



HARDWIRING EXCELLENCE IN YOUR ESA

DR. KAREN WENDORF-HELDT, CESA 9

DR. MELISSA MATARAZZO, STUDER EDUCATION

LEARNING INTENTIONS FOR OUR TIME TOGETHER

In hearing OUR story, you will...

- Appreciate intentionality and its impact on evidence-based leadership practice
- Identify leadership strategies that may help you hardwire excellence in your organization
- Leave "unsettled" and therefore motivated to lead your next steps in YOUR story







Achievement of Results

Lucky

High results, low understanding
of antecedents
Replication of success unlikely

Leading

High results, high understanding
of antecedents
Replication of success likely

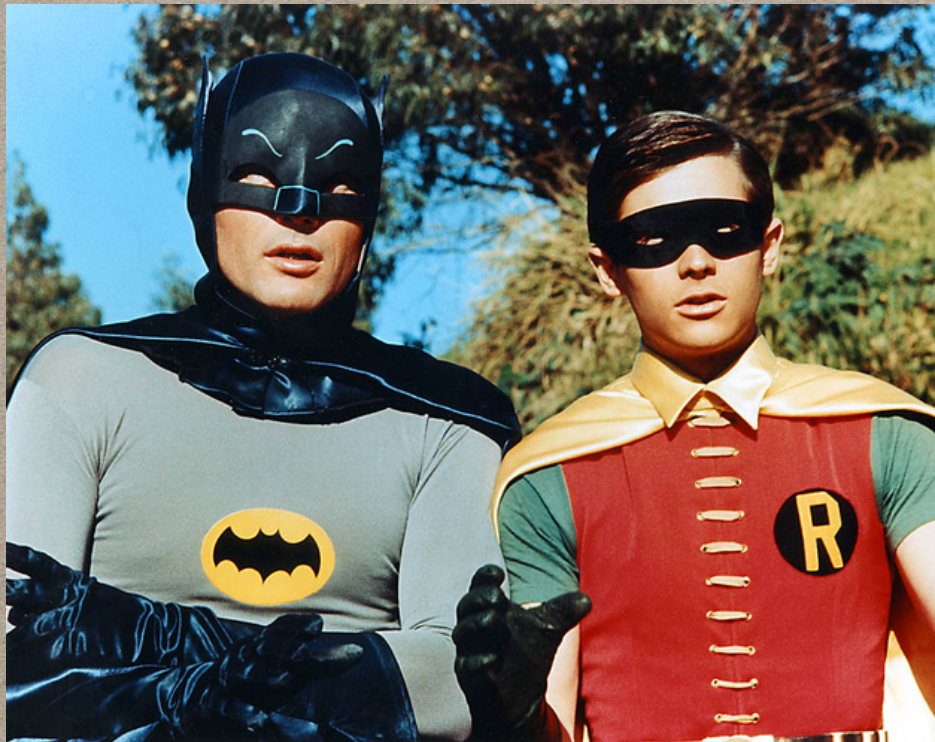
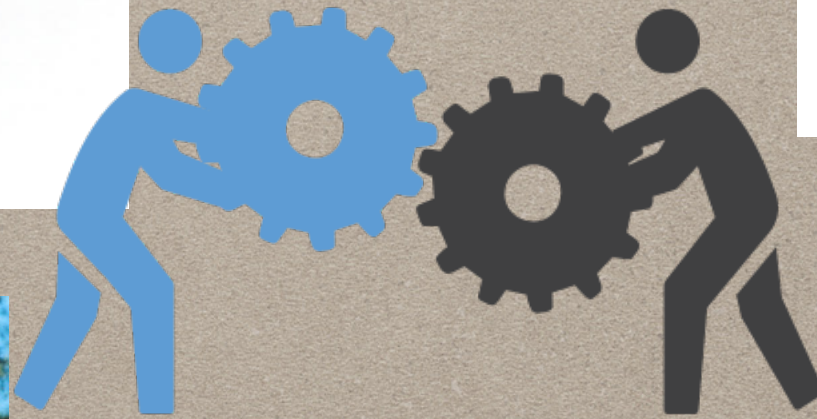
Losing

Low results, low understanding
of antecedents
Replication of failure likely

Learning

Low results, high understanding
of antecedents
Replication of success likely

Antecedents of Excellence







StuderEducation

EXCELLENCE IN EDUCATION

Knowing

Doing

Coaching Support to Close the Knowing-Doing Gap

In the beginning.



S. GROSS
CN
COLLECTION

"My question is: Are we making an impact?"

HOW DO YOU KNOW?

