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**MANAGEMENT  
and  
OPERATIONAL  
REVIEW**

Evergreen School District  
Administrative Operations Review

**On Site Visitation April 12-14, 2021**

Washington Association of School Administrators

Olympia Washington

Prepared by Dr. Gene Sementi

Delivered May 28, 2021

**WASA Management Review**  
**Evergreen School District**  
**Administrative Practices & Operations**

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## **Special Thanks**

The WASA Management Review Team would like to extend its most sincere appreciation to the central office staff of the Evergreen School District for their willingness and openness in sharing their thoughts through planning meetings and individual interviews. Engaging in a process that provides insights into the administrative operations, administrative interactions, and administrative organizational structure of a district is not an easy task. It requires courage, vulnerability, and a willingness to consider how to move forward successfully. The responses the review team received demonstrated care for, and loyalty to, the Evergreen School District, its students, and the greater community. With that in mind, the WASA Management Review Team offers its perspectives and recommendations found in this subsequent report.

Everyone who was interviewed throughout the review process took a great deal of pride in the Evergreen School District and in his or her own contributions to the students of the district. Everyone interviewed was thoughtful in their responses, were dedicated to their jobs, and were equally dedicated to the ongoing success and betterment of the district. Additionally, the Review Team is grateful for the district office staff's, especially Lori Strohl, detailed attention to ensuring all needs of the review team were met throughout the visit!

## **I. Introduction: About the Management and Operational Review Process**

The Washington Association of School Administrators (WASA) was contacted by the Evergreen School District regarding the possibility of carrying out a study of the administrative operations and structure of the district utilizing the Management Review format developed by WASA. Following discussion with the Chairman of the Board of Directors and the Superintendent, the district determined to have an on-site review carried out on April 12-14, 2021.

There will be readers of this report for whom the approach used in this kind of study may be unfamiliar. The section, The Four Phases of a Management Review, is included to introduce the design of the review process. A WASA Management Review is intended to provide an objective look at the current management and/or operational effectiveness of a district in particular focus areas and to produce a report that the district can utilize in planning for the future. The Association has developed the approach over an 18-year period and has carried out well over 100 studies in Washington and other states.

A review may be designed to address all major programs in a district or be focused upon a narrower program area. In this case, the Evergreen School District was interested in a thorough review of the administrative operations, administrative norms and communication processes and protocols, and administrative job responsibilities and titles both horizontally and vertically and subsequent recommendations for improvement for district consideration.

## **II. The Four Phases of a Management Review**

### **PREPARATION**

The initial portion of the review is that of planning. A plan is developed in concert with the school district that includes the specific goals and objectives sought. A review team is cooperatively selected and orientation for the team members provided. A meeting is held with key school district personnel to provide accurate input for the team and an introduction to what the review will involve for district employees.

### **ANALYSIS**

The analysis phase involves the on-site activity by the review team. Information is collected in the form of relevant school district policies, reports, documents, and other materials deemed appropriate in support of this process. In addition, interviews are conducted with administrators, staff members, board members, and other district employees, as appropriate. Where possible, and again, as appropriate, there are observations of actual activities within the school system.

### **EVALUATION**

An evaluation of the documentation, interviews, observations, and other information takes place next. This involves the members of the team in collective discussion and independent writing. The review is captured in a report that provides a comprehensive description of district functions with specific findings and recommendations.

### **REPORTING**

The final report is presented to the Chair of the Board of Directors and the Superintendent and the recommendations for improvement are explained. A presentation of key findings and recommendations to the entire Board may also be arranged. The report, in its entirety, provides a springboard for planning and positive direction for the school system. Each report is prepared in such a way that the positive strengths of the school district are acknowledged.

### **III. Executive Summary: Areas of Focus**

The summary below is intended to provide a brief indication of major points covered in the main report. Readers are urged to read the report in its entirety to gain a greater perspective on the work done during the management review process.

In March of 2021, a request was made to WASA to have an outside team look at the administrative operations, administrative norms, communication processes and protocols, and administrative job responsibilities and titles both horizontally and vertically within the Evergreen School District. As will be explained in greater detail in subsequent sections of the report, twenty-five individuals, representing a cross section of the district office leadership team from the Director level through the Board Member level were individually interviewed. Additional planning, entrance, and exit meetings were also held.

