



ALLEGHENY INTERMEDIATE UNIT

Strategic Goals Public Report

2024 - 2025



2024-2025

Strategic Goals Public Report

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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 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 2024-2025 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.

2024-2025 Strategic SMART Goals

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

1.2	Create Effective Talent Acquisition Strategy
1.2.1	<ul style="list-style-type: none"> Publish a comprehensive tool for employees and prospective employees to use for career and educational advancement.
1.3	Create Effective Retention Strategies
1.3.1	<ul style="list-style-type: none"> Implement year three of an employee engagement survey and facilitate focus group conversations with staff members.
1.3.2	<ul style="list-style-type: none"> Educate all staff members on the Appreciation and Recognition Toolkit and measure usage during the 2024-2025 school year.
1.3.3	<ul style="list-style-type: none"> Leverage data from our comprehensive market analysis to review and inform the organization's compensation and benefits package.

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

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"> Maximize the utilization of AIU's existing Oracle Fusion applications to optimize functionality, drive operational efficiencies and enhance the employee experience.

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

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">• Address priorities related to the AIU-operated Special Education Schools and the Jointure Affiliations that include managerial capacities, operational agreements and funding options.

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

4.2	Communicate to stakeholders shared services offerings
4.2.1	<ul style="list-style-type: none">• Develop and pilot a Shared Services Model for AIU Data Services that explores a data warehouse, data governance, data analysis, application support as a service and data reporting services.

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">• Utilize the advocacy ambassadors and stakeholder groups to share and gather feedback on the agency's advocacy agenda and mobilize them to influence policy makers.
5.1.2	<ul style="list-style-type: none">• Implement a public campaign that highlights the success of public schools in Allegheny County.

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	<ul style="list-style-type: none">• Develop a strategy to measure engagement with the new AIU website that is launching in the summer of 2024.
6.2	Enhance communication efforts with external stakeholders
6.2.1	<ul style="list-style-type: none">• Select, adopt and pilot a Customer Relationship Management application to support program efforts across the agency.

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

Strategic Objective: Create Effective Talent Acquisition Strategy

Publish a comprehensive tool for employees and prospective employees to use for career and education advancement.

Progress continues toward the development of a comprehensive digital tool designed to support both current and prospective employees in navigating career and educational advancement opportunities within the organization. This tool will serve as a centralized hub that integrates career pathways, educational pipelines, and apprenticeship options in a clear and user-friendly format.

Initial steps included a thorough review of the existing career pipeline tool alongside new work focused on career laddering. Collaborative meetings were held to determine how these two resources could be merged to form a single, coherent guide.

The process experienced a slight delay due to the need to finalize updated job descriptions. These descriptions are essential to accurately map pathways and ensure that the tool reflects real, actionable opportunities. We anticipated the extension to push our publishing date to the end of June 2025.

As part of the development phase, screenshots and a mock-up of the proposed tool have been created. These visuals demonstrate how the final product will look and function, showcasing its interactive elements and streamlined layout. Below are 5 screenshots showing how and what content individuals will be able to access.



BridgeUp, our partnership with Carlow University, the upcoming High School to Para-Educator initiative, and other educational pathways will all be integrated into the tool to provide users with a clear understanding of available options and how they align with various stages of their professional journey. The platform will also highlight skill-based training opportunities to support individual growth and career progression. For prospective employees, this tool will serve as a powerful recruitment asset by illustrating the tangible pathways and development opportunities available at the AIU. For current employees, it will function as a meaningful retention strategy, offering transparency around career advancement and guidance on when and how to engage with supervisors about next steps.

Strategic Objective: Create Effective Retention Strategies

Implement year three 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 third 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 in the second year of the survey to 78.5%, with 64.8% of employees completing the survey between Oct. 28 and Nov. 8. The survey included about two dozen survey questions, including those relating to demographic information and opportunities for open-ended questions. A total of 754 employees provided nearly 2,027 comments and ideas during the survey.

Energage reviewed and compiled the data, ensuring 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. Division directors continued the survey results conversations with program directors, principals, and other department leads to identify opportunities to address program and location specific information in 2025-2026.

Generated from the survey feedback, the overarching organizational priorities continue to be pay, interdepartmental cooperation, and efficiency.

Educate all staff members on the Appreciation and Recognition Toolkit and measure usage during the 2024-2025 school year.

During the 2024–2025 school year, the AIU successfully expanded awareness and use of the Appreciation and Recognition Toolkit. Through targeted education, streamlined access, and consistent communication, usage of key recognition tools increased. Staff perceptions of appreciation remained strong, supported by both usage data and survey results.