TURN AND TALK

MOVING BEYOND "CARDIAC ASSESSMENT"

"WE FEEL WE'RE
DOING A GOOD
JOB...IN OUR
HEARTS"





**There is nothing new under
the sun, but there
is something old we
do not know**

~ Laurence J. Peter ~



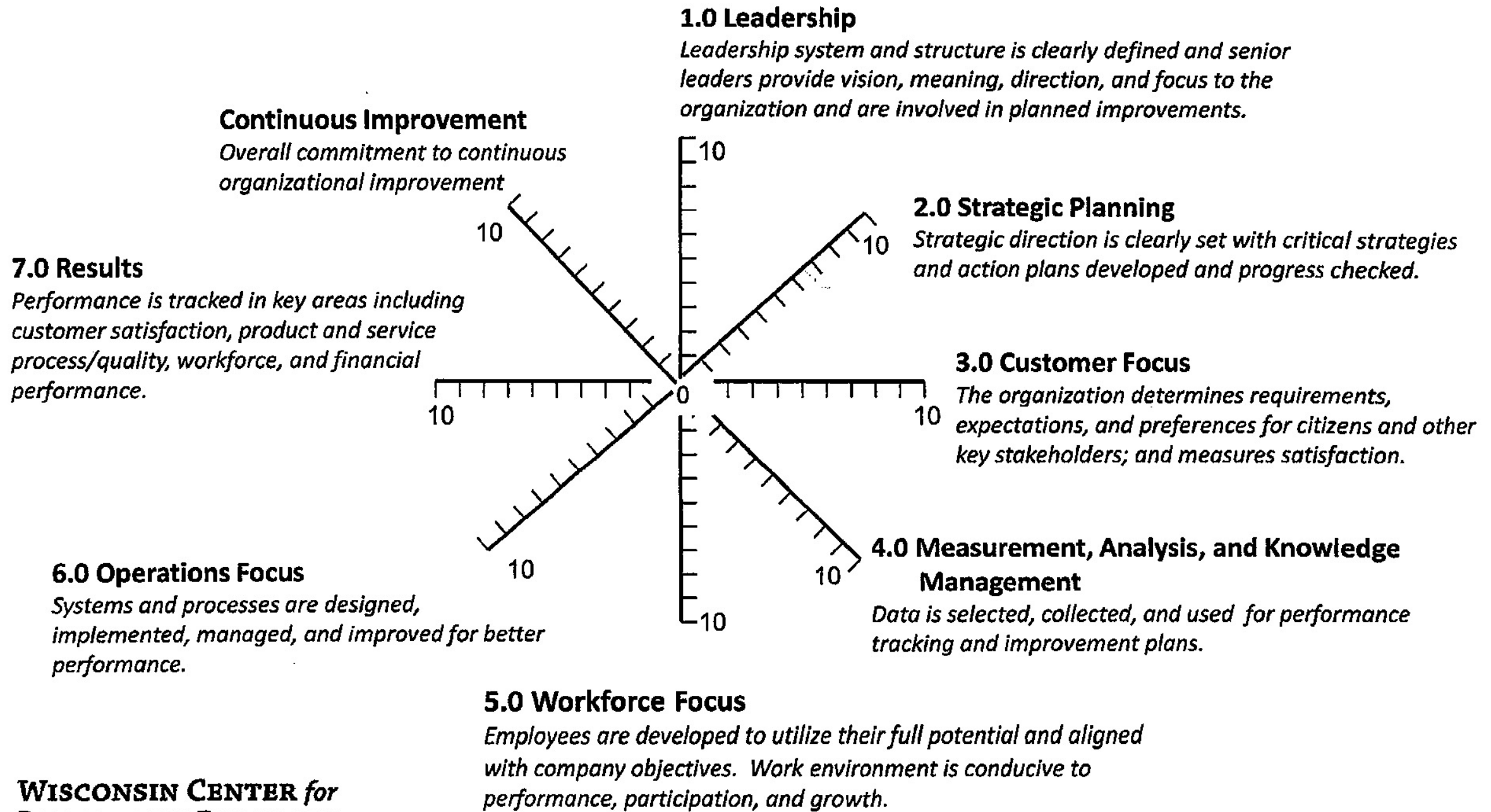
Baldrige Criteria for Performance Excellence Framework



Performance Excellence Assessment

Activity

Reinvention



WISCONSIN CENTER for PERFORMANCE EXCELLENCE
Better Organizations, Better Results

EVIDENCE-BASED LEADERSHIP

- Aligned Goals
- Aligned Behavior
- Aligned Processes



Nine Principles®

- 1. Commit to excellence**
- 2. Measure the important things**
- 3. Build a culture around service**
- 4. Create and develop great leaders**
- 5. Focus on employee satisfaction**
- 6. Build individual accountability**
- 7. Align behaviors with goals and values**
- 8. Communicate at all levels**
- 9. Recognize and reward success**

**WHEN YOU
THINK OF
GETTING
BETTER AT
WHAT YOU
DO...**

WHAT ARE YOUR
GREATEST
CHALLENGES?