Prior to the on-site visit, the team reviewed documents including organizational charts from 2019-20 and 20-21, Superintendent Management Survey Results, Central Office Administrator Job Descriptions, Evergreen Schools Equity Lens (Draft), Board Docs review of Minutes from Recent Meetings, Board Docs Review of Policies and Procedures dealing with Board / Superintendent Relationship, Governance Culture, and Operational Expectations.

Several themes consistently emerged from the staff interviews with support from the document review. In virtually every case, individuals spoke with a great deal of pride about the district's responsiveness to the ever-changing needs of their students, staff, and community due to COVID-19. Most expressed how important the Evergreen School District is to the community, its students, and to them personally. There was a strong sense of pride in the work and responsiveness of individual departmental teams. Nearly everyone remarked about Evergreen's "student centered" approach to each employee's work.

The review team found that having gone through recent reorganizations at the district office leadership level has been personally challenging to most, troubling to many, and also a growth opportunity for many others. The reorganization has had the desired effect of focusing the work of district leadership around providing support for students and schools through the focused lens of the Teaching and Learning Department. This has been no small change and it will undoubtedly take a considerable amount of time to become systemically accepted and adopted.

Additional areas deserving the attention of district leadership team, that came to light during the staff interviews, fell within the broad categories of systems and structures that are having a negative impact on the overall culture and climate of the district office.

Throughout the interviews, it became clear that there is an absence of trust amongst a significant number of senior leadership, primarily horizontally between departments, but there was also some distrust vertically that extended to the Chief Officers and Superintendent. It is important to note that everyone had a small circle of trust, but that trust began to break down the farther from the circle they got, particularly outside of their department. Lack of trust is often, and unfortunately, coupled with fear and Evergreen is no exception. Due to a lack of trust, there are a number of employees that are fearful for their job security. This lack of systemic trust coupled with individual fear is having a chilling effect on climate and culture that is impeding the effectiveness of district office staff.

#### **IV. Management Review Team**

**Dr. Gene Sementi** recently retired following a thirty-one year career with the West Valley School District. While with West Valley Dr. Sementi served as an assistant principal, elementary principal, middle school principal, high school principal, was the assistant Superintendent of teaching and learning for seven years and finished his career as the Superintendent for eight years. Dr. Sementi was also an adjunct professor in the Washington State University Principal Preparation Program for eighteen years. Dr. Sementi was a founding member of the Eastern Washington Quality Schools Coalition that advocates for public education across the state and was a fixture in Olympia during legislative sessions. Gene also served on the WASA Legislative Committee and served as the NEWASA President.

**Dr. Greg Baker** became Superintendent of Bellingham Public Schools in July 2010. Prior to leading in Bellingham, he served as a deputy Superintendent for Portland Public Schools, as an intern and special assistant to the Superintendent of Boston Public Schools and as an administrator for Spokane Public Schools. He began his career in Alaska as a teacher and assistant coach. Dr. Baker earned his doctorate from Harvard University; a master's degree in administration, planning and social policy from Harvard University; a master's degree in secondary education from Western Washington University; and a bachelor's degree from Gonzaga University.

**Dr. Rebecca Miner** has served as the Superintendent of the Shoreline School District since 2014 and was previously the Superintendent in the White Pass School District. Her teaching, building administration and central office administration service has been in the Kelso, Vancouver and Washougal School Districts. She is currently an adjunct professor for the Washington State University Vancouver Principal's program and the Western Washington University Superintendent's program.

**Ms. Helene Paroff** is currently the WASA Inclusionary Practices Project Director after serving for six years as WASA's Assistant Executive Director for Professional Learning. Prior to coming to WASA, Ms. Paroff was the Assistant Superintendent for Student Learning and Support Services at North East Washington Educational Service District 101 based in Spokane, Washington for approximately eighteen years. While working at Erie I BOCES in New York State, Helene was actively engaged in the NYS School Quality Review process, which is similar to the WASA Management and Operational Review.



## V. Logistics of the Review

The plan for a review as outlined above involved the examination and study of documentary information as well as the on-site interviews of board members and central office staff of the school district. The list below represents a sample of the information requested for examination and reviewed for this project.