In 2023-2024, the AIU implemented an Appreciation and Recognition Toolkit to support administrators and staff with their ongoing recognition efforts. Following that implementation, the goal for 2024-2025 was to educate staff on the toolkit and measure its usage. Administrators were introduced to the tool during the August 2024 administrator monthly training which was facilitated in a hybrid environment as well as recorded for continual access. During this session, administrators received information about the benefits of recognition on retention and engagement, and were introduced to the tool and advised as to how to use it. Following that session, the program was cascaded out to all staff via the Spotlight newsletter.

In order to measure the toolkit's impact, we focused on increasing communication regarding our appreciation and recognition efforts as well as streamlined how staff can access the toolkit itself.

One of the main changes in communication regarding recognition was through the AIU's new Sharepoint intranet website, InSite. Recognition notifications were placed on the homepage of InSite throughout the year. That page is opened whenever an employee opens Launchpad. A Recognition page was added to the HR Services page in November as part of Employee Appreciation Week. More than 200 employees visited the page, which includes links to the Recognition Tool Kit, Caught in the Act, an overview of AIU Awards, the STAR Fund Request Form, and more. This is the second most viewed page on the HR Services section, behind the Evaluations page. Multiple versions of the Recognition Tool Kit have been uploaded to the page and linked in the AIU's internal newsletter, AIU Spotlight, through the year as revisions were made. The current version of the tool kit has 185 views, while the previous version had 265 views.

The Caught in the Act submission form had a more consistent use throughout the year by more of the organization than during its inaugural year. The number increased to 77 during the 2024-2025 school year. There was also more diversity in the programs making the submissions. The Caught in the Act slideshow also had an increase in viewers from last year, jumping from 118 in 2023-2024 to 221 in 2024-2025.

One of the more popular postings on InSite was the Employee Appreciation Week Online Slideshow, which had 620 views in November. This slideshow included submitted photos from employees highlighting activities during the week. This was linked on the homepage of InSite. Another InSite page focused on Employee Appreciation Week had 250 views, while one in the spring about Employee Appreciation Day had 110.

The Mission Possible nomination form was linked on the homepage of InSite in addition to on the Recognition page. A total of 103 Mission Possible nominations were submitted for more than 60 AIU employees this year. This was an increase to the 77 nominations for about 50 employees last school year. Lastly, there were 11 requests for STAR Funds made for the recognition email account during the school year.

The addition of resources on InSite is part of the overall recognition efforts at the AIU that have shown an increase in the number of employees who feel appreciated at work. According to the Energage survey results, only 46% of employees in 2022 felt genuinely appreciated. This number has increased about 22% over the past two years.

Finally, we facilitated a pulse survey at the start of the school year to create a baseline assessment regarding staff's perspective on various appreciation and recognition efforts. A follow up pulse survey was facilitated at the end of year to gauge any changes. The initial assessment indicated an average percent favorable score of 82.5% and the subsequent pulse survey yielded an average percent favorable score of 80.25%.

Leverage data from our comprehensive market analysis to review and inform the organization's compensation and benefits practices.

Led by the AIU's Chief Financial Officer and Director of Human Resources, the Finance and Human Resources departments collaborated to conduct a comprehensive market analysis. This initiative involved identifying and analyzing benchmark data to evaluate AIU's salary and employee benefits structures against comparable organizations in both public and private education, as well as other relevant labor markets.

To remain an employer of choice in the region, it is essential for AIU to regularly assess the competitiveness of its compensation practices. This analysis serves as a strategic step toward that goal.

Primary Objectives of the Market Analysis

- **Attract and Retain Talent:** Offering competitive salaries enables AIU to recruit high-quality educators, administrators, and support staff—and retain the valued employees essential to the success of our programs and services.
- **Ensure Equity and Fairness:** A comprehensive review helps identify internal and external compensation disparities, providing a foundation for equitable adjustments across job classifications and roles.
- **Support Strategic Goals:** Competitive compensation structures directly support AIU's mission by helping to sustain a strong, motivated workforce that delivers exceptional services to districts, schools, and families.
- **Respond to Market Dynamics:** Evolving labor market trends, including increased demand for talent, cost-of-living shifts, and flexible work expectations, require AIU to remain agile and proactive in adjusting salary offerings.

AIU Workforce Classifications

AIU's employees are organized into a range of collective bargaining and non-bargaining groups:

Collective Bargaining Agreements (CBAs):

- AIU Federation – AIUFT

- AIU Alternative Education Association – AIUAEA
- AIU Education Association – AIUEA
- AIU Head Start Education Association – HSEA

Non-CBA Employee Groups:

- Act 93 Employees – School administrators and select professional staff governed under Pennsylvania’s Public School Code of 1949 (Act 1984-93)
- Professional Support Staff
- Executive Leadership Team (ELT)
- Family & Community Education Services (FACES)
- Specialized Services Employees (SSE) under various agreements

Data Collection and Analysis

To complete the market review, AIU sourced and analyzed salary and benefit information from multiple internal and external references:

Internal Review: Examined all AIU employee agreements to understand and compare benefits across groups.

External Benchmarking: Reviewed collective bargaining agreements from 42 Allegheny County school districts, including:

- Teachers: 41 districts
- Paraprofessionals: 36 districts
- Custodians: 18 districts (noting that many outsource this service)
- Secretaries: 31 districts
- Educational Interpreters: Reviewed where data was available

Salary Surveys: Conducted targeted surveys for Act 93 and Professional Support positions.

Supplemental Data: Integrated labor market data from the U.S. Bureau of Labor Statistics (BLS) to provide additional insights.

The goal to leverage data from our comprehensive market analysis to review and inform the organization’s compensation and benefits practices was used in 2024-2025 to recommend salary increases, and benefit changes for the Executive Leadership Team, the professional support, and ACT 93 staff for the next 3 years.

Additionally, the analysis is currently being used to negotiate the AIU Federation – AIUFT collective bargaining agreement (currently agreement ends June 30, 2025).

The findings affirm the AIU's unwavering commitment to equity, transparency, and strategic alignment in compensation practices. More importantly, this body of work will directly inform the organization's approach to future collective bargaining negotiations, employee classification studies, and compensation-related decision-making. By leveraging this analysis, the AIU is equipped with the insights necessary to respond proactively to evolving labor market dynamics, enhance recruitment efforts, and retain the highly qualified professionals essential to delivering on its mission. This work positions the AIU to remain an employer of choice across the region—committed not only to excellence in service, but also to the fair and sustainable support of its workforce.

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

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

Maximize the utilization of AIU's existing Oracle Fusion applications to optimize functionality, drive operational efficiencies and enhance the employee experience.

In support of AIU's 2024–2025 strategic SMART goal, the team has advanced 27 strategic projects across key areas including human resources, payroll, finance, recruiting, benefits administration, and district support. Many of these projects have been successfully completed and are actively in use. Several additional initiatives are in the final stages of development and are expected to be completed as the calendar year concludes.

Cornerstone Initiative: Oracle Redwood Migration

The centerpiece of this year's transformation was the upgrade of Oracle's user interface to their "Redwood" interface. This is a modernized interface designed to deliver a more intuitive, responsive, and personalized user experience. A cross-functional project team ensured a seamless rollout through comprehensive system configuration, testing, change management, and end-user training. Redwood's adoption has modernized processes, minimized disruption, and significantly enhanced system usability.

Key Redwood Enhancements Include

- Oracle Learning (ESS): Employees now have access to an AI-powered, mobile-responsive platform that simplifies training enrollment, tracking, and career-aligned learning.
- My Activity Center: A personalized dashboard that consolidates tasks, approvals, and alerts—improving efficiency, engagement, and decision-making.
- Manager Self-Service (MSS): A unified interface across modules like Learn and Timecards improves manager visibility, streamline approvals, and strengthens accountability.
- My Team Activity Center: A real-time dashboard for managers that centralizes team data, streamlines workflows, and enables faster, data-driven decisions.
- Redwood Procurement: A guided, intuitive procurement experience that boosts compliance, reduces cycle time, and supports informed purchasing with AI-driven insights.
- Administration Pages: Enhanced administration pages allowing for more efficient data tracking and processing.

Additional Strategic Accomplishments

- Automated Employee Compensation Letters: Streamlined the creation and secure distribution of personalized letters, reducing errors and manual effort while enhancing communication.
- Total Reward Statement: Delivered a digital, comprehensive view of each employee's total compensation, supporting transparency, engagement, and retention.
- Approval Delegation Process: Enabled seamless delegation of approval workflows during staff absences, ensuring operational continuity and compliance.
- Learning Management Dashboard: Offered real-time training analytics to track learning progress, identify gaps, and inform workforce development strategies.
- MICR Check Configuration: Ensured secure, compliant, and efficient check processing with machine-readable encoding.
- Recurring Journal Entries: Automated repetitive accounting tasks, reducing manual workload and improving accuracy and compliance.
- AFR Automation to PDE (In Progress): Streamlined the Annual Financial Report submission process, improving accuracy, compliance, and staff productivity.
- Automatic AP Check Matching: Enhanced accuracy and efficiency in invoice reconciliation, reducing errors and accelerating financial close.
- Time and Labor for Teacher Work Orders: Replaced Excel-based tracking with an integrated system for real-time visibility, compliance, and efficiency.
- Oracle Recruiting Cloud Migration (In Progress): Unified and modernized the talent acquisition process, improving candidate experience and internal efficiency.
- Position Management Implementation: Strengthened workforce planning, budgeting, and HR compliance through centralized job and position tracking.
- 834 Transmittal File Implementation: Automated and standardized benefits enrollment transmissions for multiple districts, improving accuracy and compliance.
- COVID Journey Archiving & PAF Proof of Concept: Advanced digital HR workflows and data management capabilities.
- District Benefits Review (Riverview, Penn Hills, Duquesne, Steel Valley): Ensured accurate configuration and alignment of benefit offerings across multiple districts.

Together, these initiatives demonstrate AIU's dedication to operational excellence, digital innovation, and delivering a high-quality employee experience—strategically leveraging Oracle Fusion to not only meet day-to-day operational needs but also drive long-term organizational goals and continuous improvement.

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

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

Address priorities related to the AIU-operated Special Education Schools and the Jointure Affiliations that include managerial capacities, operational agreements and funding options.

The 2024-2025 Smart Goal is an extension of the preceding year’s work, reviewing the tuition model and long-term facilities plans for the three AIU-operated special education schools. The initial smart goal from 2023-2024 resulted in four key focus areas and subitems in which future work needs to be situated (see Table 1).

Table 1

Fees and Finances Reconciliation Concepts Fee for Service Usage Fees	Jointure Relations Agreements Management Efficiencies/Shared Positions Capacity Building Awareness
Future Planning/Alternatives Contingency Plans Consolidation Considerations Ownership Agreements	Facility Needs (no subitems)

In addition to identifying the goal’s four key focus areas, work accomplished during the 2023-2024 school year centered largely on Jointure Relations with the three AIU-operated Special Education Schools: Mon Valley (Southeast Area Special Schools Jointure), Pathfinder (South Central Area Special Schools Jointure), and Sunrise (Eastern Area Special Schools Jointure). The groundwork for the jointure agreements was established with both Sunrise and Pathfinder, with the Mon Valley Agreement being previously developed and approved in 2023. The AIU-operated Special Education Schools Facility Manager, a newly created position for the shared benefit of the AIU and the three jointures, was posted and filled by July 1, 2024. Targeted conversations were addressed with the county’s Special Education Directors in November and December of the 2023-2024 school year, re-establishing an awareness of the jointure committees’ structures and the funding system associated with the operation of the three special education schools.

For the current school year, the smart goal focused on specific subitems that fell under three of the four focus areas: Jointure Relations, Facility Needs, and Fees and Finances.

Regarding the reference to managerial capacities as stated in the goal, the following actions were taken. Mr. Dave Matzie, the AIU-operated Special Education Schools Facility Manager, was onboarded and began working with the three special education schools' principals as well as each of the schools' jointure committees. Whereas Mr. Matzie established his office at the Sunrise School, met weekly with the principles during the Assistant Executive Director's standing meetings with the school administrators as well met with principals just-in-time when on-site for various building matters, reported to each of the three schools' jointure members during the jointures' monthly committee meetings, and began supervising the AIU employed special education schools' custodial staff. Mr. Matzie prioritized his attention to facility needs, such as those requiring immediate attention and those that will require future considerations because of the related expense. Mr. Matzie worked with two of the jointures on reviewing or updating their facilities studies, prioritizing the studies' recommendations for action, and setting informal short and intermediate range plans. Such steps addressed subitems and/or focus areas identified in 2023-2024. Specifically, two subitems, Management Efficiencies/Shared Positions and Capacity Building, associated with Jointure Relations were addressed as well as the more generalized focus area pertaining to Facility Needs.

Regarding the references in the SMART goal to operational agreements and funding, both the Sunrise and Pathfinder jointures entered into multi-year agreements with the AIU. The Eastern Area Special Schools agreement was approved by the AIU Board of Directors on January 27, 2025. In lieu of rent, the AIU is responsible for the administration and operation of the Sunrise School programming and all payments due under Act 77 as obligated through June 2028. The agreement with the Sunrise jointure expires on June 30, 2028. The South Central Area Special Schools agreement was approved by the AIU Board of Directors on February 25, 2025. In lieu of rent, the AIU is responsible for the administration and operation of the Pathfinder School programming and all payments due under Act 77 as obligated through November 2025. Starting in December 2025, the AIU will pay the amount of \$13,000 per month towards the jointure's cost of maintaining the facility. The agreement with the Pathfinder jointure expires on June 30, 2029. The expenses associated with the school's programming, Act 77, and payment towards the Pathfinder jointure's cost of maintaining the facility are covered through the AIU's fee for services collected as annual tuition rates paid by the Districts and Charter Schools that have students enrolled in these programs. (Note that the Mon Valley jointure's agreement with the AIU expires on September 1, 2025.) Such steps addressed Agreements, a subitem associated with Jointure Relations.

Also, with regard to funding, the AIU Board of Directors approved program budgets on March 24, 2025 for the division's special education schools. The increase in the schools' overall budgets for the 2025-2026 school year range from 5.3% to 10.6%. However, the impact on individual student tuition rates for the next school year is more notable. [Tuition rates](#) (i.e., AIU's fee for service) for 2025-2026 will increase between 11.2% and 12.2%. The increases are largely driven by salaries and benefits, impacted further by collective bargaining, the introduction of payment in

lieu of rent for two of the school jointures, and balancing individual program rates in an effort to minimize overall deficits. Note that the schools have not seen significant changes in enrollment, programming, or the number of AIU staff necessary to operate the programs. It is important to emphasize that the annual fiscal reconciliation for the three schools assures that any surplus in tuition is returned to the sending districts and that any shortfalls are assessed to make the programs fiscally whole without adverse effect to the intermediate unit. The development of an approved budget for the 2025-2026 school year, along with a projected preliminary budget addressing salaries and benefits for the 2025-2026 school year, gives the division insight into cost projections associated with the collective bargaining with the AIUFT and AIUEA. Bargaining with the AIUFT began in January 2025 and bargaining with the AIUEA will begin no later than January 2026. This type of fiscal forecasting is an essential requisite towards addressing Fee for Service as a subitem under the focus area labeled Fees and Funding.

Collaboration, one of the AIU's core beliefs, not only encourages the diversity of thoughts, experiences, and backgrounds, but also fosters meaningful participation and partnership across all our endeavors. The success of the current SMART goal is a direct result of collective efforts by Human Resources, Finance, the General Counsel, and the Division of Special Education and Pupil Services, demonstrating the power of connection and shared purpose.

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

Strategic Objective: Communicate to stakeholders shared services offerings

Develop and pilot a Shared Services Model for AIU Data Services that explores a data warehouse, data governance, data analysis, application support as a service and data reporting services.

Over the past 18 months, the AIU's Technology Services Team has engaged in a comprehensive collaboration with the Ed-Fi Alliance to develop a regional data hub model for Pennsylvania schools. This initiative, aligned with AIU's Strategic Goal #4 (Provide a shared services model to help educational entities maximize resources), sought to create innovative data infrastructure similar to successful models in Michigan, Texas, and South Carolina.

While the grant proposal to the Michael and Susan Dell Foundation was ultimately not approved, the effort has yielded significant organizational benefits and established a foundation for future data services expansion. The initiative has strengthened partnerships across Pennsylvania, enhanced internal capabilities, and positioned AIU to better serve districts through improved data services.

Project Background and Objectives

The collaboration began with AIU's participation in an Ed-Fi Collaboratives Boot Camp in New York City, where team members from Technology Services, School Improvement and Evaluation, and Grants & Data attended intensive sessions on technical architecture, business development, and sustainability planning. The primary objective was to develop a comprehensive grant proposal for creating a Pennsylvania data hub model.

Key Project Goals

- Establish a shared services data model for Pennsylvania school districts
- Improve data quality and reporting efficiency for member districts
- Create sustainable data infrastructure supporting school improvement initiatives
- Build partnerships with state leadership and advocacy organizations
- Develop replicable models for statewide adoption

Collaborative Partnerships Established

The initiative successfully established partnerships with key stakeholders across Pennsylvania and beyond:

Pennsylvania Association of School Administrators (PASA): Partnership with Executive Director Sherri Smith to coordinate advocacy efforts

State Data Quality Teams: Direct engagement with Pennsylvania Department of Education data teams

Legislative Advocacy: Outreach to lawmakers through Day on the Hill and Leadership Pittsburgh's Harrisburg Advocacy Day

Pennsylvania Association of Intermediate Units (PAIU): Coordination through role-alike organizations and Aspiring Leaders program

Grant Proposal Development

AIU worked with strategic partners Keen Logic LLC (Implementation Partner) and Edufied (Managed Service Provider) to develop a comprehensive proposal targeting seven pilot districts within Allegheny County. The proposal outlined a three-phase implementation plan focusing on:

School Improvement Data Visualizations: Supporting schools designated for Additional Targeted Support and Improvement (A-TSI)

Data Quality Enhancement: Implementing Pennsylvania Information Management System (PIMS) validation rules

Shared Services Infrastructure: Creating sustainable data warehouse integration

The proposal requested funding to serve approximately 13,000 students across seven pilot districts, with plans for statewide expansion.

The Michael and Susan Dell Foundation ultimately declined to approve the grant proposal, citing two primary concerns:

Insufficient state-level leadership support

High costs associated with Student Information System (SIS) implementation

These challenges were anticipated but highlight systemic barriers to Ed-Fi adoption in states where the data standard is not required for state reporting. SIS vendors typically waive implementation

costs when Ed-Fi is mandated for state reporting but charge significant fees for voluntary adoptions, creating intentional barriers to collaborative growth.

Positive Outcomes Achieved

Enhanced Partnerships

- Strengthened relationships with data teams across Pennsylvania
- Established mini data role-alike network through PAIMS and PAIU Aspiring Leaders program
- Increased collaboration opportunities across Pennsylvania intermediate units

Strategic Vendor Relationships

- Secured partnership agreement with LinkIt, providing enhanced data support capabilities for districts
- Established relationships with key data providers to Pennsylvania Department of Education
- Developed understanding of data mart integration opportunities

Internal Organizational Development

- Established development team methodology within Technology Services
- Structured internal teams for agile development of custom applications
- Enhanced technical capabilities and project management processes

Future Opportunities and Recommendations

Short-term Initiatives

- Continued State Engagement: Maintain advocacy efforts with Pennsylvania Department of Education and lawmakers regarding data hub modernization and state reporting efficiency
- Program-Focused Applications: Develop custom applications for internal program teams and similar programs across Pennsylvania, utilizing Ed-Fi common data standards
- District Data Support: Expand direct data services to member districts through established partnerships

Long-term Strategic Vision

- Revisit regional data hub development as state leadership and funding opportunities evolve
- Position AIU as a leader in Pennsylvania's data modernization efforts
- Continue building technical infrastructure to support future collaborative initiatives

Organizational Structure Recommendations

To best support expanded data services capabilities, the following organizational changes are recommended:

- Promote Current Data Services Manager to Assistant Director of Technology Services, Data Services
- Hire Technical Project Manager with focus on software development and technical project leadership, reporting directly to the Assistant Director
- Engage Development Resources through contract developer, direct hire, or remote contractor arrangement (to be determined after Technical Project Manager placement)

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

Utilize the advocacy ambassadors and stakeholder groups to share and gather feedback on the agency's advocacy agenda and mobilize them to influence policy makers.

As recounted in the Strategic Goals Final Report for 2023–2024 (pp. 35–36), eight AIU administrators from across all divisions of the agency volunteered to serve as advocacy ambassadors. The functions of the advocacy ambassador role include:

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

During 2024–2025, the advocacy ambassadors have received copies of the monthly legislative and legal update provided by the General Counsel to AIU member school districts and other groups.

An urgent advocacy issue emerged in November 2024 as Allegheny County Council considered the county budget for 2025. The county manager publicly warned that adopting a budget without the tax increase proposed by the county executive would result in drastic cuts to social services, including the elimination of funding for family support centers —such as the 10 operated by the AIU. In response to this existential threat to the AIU's family centers, all AIU employees who reside in Allegheny County were urged to contact their Council representatives to express support for maintaining funding. Advocacy ambassadors were also expected to take an additional step by mobilizing five peers within the county to do the same — and to prompt those peers to, in turn, engage their own colleagues in similar outreach. Anecdotally, County Council members reported receiving numerous expressions of support for the family centers. Moreover, the efforts of the advocacy ambassadors, other AIU employees, and the broader nonprofit community contributed

to a best-case outcome: a budget that not only maintained full family center funding but also unlocked additional state matching funds for social services.

In early 2025, advocacy ambassadors participated in onboarding meetings with the county's newest state legislators: Reps. Dan Goughnour, John Inglis, Lindsey Powell, and Jeremy Shaffer. During these approximately 30-minute meetings, the Executive Director, the General Counsel, and a representative from each AIU division provided an overview of the agency, including its mission, structure, funding, strategic goals, and key programs. The legislators were encouraged to participate in AIU-sponsored engagement opportunities throughout the year and to turn to the AIU as a resource for education policy support and collaboration.

In March 2025, nine AIU staff members — including four advocacy ambassadors participated in the Pennsylvania Association of Intermediate Units' Day on the Hill at the state Capitol in Harrisburg. The size of the AIU delegation enabled us, in just a few hours, to meet with 15 of the 23 legislators representing AIU member school districts, accounting for one-fifth of all legislative meetings scheduled by intermediate units that day. Issues discussed included funding needs and staffing challenges in early childhood education, special education, and behavioral health services, as well as support for legislation allowing intermediate units to own instructional property. Informational packets were delivered to the offices of the eight legislators with whom we were unable to schedule meetings. In the weeks following the event, advocacy ambassadors were among the team members who participated in virtual meetings with three additional legislators who could not meet with us in Harrisburg.

During the remainder of 2024–2025 and the beginning of 2025–2026, the advocacy ambassadors will likely be called upon again to contact legislators and to engage their colleagues across the county regarding funding issues that arise as the state and federal budget processes unfold.

Implement a public campaign that highlights the success of public schools in Allegheny County.

In an effort to implement a public campaign that highlights the success of public schools in Allegheny County, AIU administrators determined that a two-year effort would be required. The first year would focus on research to determine the perceptions of public education of key stakeholder groups. The second year would focus on campaign development.

From October 2024 through May 2025, the AIU conducted a multi-phase research initiative to gather vested partner perceptions about the successes and challenges of public education. The process began with a presentation at the October 4 Superintendents' Leadership Summit and November 15 Board Retreat, where initial feedback was collected. Over the following months, surveys were developed, partner groups were identified, and outreach efforts expanded to include AIU employees as well as local and state-wide school public relations professionals. These findings were used to prepare a presentation for the AIU board in May 2025.

Vested partners across Allegheny County believe that there is widespread recognition of schools' success in promoting inclusive environments, integrating technology, expanding academic opportunities, and responding to student mental health needs. Public schools are seen as adaptable, innovative, and central to the health of their communities, especially through initiatives like Remake Learning, dual enrollment, and partnerships with local businesses and nonprofits.

However, nearly all groups cited significant and recurring challenges. Chief among them are inadequate and inequitable funding, staffing shortages across all roles, rising student mental health and behavioral needs, and a lack of resources for special education and English language learners. Public perceptions—often shaped by misinformation—pose additional hurdles, including the belief that public schools are failing, wasteful, or politically biased. Our vested partners emphasized that these misconceptions fail to reflect the dedication of educators, the complexity of school operations, and the achievements of public school students.

What unites all voices is a strong message to the public: public education is not only effective, but essential. It serves all students without exception, contributes to community wellbeing, and prepares young people for college, careers, and citizenship. Continued investment, informed advocacy, and community support are vital to sustaining and strengthening public schools across the region.

With all data now collected and reviewed, the next steps include developing and launching a multi-platform public awareness campaign that showcases the successes of public schools throughout Allegheny County, effectively increasing community engagement, partner support, and widespread recognition of public education's value.

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

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

Develop a strategy to measure engagement with the new AIU website that is launching in the summer of 2024.

In October 2024, the AIU began a comprehensive initiative to better understand and measure the performance of its digital presence. The effort, led by the Technology and MarCom departments, was designed to clean up existing digital properties, explore effective analytics tools, and build a centralized dashboard for reporting key engagement metrics.

The project began with an inventory to identify all AIU-related digital sites, including lesser-known platforms like Google Sites, and a review of potential analytics and reporting tools. From the start, scope management was emphasized to ensure a focused and manageable effort, with early priorities placed on external-facing assets such as the AIU website and social media.

By November 2024, four main platforms were selected for tracking: the AIU website, social media channels, InSite, and Waterfront Learning. MarCom began evaluating existing analytics capabilities and engaged with vendors to provide professional development in Google Analytics 4 (GA4) and Google Tag Manager. A training proposal was accepted in early 2025, and the AIU entered an agreement with Silverbauer Co. to deliver virtual sessions for all MarCom staff, including hands-on dashboard and tagging guidance.

Throughout spring 2025, GA4 training progressed, including specific sessions on tag management and dashboard setup. A survey was sent to program managers to help define key measurement events. Google Tag Manager was successfully implemented on the AIU website, and new tag-based data is now being collected and funneled through Power BI for visualization. Final phases of the project include development of the live measurement dashboard and the addition of Microsoft Clarity and Cookiebot to enhance tracking and compliance.

This initiative positions the AIU for data-informed communication strategy, with better insight into audience engagement and clearer reporting capabilities across its digital platforms.

Strategic Objective: Enhance communication efforts with external stakeholders

Select, adopt and pilot a Customer Relationship Management application to support program efforts across the agency.

The AIU has successfully completed a comprehensive evaluation and selection process for a Customer Relationship Management (CRM) system to address critical organizational needs identified over the past four years. Multiple program teams across the organization had consistently requested CRM capabilities to solve challenges related to stakeholder engagement, lead management, and cross-departmental coordination.

Evaluation Process

The Technology Services Department led a thorough requirement gathering initiative, engaging program teams across all AIU divisions to understand their specific needs and challenges. The team conducted an extensive landscape analysis of potential solutions, exploring over 20 different CRM platform solutions including open-source options such as SuiteCRM, highly customized solutions within the existing Microsoft environment (Dynamics), and leading commercial platforms like HubSpot, Salesforce, and specialized education-focused solutions.

Following this initial research, the AIU published a formal Request for Proposal (RFP) in September 2024 and received responses from multiple vendors. Three vendor solutions met the basic criteria for detailed review: HubSpot (with implementation partner Mole Street), Salesforce (with implementation partner Tectonic), and Pipeliner CRM.

During the initial evaluation phase, it became apparent that the original proposals were too broad in scope for effective Phase 1 implementation. The initial proposals included pricing for up to 1,200 users across the entire organization, which would have resulted in significant implementation complexity and cost. After eliminating Pipeliner from consideration due to limited education sector experience and partnership concerns, the committee requested streamlined demonstrations from HubSpot and Salesforce that focused on a more targeted use case approach.

Phase 1 Implementation Scope

The refined Phase 1 implementation, developed in collaboration with key stakeholders in December 2024, focuses on three specific use cases within the Teaching and Learning Division:

Waterfront Learning requires a classic sales and lead management implementation for their business-oriented programs, primarily focused on direct-to-district contracts with comprehensive quoting and invoicing integration. The system will support their contract management with Genius platform, website tracking capabilities, and summer program sales processes.

Continuing Professional Education (CPE) needs a blend of contact tracking capabilities for individual educators and district sales opportunities, including marketing automation and lead development features. The system will potentially replace their current Frontline registration system while supporting their work with districts, private schools, and charter schools across Pennsylvania.

Teaching and Learning Division (General) seeks lighter-touch engagement tracking and cross-functional information sharing between program teams regarding their consultation and support activities with school districts. This includes approximately 38 users across various departments who need to track professional development delivery, consultation notes, and district engagement profiles.

Internal & Shared Services also have a mix of requirements, including those teams that operate on a more entrepreneurial basis for fee-driven services such as MarCom, PAEducator and Technology Services. Other departments, such as Strategic Partnerships and Cultural Impact desire a more comprehensive engagement tracking tool.

Both HubSpot and Salesforce provided demonstration environments to AIU staff during the evaluation period, allowing key personnel to gain hands-on experience with each platform's functionality and assess fit for their specific needs.

Recommendation and Selection

The evaluation committee recommends the adoption of Salesforce as the selected CRM platform for the AIU's Phase 1 implementation. This recommendation is based on three primary factors:

- **Lowest Overall Annual Licensing Cost** - Salesforce demonstrated the most cost-effective licensing structure for the organization's needs.
- **Education Sector Focus and Experience** - Salesforce shows a strong understanding of the education sector with thousands of customers in the nonprofit and education space. The platform is currently in successful use by peer organizations including Appalachia Intermediate Unit 8 and Chester County Intermediate Unit 24, providing opportunities for knowledge sharing and best practice adoption. Salesforce has indicated a desire to organize a Pennsylvania Education User Group to support our implementations.
- **Comprehensive Requirements Fulfillment** - Salesforce best demonstrated the ability to meet all 13 functional requirements outlined in the initial RFP, including critical capabilities such as quote-to-agreement workflows, mass communication features, API access, and robust reporting. The platform also offers strong potential for future functionality expansion, including customer-facing portal capabilities through Experience Cloud.

Implementation Strategy

Pending board approval, the AIU will partner with Tectonic, an experienced Salesforce implementation partner with over 700 successful projects completed, to establish the initial CRM

system for approximately 60 licensed staff members. The 12-week implementation timeline includes discovery and design (2 weeks), build and quality assurance (6 weeks), user acceptance testing (2 weeks), and training/go-live support (2 weeks).

The implementation approach ensures the adoption of industry best practices and proper system configuration from the outset. The project team will include a dedicated project manager, solution architect, developers, and business analyst to ensure successful delivery.

The organization will continue collaboration with industry experts and other intermediate units by establishing a user group and exploring shared learning opportunities to maximize the value of the CRM investment.

Next Steps

Initial Implementation Phase

- Establish system administration responsibilities within the Technology Services Department, including designation of administrative-level accounts for CRM management.
- Identify program champions from each participating department to drive adoption and provide feedback to the implementation team
- Integrate Business Office support roles to provide business development assistance to program teams utilizing the platform
- Complete data migration from existing systems while ensuring data quality and integrity

Ongoing Development

- Monitor system performance and user adoption metrics through built-in analytics and reporting.
- Evaluate opportunities for expanded functionality and additional user licensing based on Phase 1 success.
- Assess potential for broader organizational rollout to additional divisions including Internal/Shared Services departments.
- Explore integration opportunities with existing systems including Oracle, Eventbrite, DocuSign, and WordPress.

This CRM implementation represents a significant step forward in the AIU's ability to enhance communication efforts with external stakeholders while supporting the organization's strategic objectives for improved operational efficiency and stakeholder engagement. The selected solution provides a scalable foundation that can grow with the organization's evolving needs while maintaining cost-effectiveness and ease of use for all stakeholders.