Don't try to fix me,
I'm not broken.

WHAT'S YOUR WHY?

Continuous Quality Improvement



WHY?



Capacity Building



improvement
engagement
learning
satisfaction
success
growth



WHAT'S YOUR HOW?

Continuous Quality Improvement



FROM STRATEGIC DIRECTIONS TO HOW WE DO BUSINESS

- Know our customers
- Make sure our customers know us
- Continuously strengthen our service design (improve and innovate)



WHAT'S YOUR WHAT?

Continuous Quality Improvement



Characteristics	Mean 11/2015 (N=41)
Accessibility	4.46
Accuracy	4.56
Attitude	4.62
Operations	4.53
Timeliness	4.52
Overall Mean	4.54

Engagement Items	12/2015 (N=29)	Pct. Rank
1. My supervisor(s) provides me good processes and resources to do my job.	4.48	99
2. My supervisor(s) provides feedback on my strengths as an employee.	4.59	99
3. Supervisor led team meetings make efficient use of time and are productive.	4.10	74
4. My supervisor(s) recognizes good performance.	4.72	99
5. My supervisor(s) demonstrates a genuine concern for my welfare.	4.76	99
6. My supervisor(s) makes the best use of available funds.	4.37	98
7. My supervisor(s) consults me on the decisions that affect my job.	4.07	94
8. My supervisor(s) sets clear expectations for judging my performance.	4.48	99
9. My supervisor(s) provides the support needed to accomplish my work objectives.	4.21	90
10. My supervisor(s) provides feedback concerning areas for improving my performance.	4.21	97
11. The agency administrator manages organizational finances effectively.	4.44	99
12. The agency administrator uses a variety of methods to promote effective communication throughout the organization.	4.55	97
13. The agency administrator makes decisions in the best interest of the organization.	4.59	99
14. If given a choice, I would recommend that a school district select this organization for support.	4.79	99
Overall Agency Mean	4.46	99

Student Achievement	Quality Service
Long-Term Goals	
In CESA #9 School Improvement Services member districts, student learning increases and achievement gaps decrease.	Districts and community agencies recognize CESA #9 as a valuable resource providing high quality programming and service.
Annual Results Measures	
<ul style="list-style-type: none"> ● Increase % of schools meeting or exceeding expectations on school report cards from 94% to 95% (No data – school report cards not issued in 2015-16) ● Increase the completion rates of online students from 87% (2014-15) to 89%. (Data not yet available) 	<ul style="list-style-type: none"> ● Maintain workshop evaluation recommendation rate above 95% (97.8%, May 2016) ● Maintain Support Services mean above 4.5 (4.59, April 2016) ● Maintain or increase district utilization of CESA 9 services (Gathering baseline data) ● Maintain or increase participation in professional learning (2015-16 = 4381) ● Increase the number of school districts and schools utilizing WVS services by 5% (Districts 7.4% increase; Schools 7.1% increase, May 2016)
Progress Monitoring Measures	
Validation protocol Status Check (SOAR schools)	Support Services Survey Workshop Evaluations Quarterly participation in professional learning (in house and in district) and purchased services
Strategic Actions (all)	
<ul style="list-style-type: none"> ● Embed ourselves with the educators we serve to continuously improve classrooms, schools, and districts ● Develop a consistent process to communicate internally who is working on what and when with each of our districts ● Develop a protocol for validating implementation of topics we teach 	<ul style="list-style-type: none"> ● Provide excellent service in every interaction we have with our customers ● Round w/ our customers ● Market the benefit of CESA 9 through purposeful, brief interactions and public relations



Action Steps from Results Roll Out

for Continuous Innovation and Improvement

District Services Survey (Goal: 4.5 or higher on overall mean)

- **Accessibility:** Karen will create a spreadsheet for receptionist and program assistant reference outlining each director/administrators preferred method of being reached when not in the office.
- **Accessibility:** CESA staff will respond to voicemail and email requests from customers within 24 hours (one business day) unless on vacation, leave or on non-contract day.