### Documents/Information Reviewed:

- Organizational Chart 2019-20
- Organizational Chart 2020-21
- Superintendent Management Survey Results
- Superintendent job description
- Evergreen Public Schools Equity Lens Draft
- Central Office Administrator job descriptions
- Board Docs Review of Recent Board Meeting Minutes
- Board Docs Review of Policies and Procedures on
  - Board / Superintendent Relationship
  - Governance Culture
  - Operational Expectations
  - Results

**Those Interviewed:** The onsite visitation included 30-60 minute in-person interviews with the following individuals:

<u>Mtg. #</u>	<u>Interviewee</u>	<u>Position</u>	<u>Meeting Type</u>
1. 3-23	Victoria Bradford, Mike Merlino, Lori Strohl, Helene Paroff, Andy Wolf, Gene Sementi	Board Chair, Superintendent, Executive Assistant, WASA Representatives	Planning Meeting
2. 3-26	Mike Merlino	Superintendent	Management Review Discussion
3. 4-12	Jenae Gomes	Chief Operations Officer	Standard Interview
4. 4-12	Scott Munro	Senior Director of Elementary Education	Standard Interview
5. 4-12	Susan Steinbrenner	Executive Director of Facilities	Standard Interview
6. 4-12	Mike Merlino Interview	Superintendent	Standard Interview
7. 4-12	Rob Perkins	Board Director	Standard Interview
8. 4-12	Victoria Bradford	Board Chair	Standard Interview
9. 4-12	Victoria Bradford & Mike Merlino	Board Chair & Superintendent	Entrance Meeting

10. 4-13	Jey Buno	Executive Director of Special Services	Standard Interview
11. 4-13	Tracy Thompson	Senior Director of Human Resources	Standard Interview
12. 4-13	Lori Strohl	Administrative Asst. to the Supt. and Board	Standard Interview
13. 4-13	Scott Eppinger	Senior Director of Facilities	Standard Interview
14. 4-13	Jennifer Jacobson	Director of Accounting and Purchasing	Standard Interview
15. 4-13	Yvonne Gaylord	Director of Transportation	Standard Interview
16. 4-13	Karen Fox	Director Title -1 LAP Programs	Standard Interview
17. 4-13	Barb Laurenzo	Director of Special Services	Standard Interview
18. 4-13	Catherine Carrison	Director of ELL	Exit Meeting
19. 4-13	Brian Grimsted	Chief Schools Officer	Standard Interview
20. 4-13	Bill Oman	Senior Director of Secondary Education	Standard Interview
21. 4-13	Shane Gardner	Director of Safety and Security	Standard Interview
22. 4-13	Julie Tumelty	Executive Director of Teaching and Learning	Standard Interview
23. 4-14	Derrick Deziel	Director of IT Operations	Standard Interview
24. 4-14	Klarissa Hightower	Executive Director of Equity and Inclusion	Standard Interview
25. 4-14	Robert Gardner	Director of Application Services	Standard Interview
26. 4-14	Cale Piland	Director Athletics/Activities	Exit Meeting
27. 4-14	Erin Lucich	Senior Director of Teaching and Learning	Standard Interview
28. 4-14	Gail Spolar	Director of Communications	Standard Interview
29. 4-14	Jennifer Misfeldt	Nutrition Services Director	Standard Interview
30. 4-14	Victoria Bradford & Mike Merlino	Board Chair & Superintendent	Entrance Meeting

## **Basic Interview Questions Asked of All Interviewees**

- What is your current role with the Evergreen School District and what about your work are you most proud of?
- The Review Team is here because your district leadership team wants to get everyone in the district office working as a highly effective team with the same goals and objectives. What are Evergreen's barriers to becoming a high functioning leadership team and how can those barriers be overcome?
- How, if at all, did the recent changes in the organizational structure impact the goal of becoming a high functioning leadership team?
- How, if at all, did the recent Evergreen Administrative Association survey impact your ability to do your job?
- Is there anything else you think we should know; anything else you'd like to share with us?

## **Overall Observations**

The information gathered from the review of documents and materials and the in-district interview process were synthesized into this report to give a neutral third party view of the effectiveness of the current administrative organizational structure and operations and to offer suggestions for the district's consideration. It should be noted that there were a range of responses from those who were unsure why Evergreen was engaging in an administrative management review to those who thought taking a deeper look at administrative structures and practices has been a few years in the making and were not surprised at all.

