

LEADERSHIP PROFILE REPORT

**Heartland Area Education
Agency**

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EXECUTIVE SUMMARY

This report presents the findings of the Leadership Profile Assessment conducted by Hazard, Young, Attea & Associates (HYA) Dr. Ted Blaesing and Dr. John Perdue in September 2022 for the new Chief Administrator of the Heartland Area Education Agency (hereafter referred to as the A.E.A. or Agency). The data contained herein were obtained from input the HYA consultants received when they met with individuals and groups in either individual interviews or focus group settings and from the results of the online survey completed by stakeholders. The surveys, interviews, and focus group meetings were structured to gather input to assist the Board in determining the primary characteristics desired in the new Chief Administrator. Additionally, the stakeholder interviews and focus groups collected information regarding the strengths of the Agency and some of the challenges that it will be facing in the coming years. The online survey reflected similar and consistent views to those expressed within the focus group interviews.

Process

Following the Planning Meeting held with the Board, a search timeline and process for stakeholder engagement was determined. Jenny Ugolini and Agency leadership were charged with determining focus group participants, inviting them to remote sessions and scheduling focus group meetings. The following question prompts were asked of each group.

1. What do stakeholders value regarding the Heartland A.E.A.? What strengths do they desire to retain and build upon?
2. What are the issues the Agency currently faces, and, as importantly will be facing in the next three to five years?
3. What are the personal and professional characteristics you and Agency constituents expect a chief administrator to possess?

Once the focus group meetings were completed, an executive summary of feedback has been provided as well as feedback by constituent groups contained within this report.

Survey

The Agency developed their own survey for internal staff and superintendents of public and non-public schools. Survey participants including the Heartland staff (391); Superintendents, Public and Non-Public (26); and Board Advisory Council (BAC) Members (2) for a total of 419 respondents. Summary findings have been incorporated within the Leadership Profile Report and Desired Characteristics.

It is important to note that the top 3 abilities as ranked by survey participants showed strong agreement between staff and superintendents.

Staff ranked #1 and superintendents ranked #3. *"Promote and sustain an environment of mutual trust and openness with Board, staff and Member districts."*

Staff ranked #2 and superintendents ranked #1. *"Make data-based decisions that focus on the needs of students."*

Staff ranked #3 and superintendents ranked #2. *"Articulate and rally support for an organizations, mission, vision and values."*

When asked about the next Chief Administrator's role understanding, there was similar congruence of agreement.

Staff ranked #1 and superintendents ranked #2. *"The unique role of AEAs in Iowa: to assist diverse district in meeting their educational goals."*

Staff ranked #2 and superintendents ranked #1. *"Improving student achievement is the organizations primary goal."*

Staff ranked #3 and superintendents ranked #2. *"How to work with legislators on behalf of education."*

Finally, survey respondents were asked to rank attributes of the next Chief Administrator. The following top three were consistently ranked by staff and superintendents.

Staff ranked #1 and superintendents ranked #1. *"An excellent communicator and understand that listening is an essential component of communication."*

Staff ranked #2 and superintendents ranked #2. *"Committed to high standards for leadership, operations and student learning."*

Staff ranked #3 and superintendents ranked #3. *"A skilled systems thinker committed to growth and innovation."*

Engagement Participation

Participating groups and individuals for the focus groups included the following representatives: Heartland Board members, state-wide A.E.A. Chiefs, Superintendents, various Regional and Agency Planning Council members, non-public superintendents, classified and administrative assistants, and curriculum and special education directors. In total 82 individuals participated in the focus groups. A grand total of 501 individuals participated in developing the Leadership Profile Report with 419 survey participants in addition to the 82 individuals interviewed in the focus groups.

It should be emphasized that the data contained in this report are not a scientific sampling, nor should they necessarily be viewed as representing the majority opinion of the respective groups to which they are attributed. Items are included if, in the consultants' judgment, they warranted the Board's attention.

STRENGTHS OF THE AGENCY

The Heartland Area Education Agency is a lighthouse beacon for Iowa schools and nationally. Over many years, Heartland has earned the respect, admiration and high quality of delivering educational services to 53 public school districts and 30 accredited non-public schools across the greater central Iowa area. Frequently noted by contributors to this report was the outstanding reputation of the agency that has been earned over the past several years in part to the outstanding leadership provided by Dr. Jon Sheldahl and his predecessor Dr. Paula Vincent. This report would be remiss if it didn't include recognition of these two leaders and the roles they have played in creating a service culture based upon trust, professionalism and a customer first attitude.

Heartland Staff. It was very frequently noted by others how the staff at Heartland are truly outstanding. Many of the staff at the agency have long tenures in their roles providing a consistency of superior service. The long tenures also validate the excellent workplace culture that exists within the Agency. Simply put, Heartland is a desirable and pleasant place to work that values its employees. A desirable career destination has allowed Heartland to attract and retain a collaborative, team-centered group of professionals and support staff. Heartland's people make Heartland the exceptional Agency that it is.

Leadership. As noted above, it is clear that the agency has benefited from the leadership exhibited by Dr. Jon Sheldahl and his predecessor, Dr. Paula Vincent. Their leadership and the work of the staff have allowed Heartland to be recognized as Iowa's flagship A.E.A. and a premier provider of services across the state. The Agency is looked to for leadership in working with Iowa legislators, elected and appointed State and local officials.