Employee Engagement Survey (Goal: 4.5 or higher on overall mean and 4.15 on Q3-meetings and 4.12 on Q7-decisions)

- **Q3 Meetings:** Karen will restructure our staff meetings to address:
 - Purpose of meetings in general and specific intentions for each meeting
 - Move to a new format-rolling agenda with notes and evaluation of meeting
 - Move all-staff meeting to afternoon so it is held *after* monthly School Improvement Leadership Team (SILT) meeting so that SILT team can determine focus for Information Sharing and Opportunity for Feedback on all staff agenda
- **Q3 Meetings:** At Back-to-School Kickoff, each employee will be provided a template and will write a brief narrative that captures professional and personal highlights. Karen (and Jenny) will use these bios to publish a staff directory and will post "getting to know CESA 9 staff" on our social media accounts
- **Q7 Decisions:** All staff will be intentional about asking each other, "What do you think about this?" to provide expanded opportunity for input, feedback, and solution across the Agency

Rolling Staff Meeting Agenda

Our Mission

To provide leadership for educational improvement and strengthen educational institutions' capacity to educate all students creating healthy, resilient, successful adults

Our Vision

To contribute ongoing leadership for innovative and qualitative growth to ensure optimal educational opportunities for all children

Strategic Directions

Know our customers better
Have our customers know us better
Strengthen our service design

Pillar Results

Student Learning
 Service
 People
 Finance
 Growth & Innovation



Abs:

October 17, 2016	Prior Meeting Overall Rating: 4.42
1:00-2:15 pm	Notetaker:
Meeting Intentions: <ul style="list-style-type: none"> • Celebrate and build organizational culture • Learn to practice good handovers • Be "in the know" about upcoming CESA work/events 	
Prepare for This Meeting: <ul style="list-style-type: none"> • Read chapter 24 in "The Great Employee Handbook" pp. 157-163. Come ready to share your responses to these questions: <ul style="list-style-type: none"> ○ Why are good handovers important? ○ What are strategies to ensure good handovers? ○ Do you have a handover experience to share? What made it good or not so good? 	
Connecting to Purpose and Celebrations (1:00)	
<ul style="list-style-type: none"> • SHARING OUR STORIES OF SERVICE & SHOUT-OUTS <ul style="list-style-type: none"> ○ WOW! ○ Board Share ○ Your Stories (from ACP workshop-Lynn, from literacy series-Casey) 	
Capacity Building and Leadership Development (1:05)	
<ul style="list-style-type: none"> • Discussion of Chapter 24 (see questions above) 	
Connecting Our Work	
<ul style="list-style-type: none"> • Update on Academic and Career Plans (ACP)-Fred/Lynn • Share Information and Provide Feedback-Departments Share Most Important Work and Seek Input <ul style="list-style-type: none"> ○ Workshop evaluation updated form for single events ○ CESA 9 Excellence in Teaching Program-alternative pathway to licensure-application 	
Notes from Today and Future Agenda Planning	
<ul style="list-style-type: none"> • FYI: <ul style="list-style-type: none"> ○ Christmas and New Year's Office Closing Plans ○ Skyward Training Opportunity ○ WEA Trust Vitality Opportunity • BOC Update: October meeting-colors inventory • PAC Update: October meeting-Future Ready (Archie), SI & DPI Updates (Al), Legislative Conversations • Items for Upcoming Meeting Agenda: <ul style="list-style-type: none"> ○ Exploring Bias Activity ○ Employee Assistance Program • Please complete this brief exit slip. 	

Shared Commitments

We collaborate to design services that meet or exceed customer needs.

We are prepared, ready to learn, and thoughtfully engaged.

We "manage up" to contribute to a trusting, respectful, supportive work environment.

We communicate our perspectives and listen to understand other perspectives.

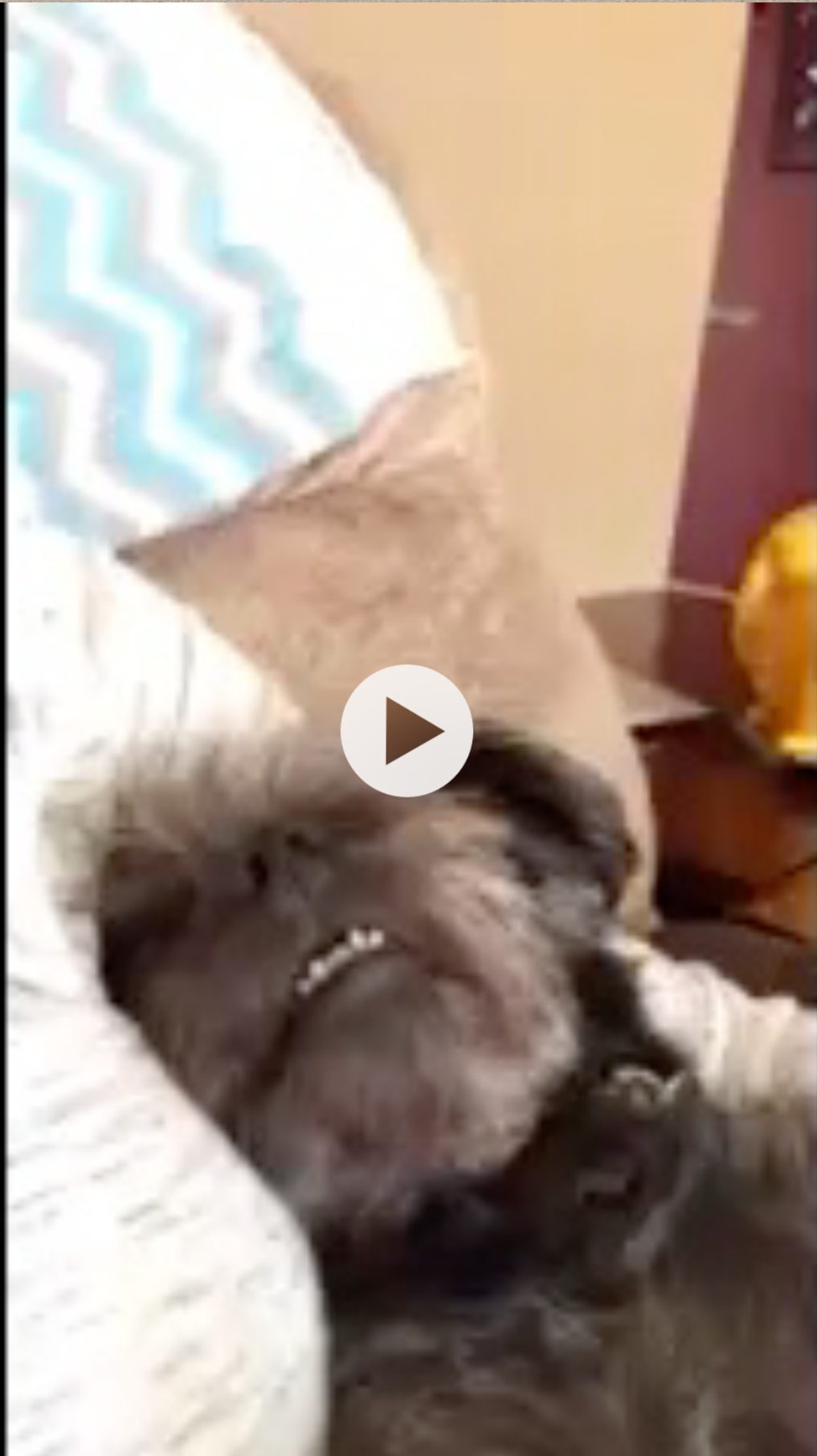
We follow through with purposeful actions.

We are reflective and celebrate excellence.

We integrate our individual strengths--striving for continuous improvement and innovation.

FYI – for information only. Decision is already made.
INPUT – for discussion, feedback, opportunity to impact decision.
DECISION – need to make a decision now.

Characteristics	Mean 11/2015 (N=41)	Mean 4/2016 (N=47)
Accessibility	4.46	4.58
Accuracy	4.56	4.61
Attitude	4.62	4.68
Operations	4.53	4.55
Timeliness	4.52	4.56
Overall Mean	4.54	4.59



- **P** (positive)
- **M** (minus)
- **I** (intriguing)

WHAT'S GETTING HARDWIRED INTO OUR ORGANIZATIONAL DNA?

- Manage up
- Rounding
- 30/90 day check-ins
- Shout outs
- Thank you
- Coach and connect
- Measure success
- Results rollout
- From difficult to doable (stub your toe)
- Process articulation

THE
**GREAT
EMPLOYEE
HANDBOOK**

Making Work and Life Better



Quint Studer

Rounding Summary Report

Date: April, 2016

To: PAC

From: Karen Wendorf-Heldt

Rounding Summary from Spring Visits with Superintendents

What do you value most about CESA 9?

- Professional development support, quality opportunities for new learning
- Leadership support
- Sharing of resources and advice
- Knowing I can contact people and get answers to my questions
- How quickly staff respond, great communication
- When we need something, we know someone will be there
- Connections, networking
- Collaboration opportunities
- Staying on the cutting edge, staying up-to-date and in-the-know
- Cooperation—we can't do things all by ourselves—we look to CESA to be the experts in those areas
- Serving as the intermediary between us and the DPI
- Really value the great people who have been hired—it's the best since I've been in CESA 9 region
- Strong emphasis on teaching and learning across the board (PAC, networks, consortia, etc.)
- Proactive support with initiatives (Educator Effectiveness, Personalized Learning, initial educators, etc.)
- Legal updates, opportunities to develop relationships with legislators and influence policy
- Awareness of best practices
- Staff are professional yet down-to-earth, pleasant
- All the work to support school improvement
- Grant writing opportunities
- Flexibility—the willingness to do whatever it takes, responsive to our needs
- Staff coming out to our district
- Webinars

What is one thing you'd like us to do better or differently or start doing that we're not currently doing?