## **Suggested Resource**

While there are many references and resources available that address climate and culture, the WASA Management Review Team found the book, *The Five Dysfunctions of a Team: A Leadership Fable*, by Patrick Lencioni particularly useful in thinking about the dynamics that appear to exist in the Evergreen School District central office and contribute to its climate and culture. As noted, it is a step in the right direction that the Evergreen team is already reading it. Mr. Lencioni's book not only addresses the factors that negatively impact climate, culture, and the ability to perform at a high level as a team, but also offers processes to get the central office staff "back on track".

An Overview of The Five Dysfunctions of a Team Model by Patrick Lencioni (adapted from <https://www.tablegroup.com/download/the-five-dysfunctions-model-and-summary/> ) is included below.



“The true measure of a team is that it accomplishes the results that it sets out to achieve. To do that on a consistent, ongoing basis, a team must overcome the five dysfunctions listed here by embodying the behaviors described for each one. The above pyramid, the model described in the book, explains how one dysfunction leads to another and in the end, results in a negative morale of the team.

### #1 Absence of Trust

The bottom of the pyramid is the absence of trust, when team members are unable to show their weakness, resulting in being reluctant to be vulnerable and being open with one another. Team members will be afraid of admitting their mistakes and will be unwilling to ask for help.

### #2 Fear of Conflict

The lack of trust results in a fear of conflict that in turn results in team members incapable of engaging in debates or openly voicing their opinions. The team completely avoids conflicts that cause inferior results.

### #3 Lack of Commitment

The fear of conflict results in a lack of commitment. As team members have not bought into the decisions, they don't feel committed to the same, which results in an environment where ambiguity prevails.

#### #4 Avoidance of Accountability

This lack of commitment results in team members not holding themselves or their peers accountable. If one has not bought into the decision, they won't make their peers too accountable.

#### #5 Inattention to Results

When team members don't feel accountable, they put their own needs [ego, recognition, career development etc.] ahead of the team goals. This results in the team losing focus and the district/company suffers."

While by no means an exhaustive list, the WASA Management Review Team believes that addressing factors as described in the above literature will assist the Evergreen School District central office staff move to a common vision, achieve greater clarity about roles and responsibilities, and, thereby, experience greater cohesiveness and success as a team.

- *The Five Dysfunctions of a Team: A Leadership Fable* (Wikipedia)  
[https://en.wikipedia.org/wiki/The\\_Five\\_Dysfunctions\\_of\\_a\\_Team](https://en.wikipedia.org/wiki/The_Five_Dysfunctions_of_a_Team)  
*The Five Dysfunctions of a Team: A Leadership Fable* (Book Summary)  
<https://www.tablegroup.com/download/the-five-dysfunctions-model-and-summary/>

The Review Team was very pleased to learn that the Evergreen School District Leadership Team had recently begun a book study of *The Five Dysfunctions of a Team* and we believe that it is a great starting place for building a high functioning leadership team, but it is not an ending point. The district is encouraged to pursue some additional leadership training for its district office leadership team. A couple of avenues to pursue are the Washington State Leadership Academy through WASA and Improvement Science work through the ESD.

As noted previously, the final recommendations relate to administrative organizational structure and administrative operations as they support a positive learning environment for students and working environment for staff. Some of the suggestions may be in the form of questions to allow individuals and the collective group to reflect on its practices and potential areas to address.

The general challenges and recommendations addressed in this report include:

- Administrative Organization and Operations
- Administrative Norms
- Administrative Communication Processes and Protocols
- Administrative Job Responsibilities and Titles both Horizontally and Vertically

## **VI. The Report**

### **Overview**

At the time of this writing, the Evergreen School District has approximately 24,000 students – Pre School through 12<sup>th</sup> grade. There are approximately 1,650 classroom teachers and more than a fifteen hundred additional employees serving in the district in a variety of classified and administrative positions. The district arranged for this WASA Management Review out of its interest in gaining perspectives on the effectiveness of the current administrative operations, administrative norms and communication processes and protocols, and administrative job responsibilities and titles both horizontally and vertically and subsequent recommendations for improvement for district consideration from a neutral third party.

### **Process**

The Management Review started under the direction of WASA Assistant Executive Director, Mr. Andy Wolf, with phone calls with Evergreen’s Board Chair Victoria Bradford and Superintendent Mike Merlino. Once the focus of the review – administrative operations, administrative norms and communication processes and protocols, and administrative job responsibilities and titles both horizontally and vertically and subsequent recommendations for improvement for district consideration was established, Mr. Wolf contacted Mrs. Helene Paroff, also from WASA, and Dr. Gene Sementi, a recently retired superintendent, to lead the process on behalf of WASA. Dr. Sementi, Mr. Wolf, and Ms. Helene Paroff held subsequent conversations to clarify the purposes of the review. Dr. Greg Baker, Bellingham Public Schools Superintendent and Dr. Rebecca Miner, Shoreline School District Superintendent, were added to the Management Review Team based on their experience as longtime superintendents and played a role in every facet of this review.

After consulting with the Evergreen Superintendent and Board Chair the WASA Management Review Team examined documentation that would provide illumination of, and clarification to, the effectiveness of current administrative operations, administrative norms and communication processes and protocols, and administrative job responsibilities and titles both horizontally and vertically. The documents reviewed are mentioned in Section V above. Following the document review, thirty interviews/meetings of staff members and board members were conducted on April 12-14 of 2021. The results of those interviews are outlined below.

## **Strengths**

Everyone the Review Team interviewed was more than willing to share his or her story and point of view. Those staff members and Board members who were interviewed were very transparent and open as they answered our questions and shared their perspectives. We attributed this openness to the pride they take in the Evergreen School District and their desire to see it excel. The interview team saw the thoughtfulness of the interviewees as an indication of their individual dedication to the district, its staff, its community, and, most importantly, its students.

The interviews were quick to reveal that the staff takes a great deal of pride in their work in Evergreen and is extremely dedicated to the Evergreen district, community, and its students. It was not at all unusual for staff to have grown up in the Evergreen School District and to have chosen to live their lives there, work there, and raise their children there. It is a legacy that speaks well for the past, current, and future of the Evergreen School District.

By all reports the staff has done a great job throughout the pandemic of transitioning to remote schooling and subsequently transitioning to a hybrid model with Evergreen being one of the first districts in southwest Washington to begin serving students in person during the fall of 2020. Teachers and students were very flexible and quick to embrace online teaching technology while also making sure that students that struggle with connectivity also had access to education. At the same time, the district was able to launch and maintain a student-meal program that helped make sure students had access to meals almost from the beginning of the pandemic quickly and effectively.

The district was in the enviable position of being able to access funding to provide all students with 1:1 computers, making the transition to remote schooling smoother and more effective. The district is now approaching a point where they are at a 2:1 ratio of devices to student, making it possible for students to have a designated device at home while not depleting access to devices at school.

As mentioned earlier, everyone who was interviewed took a great deal of pride in their individual work with the Evergreen School District and their contributions to the success of the district. Everyone we talked to felt like their own departmental team was high functioning, hard-working, reliable, and trustworthy. The Review Team was also pleasantly surprised to learn how many members of the district's senior leadership team had grown up in in the Evergreen district and had chosen to come back to Evergreen to work and raise their families there. Employees went on to say that the district, including the district office leadership team, had a large number of highly skilled and very dedicated employees.

The Evergreen community has been extremely supportive of the district; this has never been more on display than the recent passage of one of the largest school construction

bonds in the state. This bond provided funding for a number of new schools to be built, a number of additional schools to be remodeled, and a number of additional schools to be modernized. The district has been excellent stewards of the public's trust and tax dollars throughout this process and has stretched the funding to construct more schools than initially planned. These new and updated schools are a great source of pride for the district, the community, and the students.

On the heels of the Legislature's resolution of the McCleary Lawsuit, Evergreen, like many if not most districts in the state, experienced a period of very strained labor relations. Ultimately the strains brought on by the settlement resulted in a strike in the Evergreen School District. Strikes are notoriously disruptive to labor/management relationships and the strain can linger for years. Evergreen's Superintendent, School Board, and various Union Leadership Teams prioritized rebuilding their working relationships and have done so effectively and quickly.

A point of strength and pride that was mentioned by many of the individuals interviewed from the Board, to the Superintendent, to the Executive Director of Equity and Inclusion, to other Senior Cabinet members and Directors was the creation of a Department of Equity and Inclusion. While most felt like Evergreen had historically kept pace with neighboring districts with Equity and Inclusion work, they also believe that the recent creation of an Executive Director of Equity and Inclusion position has propelled that work forward rapidly and effectively. To a person, everyone the team talked to is proud of this work, wants to be involved in this work, and is excited about the progress Evergreen is making.

A characteristic of any high functioning leadership team is a willingness to look inward and examine their effectiveness as they pursue their mission. Evergreen is certainly stepping up and looking introspectively at how they function as a senior leadership team. Inviting the Washington Association of School Administrators Review Team in to do a Management Review is one strong indicator of their desire to improve and excel. This introspection is evidence, from the perspective of the WASA Review Team, not only of a willingness to examine what's not working but also to make the changes necessary to realize the ongoing systemic improvement they seek.

One such step towards improvement, towards becoming a high functioning leadership team, is the recent book study undertaken by the district's senior leadership team of *The Five Dysfunctions of a Team* by Patrick Lencioni. Identifying challenges is the first step in overcoming those challenges and Evergreen appears to be dedicated to doing just that; identifying their barriers to high functioning team performance and working through those barriers.



## **Challenges and Recommendations**

**Challenge 1:** The individuals interviewed, to varying degrees, did not believe they were currently part of a high functioning leadership team. The greatest barriers to becoming a high functioning team were a lack of trust and its accompanying sense of fear. The lack of trust was most profound between senior departmental leadership and, at times, vertically from senior leadership extending to the Superintendent. This lack of trust is a relic of budget cuts, reorganizations, and a shift to central office leadership balanced on and flowing through the Teaching and Learning Department.

A significant number of leadership staff are fearful that another reorganization could/would lead to additional position eliminations and demotions. Several staff members remarked that they were confused about what exactly their current roles and accompanying responsibilities were.

### **Recommendations**

- Focus on the intention of change efforts and the promise of long-term dividends as opposed to shorter-term disruptions and impacts.
- The review team believes that Evergreen would be best served by a pause in major reorganization efforts. Not to say that staffing changes in the normal course of doing business can't be made, but major reorganizations should be paused until the current model has had time to settle in and become effective.
- Appointing staff members to senior leadership positions without following a formal Human Resources process is creating a lack of transparency and breaking down trust. Leadership positions should, at least, be opened internally and a process followed. When they aren't, it creates an appearance of decisions being made behind closed doors by a very small influential group.
  - Hiring needs to follow clear guidelines and expectations.
  - Hiring procedures have to be clearly spelled out, thoroughly communicated, and transparent.
  - Hiring practices, protocols, and procedures should be periodically reviewed for compliance and effectiveness.
- Stay the course with *The Five Dysfunctions of a Team* and, if possible, bring in an expert facilitator to lead the effort. This will free up district staff, including the Superintendent, to participate as team members on the journey to improvement.
  - Transparency and honesty need to be the first course of action.
  - Everyone needs to feel like they are clearly in the loop and are a valued member of the leadership team.
- Like most districts, the working relationship between the Superintendent and the Board is one that needs ongoing nurturing and support.
  - The Washington State School Directors Association provides training on Board / Superintendent relations.

**Challenge 2:** There is clearly a divide between in the district office between two factions, primarily at the senior leadership level. This division appears to be deepening and widening which is making it increasingly difficult for other leadership team members to stay above the fray; team members are increasingly feeling compelled to choose sides and the division is becoming more toxic.

### **Recommendations**

- Again, we urge the district to stay the course with *The Five Dysfunctions of a Team* and if possible, bring in an expert facilitator to lead the effort. This will free up district staff, including the Superintendent, to participate as team members on the journey to improvement.
  - Transparency and honesty need to be the first course of action.
  - Everyone needs to feel like they are clearly in the loop and are a valued member of the leadership team.
  - The district is also encouraged to pursue additional leadership training for its district office leadership team. A couple of avenues to pursue are;
    - Washington State Leadership Academy through WASA
    - Improvement Science through the ESD
    - Consultants from Patrick Lencioni's group
- One of the most important relationships amongst the district office staff is between the Superintendent and the Chief Operations Officer.
  - This relationship is currently strained and is contributing to a division on the district leadership team.
  - This relationship is critical to trust building across the leadership team.
  - The Review Team believes that every effort, up to and including bringing in a mediator, should be made to build a trusting professional relationship.
    - We believe this will be the start of a healing process that builds trust throughout the district office leadership team.
- Loyalty and dedication should not be to a person or faction. It should be to the vision, mission, and students of the Evergreen School District.
- Opening up and moving to a new district office building where everyone will be housed under one roof is going to provide an opportunity, to a degree, to wipe the slate clean and begin rebuilding teamwork and trust.
  - These types of opportunities don't come around very often. Take full advantage of this opportunity to re-launch a fully inclusive leadership model where everyone is valued, positive intentions are assumed, and trust is given.
  - The move to a new building is also an opportunity for the Superintendent to complete an entry plan to elevate more community, staff, and partner voices; this should not be left to an open door plan but should involve the Superintendent getting out to do this work personally whenever possible and virtually when not.

- After the entry plan is developed and operationalized the next step is to develop an easily articulated strategic vision and plan to get there.
- The Superintendent must be at the forefront of the work that focuses on building and re-establishing trust. This work is so critical that it must begin with the Superintendent, be championed by the Superintendent, and the Superintendent must forever be the face of the work.

**Challenge 3:** Building a culture of trust, or under the best of circumstances maintaining a culture of trust, is a big and ever present challenge for every large system including school districts. In a system, Evergreen for example, where trust needs to be rebuilt and a solid foundation of mutual respect and trust established Restorative Practices can be very useful.

### **Recommendations**

- Restorative Practices can be used within the workplace to both prevent conflict from happening and to address it when it does, enabling teams and individuals to work well together.
- Where trust is already broken, or there is perceived disrespectful behavior, or emotional and verbal abuse, or intimidation or bullying, etc., utilizing Restorative Practices can be an effective way to achieve resolution.
  - Restorative Practice includes
    - bringing together all those affected by conflict
    - providing a safe environment for the expression of emotions
    - allowing participants to come to a shared understanding
    - identifying creative ways to deal with conflict
    - providing opportunities to rebuild damaged relationships and strengthen teams
- Resources include:
  - Restorative Practices in the Workplace  
<https://robynshort.com/2018/10/15/restorative-practices-in-the-workplace/>
  - Restorative Practices Corporate Training  
<https://robynshort.com/services/corporate-training/>

**Challenge 4:** A contributing factor to the lack of trust amongst the cabinet is the organization of senior leadership meetings. The senior leadership meetings of the district office is organized into a Cabinet, an Extended Cabinet, a Teaching and Learning Cabinet, various Departmental Meetings, with some of the meetings having pre and post meetings. Who is invited to which of these meetings and when is not always clear, nor are the agendas, nor is the hierarchy of decisions made at each meeting.

## Recommendations

- The hierarchy of decision making for various leadership meetings should be very clear and transparent.
  - The people assigned to each meeting should also be very clear and transparent, and when possible should strive for inclusivity.
    - Guests should be formally invited as needed.
  - Agendas should be distributed ahead of time with an opportunity for additions and requests for clarifications.
- Have one leadership cabinet, double down on this group for key decisions/discussions. Rename other groups into lesser meetings; i.e. no instructional cabinet or extended cabinet; just one cabinet.
- There is a perception amongst many that there is a small inner circle of the senior leadership team that through pre and post cabinet and extended cabinet meetings controls the agendas and decisions, and that the actual cabinet and extended meetings are not decision-making meetings but information sharing meetings.
  - This lack of transparency is contributing to the general lack of trust amongst the senior leadership.
  - Bring in more voices when making critical decisions. Bring in the voices of those whose workload will be impacted by the decision.
  - When meeting invites are sent and placed on calendars, make sure they are accompanied with an email explaining the purpose of the meeting and ideally including an agenda.
    - Reduce wonder and confusion by those invited and not invited.

**Challenge 5:** A recent survey of principals and associate principals of the effectiveness of support they receive from district office staff was intended to provide actionable improvement information for district office leadership. While several staff members felt like the survey did just that, the majority of those interviewed felt that the survey was counterproductive at best and identified the following concerns.

- Many district office staff are involved in compliance and staffing work which often puts them in the position of having to tell school principals and associate principals “no”.
  - This could lead to district office leaders being less willing to hold building leaders accountable and risking being scored lower on a survey.
- There is a perception that district office staff in positions of having to say “no” more frequently scored lower on the survey.
- Concerns about manipulation of the survey (i.e. it is believed by some that administrators perceived to be beneficial to certain camps were encouraged to respond in a brutally honest fashion).

## Recommendations

- We recommend that surveying be paused for the time being.

- Before another effectiveness survey should be undertaken, there should be widespread buy in.
  - The survey itself should either be purchased or administered by a 3<sup>rd</sup> party or developed by a broad subcommittee of the senior leadership team.
  - The results must be anonymous and the subjects of the survey as well as the survey takers have to be confident in that anonymity.
- Survey results should not be used as a source for evaluations.
  - Survey results of this nature are most effective when used for self-reflection and self-improvement.
  - An evaluation component is very threatening and counterproductive.

**Challenge 6:** It can't be understated here that the COVID-19 pandemic was very disruptive for every school system in the state and Evergreen was no exception. In addition to the pandemic, Evergreen had recently gone through a strike, had made budget cuts that reduced staff, had brought in a new superintendent mid-year, and had gone through two major reorganizations.

#### **Recommendations**

- Take some time to celebrate all that you've accomplished over the past few years.
- Make sure that all district office leadership staff, and all staff for that matter, are aware of the availability of the Employee Assistance Program.
- Be very selective regarding new initiatives for the next school year to give district office staff the time and support they need to excel.
  - You have made remarkable progress over the past few years, but the price for that progress has been a steady grind on your leadership team. They are exhausted and beginning to break down.
    - This break down is manifesting itself in terms of a lack of trust and systemic fear.
  - Assume positive intention from all and extend the same level of grace to everyone that you hope to have extended to you.

**Challenge 7:** Several staff members remarked that there is no clearly articulated vision and mission. Individual staff members have their own vision and are committed to their own missions but there is a lack of a systemic and overarching vision and mission.

#### **Recommendations**

- Consider undertaking a Strategic Planning process.
  - Bring in a facilitator to oversee the process.

**Challenge 8:** Nearly every staff member interviewed stated that the Superintendent was a highly skilled Chief Financial Officer and that his having spent twenty years with the district has provided invaluable institutional knowledge and experience. The Superintendent position and the CFO position in a district the size of Evergreen are very demanding jobs, for one person to do both does not seem optimal. Years of experience in finance, even at the highest of levels, may not be the best training experience for the superintendency. The district could also benefit from having some of its senior cabinet members, who in many districts would be considered Assistant Superintendents, receive additional leadership training.

### **Recommendations**

- To more completely develop his educational leadership skill set the Superintendent is encouraged to consider:
  - pursuing either a superintendent's credential or a degree in educational leadership.
  - working with a leadership coach/mentor.
    - The Review Team would be happy to recommend potential Leadership Coaches.
    - It might also be possible through contacting Patrick Lencioni, the author of *The Five Dysfunctions of a Team*, to arrange for a leadership coach for the Superintendent.
- It is admirable that through a difficult financial stretch that the Superintendent retained his duties as CFO the past two years. That said, it seems that from a systemic leadership need, it is time to split those positions and hire a CFO.
- Transitioning from CFO to Superintendent in a district where one has worked for over twenty years has definite advantages and disadvantages. One of the greatest advantages is institutional knowledge and supportive relationships. One of the disadvantages is that positional advancement often requires a shift in how the new Superintendent interacts with colleagues.
  - Previous informal language that may have been seen as acceptable banter between peers can quickly be seen as unacceptable and disparaging to subordinates.
  - It is important to remember that everyone expects their superintendent to be the epitome of professionalism in their language, actions, and relationships.
- Encourage senior leadership staff, and those on that track, to pursue additional educational leadership training and possibly a superintendent's credential. It would not be unusual for a district the size of Evergreen to have six or more senior leaders who have completed superintendent preparation programs.

**Closing Thought:**

It is inherent for management reviews to focus on the challenges facing a district and recommendations for navigating around and through those challenges. It is important to remember that every district, no matter how effective, has challenges that it is currently facing as well as challenges that the future will bring; Evergreen is certainly no exception. That said the Management Review Team would like to close by saying that the challenges facing Evergreen are not insurmountable. Evergreen has a talented, dedicated, and committed staff that is certainly capable of succeeding in the face of these challenges and they have a School Board and Superintendent committed to leading them through this difficult work.

The Superintendent and Board are optimistic about the future of Evergreen and are committed to embracing that future with their very talented district office leadership team. The Superintendent and the Board understand how pivotal their roles are as they strive to establish a high functioning leadership team in the district office that is built on a foundation of trust and dedication and realize that they must collectively hold themselves accountable for achieving this lofty and noble goal. Evergreen has a bright future ahead largely due to the support of the community and the commitment of a very dedicated and talented staff.