The Agency Board is recognized as being collegial, working well together and providing the needed governance oversight. Many of the board members have long tenures on the board and understand the complexities and nuances of the Agency. Key administrators within Heartland are recognized for their expertise and team work in providing services to constituents of the A.E.A. and in many cases within the State of Iowa.

Systems of Support. A long history of developing fundamental and cutting-edge processes to assist school needs exists. A strong network of curriculum specialists, curricular content expertise and others within Heartland work with the Iowa Department of Education to bridge new expectations to best practice, innovative expectations and delivery of valued services to school districts. An oft repeated refrain is, "We leave a positive and lasting impact with families served."

Educational Services. Heartland has exemplary special education supports for member schools, families and children. Special education supports and services was a frequently noted asset of

Heartland. Professional development is abundant for Heartland staff who in turn deliver training to member districts. A full complement of media resources, teaching and learning specialists, interventionists, special education staff and other specialized educational services are provided by the Agency and Agency staff members.

Professional Culture. As noted above the culture within Heartland is exemplary. The organizational culture in Heartland is one of a trusting and respectful work environment. Employees support one another and often demonstrate care and concern for staff well-being. There exists a high degree of pride and trust in each other as Agency employees strive to be the best. It is obvious that a cooperative and positive partnership has been built among member districts.

CHALLENGES AND ISSUES FACING THE AGENCY

Like any organization, areas for continued and new opportunities for growth exist. Heartland is no exception. Throughout all focus groups, Heartland staff and others represented a keen sense of professionalism and appreciation for being able to offer insight on continuous improvement efforts.

Political Environment. The role of Chief Administrator is at the center of advocating for education and A.E.A. services with the state legislature. Recent politics in the State of Iowa has exerted pressure on education in general with some staff feeling attacked because they are educators, creating fear and uncertainty. Many participants indicated that public education is under attack in Iowa and that the legislature seemingly undervalues the service of the state's Area Education Agencies. It is incumbent for Heartland, being located in the state's capitol area, to be continuously aware and engaged in the changing educational philosophy influenced by politics and legislative action.

Funding and Organizational Threats to A.E.A.s. Recent trends in state funding have been under pressure from state and national economic indicators. Local districts are doing more with less at a time of greater stress among local educators. This creates additional pressure and need for resources from the A.E.A. to assist local districts. Recently, the state legislature has examined the restructuring of A.E.A.s across the state, creating a feeling of uncertainty and undervalue among staff. The need for long-term planning and communicating the valued services of A.E.A.s is paramount, not only to legislators but to local school district boards and constituent families.

Continued Support and Services. During the last two years of Covid, growing and immediate mental health needs have been apparent in member school districts as well as within the Agency. The size of school districts from the largest in the metro area to smaller districts in outlying and rural areas presents unique challenges in equity of services and delivery. Staffing allocation is a

continued need. While there has been staff turnover in less populated regions of Heartland, supporting A.E.A. staff both professionally and personally is an on-going challenge. Schools and A.E.A. staff report a continued focused need on providing social emotional learning services, responses to behavioral issues and appropriate interventions. Some staff have speculated if Heartland is moving fast enough to respond to changes occurring in member school districts. Efforts to communicate A.E.A. services to decision makers and area families is vital to the foundation and future of the Agency.

Staffing. Many staff members commented on high case load, fatigue, burnout and a “feeling like we’re living under a microscope.” These observations have created high levels of stress among Agency staff working in member districts. Staff turnover in smaller service areas is common for those wishing to locate to the Metro area. Recruitment and retention of qualified, high caliber staff, particularly in specialty areas (i.e. psychologists, physical therapists, etc.) remains a central mission. Rapid growth in some schools and/or districts has resulted in requiring additional A.E.A. services to be reallocated. Equity of service allocation is an on-going concern.

Diversity, Equity and Inclusion (DEI). Examining staff hiring and allocation from a diversity perspective is needed. Some commented on how the Agency needs to be reflective of the population with its staff who serve in a variety of diverse settings. DEI work has started but more needs to be done. Examining how to direct resources for all districts equitably remains a need. Building capacity and intentionality within Heartland on diversity of staffing, staff allocation relative to populations served and professional development remain fundamental.

Perception of A.E.A. focus by non-public school leaders. Only two of the invited non-public school leaders participated in the leadership profile interviews. This low participation rate could be interpreted as a relationship that is distanced. The two participants commented on what they perceived as an obvious bias of the A.E.A. leadership to be pro-public education and anti-non-public education. Heartland reports supporting 30 non-public schools and an effort to clarify the A.E.A. role in supporting these schools may be needed.

SUMMARY

The survey report and a draft of the Desired Characteristics are provided under separate cover and are meant to be stand-alone complementary pieces to the Leadership Profile Report.

HYA and the Board intend to meet the challenge of finding an individual who possesses most of the skills and character traits required to meet the needs of the Agency. The search team will seek a new Chief Administrator who can work with the Heartland A.E.A. Board to provide the leadership needed to continue to support member school districts in raising academic standards and student performance, while meeting the unique needs of each of its schools and communities.

The search team would like to thank all the participants who attended focus groups meetings or completed the online survey and the Heartland A.E.A. staff members who assisted with our meetings, particularly Jenny Ugolini who organized the search team's time and work. Finally, we recognize the Heartland Board for their high degree of collaboration in fulfilling a search process with integrity and commitment.

Respectfully,

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