- Create a list of what the things are that CESA 9 staff can do/provide
- Help connect our people to the professional development opportunities-marketing
- Food service and business managers (help providers in districts to network regionally)
- Mental health services-support for high behavior needs
- Expand alternative education opportunities for students (like the NAC/NAC NP elsewhere)
- Keep focusing on student learning
- Help with part time staffing needs-interventionists?
- Showcase other district practices

- Provide after hours and weekend trainings so staff don't have to miss student contact time (tried, staff don't come with the exception of PDP Writing Workshop, Northwoods Paraprofessional Summit, and classes for advanced degree/licensure)
- Provide a pathway to alternative licensure
- Help with HR/policy development
- Communication Services
- Job Fair

What do you value about PAC meetings?

- Networking with and advice from colleagues in my role
- Legal updates from Mike Julka
- Book study opportunities and blended learning format
- Learning from other people's experiences—their best practices and their next (innovative) practices
- Having special guest speakers
- Understanding different perspectives (smaller rural schools, larger suburban schools)
- Help with unpacking some of the initiatives from DPI/legislature
- Dialogue and conversation, table talk
- Just-in-time nature of updates and communication
- Updates from state organizations (SAA, WASDA)—could create more opportunities for input on what is ahead
- Sharing of resources and ideas-collaboration
- Sharing HR practices and problems
- Hearing what professional development opportunities are coming up at CESA 9 for us and for our staff (having handouts to hand out when I get back to the office)
- Variety in the agenda
- I always come away with a new idea or a new "aha!"
- We all get along, play nice and are willing to help each other
- Opportunities to build relationships with legislators and influence policy development
- It's like our own little mini-convention once a month
- Keeping the focus on kids and their learning—we are like-minded in that approach

Learning needs for 2016-17

- Revisit compensation models, salary plans
- Katie Rainey, John Forester, Jon Bales
- Evidence-based policy agenda
- Mental health
- Continued innovations and pedagogy, digital integration
- Personalized approach to continuous learning for superintendents
- Staffing needs and options
- Julka updates
- Co-teaching
- Interest rates/district investments, etc.
- Biennial budget
- Early childhood development (Baby Business-Rob Grunewald from MN)
- Our development and growth as leaders
- Autism-more independent learning environments for learners with autism
- Whatever's trending-cutting edge information
- ESSA as it unfolds
- Maggie Beiber (host a round table with key stakeholders on how to strengthen the profession—attract educators)
- Assessment literacy
- Idea to get more legislators to participate in our every other month events
- Idea to move PAC meetings to districts from time to time

be better
than you were
yesterday.

CESA #9 School Improvement Leadership Team Performance Feedback

Staff Member:

Date:

PEOPLE

Leadership

- ✓ Provides effective leadership in areas of responsibility
- ✓ Dedicates time and resources to own professional learning to enhance leadership skills
- ✓ Provides learning opportunities for educators and educational leaders
- ✓ Facilitates effective meetings
- ✓ Makes recommendations to the Agency Administrator in areas of work
- ✓ Consistently demonstrates servant leadership in thought and action
- ✓ Contributes to leadership at the regional, state, and national levels

Evidence & Comment:

Employee Reflections: Highlight here and enter text.

Supervisor Reflections: Highlight here and enter text.

Customer Focus

- ✓ Accessible and responds appropriately to customer need and in a timely manner
- ✓ Develops and maintains good working relationships with customers
- ✓ Keeps customers informed of programming in areas of responsibility
- ✓ Routinely monitors customer satisfaction through rounding, review of program evaluations, district services survey data, and other sources of feedback/data
- ✓ Promptly addresses issues and concerns that may develop
- ✓ Models a solutions-focused mindset
- ✓ Seeks feedback from customers to understand emerging service needs

Evidence & Comment:

Employee Reflections: Highlight here and enter text.

Supervisor Reflections: Highlight here and enter text.

Workforce Focus

- ✓ Holds high expectations for his/her own performance
 - ✓ Demonstrates competence

Supervisor Reflections: Highlight here and enter text.

PROCESS

Operations Focus

- ✓ Operates in accordance with Board policies
- ✓ Works to provide quality service in the most cost-effective manner possible
 - ✓ Secures resources and support needed to accomplish priority work
 - ✓ Ensures good stewardship of resources
- ✓ Communicates effectively (i.e. brings issues to the attention of administration, has the difficult conversations with co-workers as needed--talks to people not about people)
- ✓ Completes tasks thoroughly, accurately, with high quality and attention to detail

Evidence & Comment:

Employee Reflections: Highlight here and enter text.

Supervisor Reflections: Highlight here and enter text.

PLANNING

Strategic Planning (and Acting)

- ✓ Understands customer needs, Agency needs and plans work accordingly
- ✓ Contributes to vision and direction within the organization; collaborates with co-workers and other partners
- ✓ Prioritizes work to successfully manage multiple tasks
- ✓ Anticipates work ahead and plans accordingly

Evidence & Comment:

Employee Reflections: Highlight here and enter text.

Supervisor Reflections: Highlight here and enter text.

PROGRESS

Measurement, Analysis, and Knowledge Management

- ✓ Knows and promotes the broader scope of Agency services
- ✓ Routinely collects, analyzes data to monitor impact of and guide decision making
- ✓ Keeps Agency Administrator informed of progress related to goals and impact of the programming and service within areas of responsibility
- ✓ Actively investigates and researches advances, trends, and emerging practices
- ✓ Shares best practice and successful strategies with others to strengthen capacity

Evidence & Comment:

Employee Reflections: Highlight here and enter text.

Supervisor Reflections: Highlight here and enter text.

CESA #9 Organizational Scorecard 2016-17

Student Achievement	People	Quality Service	Finance & Operations	Growth & Innovation
Long-Term Goals				
Student learning increases and achievement gaps decrease in school districts served by CESA #9.	Employees recognize CESA 9 as a great place to work.	Districts recognize CESA #9 as a valuable resource providing high quality programming and service.	CESA 9 operations are lean and fiscally stable.	CESA 9 is a dynamic organization—responsive to emerging needs and changing educational landscape.
Annual Results Measures				
Increase % of schools meeting or exceeding expectations on school report cards from 94% to 95%* <i>*may need to establish new baseline as report cards will change again for 2015-16 due to another new state assessment and new ESSA requirements</i>	Maintain Employee Engagement mean score 4.5 or above	Maintain workshop evaluation recommendation rate above 95% Maintain District Services mean score 4.5 or above	Fund balance covers monthly fluctuations to avoid short term borrowing	Three to five new or enhanced services are identified each year across the Agency
Progress Monitoring Measures				
School Report Cards	Employee Engagement Survey	District Services Survey Workshop Evaluations Rounding Summaries	Monthly Reports & Board Audits of Agency Financial Statements	Annual Report Documentation
Strategic Actions				
*Embed ourselves where possible with the educators we serve to continuously improve schools *Communicate internally who is working on what and when in our districts	*Round with employees *Shout Out-celebrations *Communicate thanks *Check-in	*Be accessible to customers- 24 hour response time *Provide excellent service in every customer interaction *Round with customers *Market the benefit of CESA #9 services via CESA 9 APP, social media, & email informational blasts	*Meet regularly with project directors-budget & HR oversight *Articulate and communicate purchasing procedures to ensure best use of Agency funds *Use workshop checklist to plan and prevent loss	*Align employee & department goals via the evaluation system *Determine strategies for improvement and innovation within programs & departments

CESA #9 Employee Goals

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Quality Service

Long-Term Goals

AGENCY:
Districts recognize CESA #9 as a valuable resource providing high quality programming and service.

EMPLOYEE/DEPARTMENT:

Annual Results Measures

Maintain workshop evaluation recommendation rate above 95%

EMPLOYEE/DEPARTMENT:

Maintain District Services mean score 4.5 or above

Progress Monitoring Measures

**District Services Survey
Workshop Evaluations
Rounding with Customers**

EMPLOYEE/DEPARTMENT:

Strategic Actions

***Provide excellent service in every interaction we have with customers
*Rounding with customers
*Market the benefit of CESA #9 services**

EMPLOYEE/DEPARTMENT:

Additional Goals for Continuous Improvement and Innovation:

-
-

Reflection on and Evidence of Goal Progress/Accomplishment (provided annually by June 30th):

-
-

Employee Signature:

Supervisor Signature(s):

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Communication and Support of Priority Work

Name: _____

Date: _____

Student Achievement •	People •	Quality Service •	Finance •	Growth & Innovation •
Current Status-“At Bat”				
•	•	•	•	•
Next Steps (Upcoming Benchmarks and Deadlines)				
On the Horizon-Priorities “On Deck” and “In the Hole”				

**CELEBRATING SUCCESSES,
TELLING STORIES, & SHOUT OUTS**



May 14 - To Hanna - you've been a great help to me since you came to CESA9 - you've taught me new things w/Google, covered for me when I was suddenly called away - and did a great job at it - thank you!

May 16, 2015 - To Beth Tepper! you are an awesome person to work with, learn with, and learn from! you are not afraid to let me run with my ideas and offer my input and/or suggestions. I admire that we can learn new things together without being afraid of the other's opinion. I know that I have learned so much from you already! Keep on being such a great teacher!

May 18, 2015 - To Casey, have I told you lately I love your brain?!? I am so excited to have your knowledge and experience to tap into. So looking forward to working with you! Beth



CESA #9 shared **UW-Marathon County's** post.
 Posted by Karen Wendorf-Heldt
 Thursday at 7:14 PM · 🌐

UW-Marathon County
 November 3 at 12:20 PM · 🌐

Professor Paul Martin works with students to overcome negative math experiences.

UW professors lauded for helping math haters
 Professors at UWMC and UW-Marshfield/Wood County aim to con...



Like Comment Share



CESA #9 added 2 new photos.

Posted by Jenny Miner
November 2 at 2:00 PM · 🌐

Hi There! I am Beth Tepper and I am all about learning through PLAY! I guess that is because I have been an Early Childhood Educator since 1976 AND am a kid at heart. The majority of my career was in the Merrill Area Public Schools. I was an Early Childhood Special Ed teacher and my last three years I was an administrator for Early Childhood, 4K and Director for Head Start. Five years ago I joined CESA 9 as the Early Childhood Special Education Program Support Teacher. I loved

my old job and I love my new job! I am married and have two wonderful children - both have followed me into the world of education which I am very proud of. My pride and joy are my two one year old granddaughters! They give me hours of playtime fun as I marvel at their growing brains and bodies! I am a putterer with arts and crafts, love being creative, my latest passion is oil painting. I enjoy golf, game playing, travel and adventure.

👍❤️ 43

6 Comments

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Saturday at 8:00 AM · 🌐

#WausauSchools staff at the Longfellow Administration Center held... Continue Reading



Monday at 7:45 PM · 🌐

We have a new workshop available! Early Childhood: Special Education Apps for Language and Literacy will be on January 24th! Click the link for more information! bit.ly/ECSPEDAps

Early Childhood: Special

photos.

Yesterday at 1:44 PM · 🌐

Today we had a special visit from the Mosinee VFW Women's A... Continue Reading



REFLECTIONS ON THE JOURNEY SO FAR...

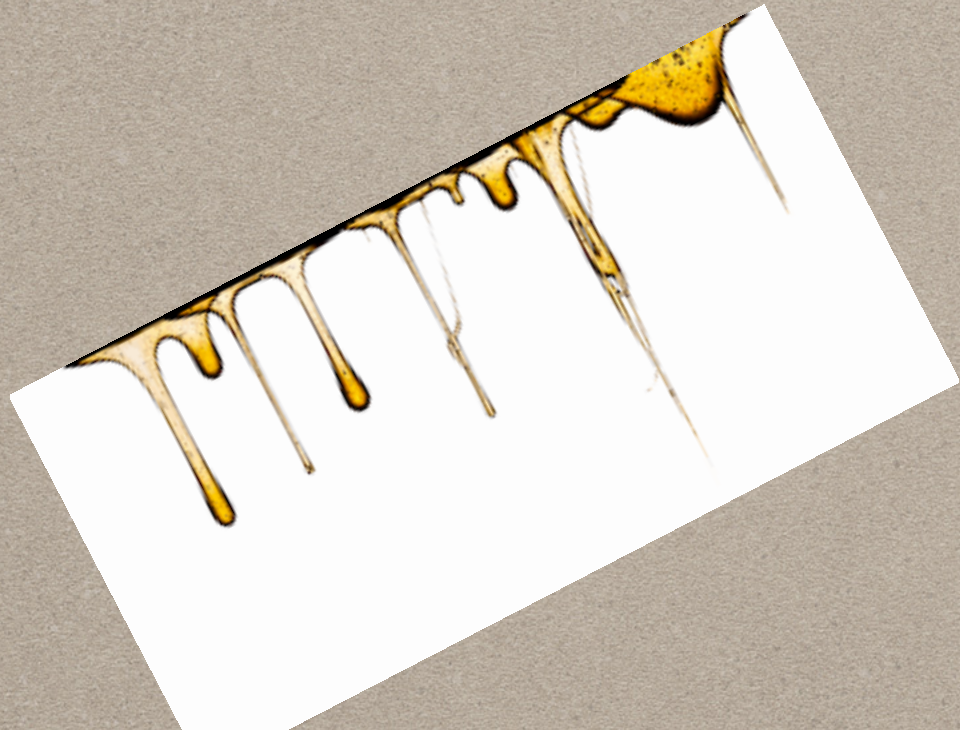
- Set the tone-tend to culture
- High expectations & high support
- Drive out the scary in change
- Model-lead the way
- Manage up
- Communicate...A LOT
- Seek feedback-round & follow through
- