07/01/2021 - 06/30/2023

As needed as areas are completed.

Email

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**Lead Person/Position**

EDO Corporate Communications, Department Directors

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Communication Step	Audience	Topics/Message of Communication
Internal Committee Formation	IU13 staff and Board of Directors	An organization-wide committee was formed; Approximately 25 members representing all departments and employee groups (Act 93, professional, and support staff); Meets monthly; Purpose/role; and Priorities/goals.

Anticipated Timeframe	Frequency	Delivery Method
01/01/2021 - 12/30/2021	Use a multi-point approach to communicate internal committee formation during leadership council, departmental, program, and board meetings.	Other

Lead Person/Position
Joey Bertrand

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<b>Communication Step</b>	<b>Audience</b>	<b>Topics/Message of Communication</b>
Access, Opportunity and Belonging Needs Assessment	IU13 Staff and Board of Directors	Enterprise-wide needs assessment will be conducted in 2021-22; consultant will guide and support IU13 staff in the process; Describe roles of consultant, internal committee, departments, and leadership in the process; and Describe scope/scale of the needs assessment.

<b>Anticipated Timeframe</b>	<b>Frequency</b>	<b>Delivery Method</b>
10/01/2021 - 06/30/2022	Send email at onset and throughout process as needed.	Email

<b>Lead Person/Position</b>
Joey Bertrand

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<b>Communication Step</b>	<b>Audience</b>	<b>Topics/Message of Communication</b>
Access, Opportunity and Belonging Action Plan	IU13 Staff and Board of Directors	Enterprise-wide action plan has been developed in 2022-23, based on a needs assessment that was conducted in 2021-22; Thanks to (names) involved; Provide summary of the plan.

**Anticipated Timeframe**

07/01/2023 - 06/30/2024

**Frequency**

Multiple types of communication will be leveraged throughout 2023-24 to share the action plan.

**Delivery Method**

Other

**Lead Person/Position**

Joey Bertrand



## **ADDENDUM E: COMPREHENSIVE PLAN COMMUNICATIONS**

**Communication Step**

**Topics of Message**

**Mode**

**Audience**

**Anticipated Timeline**

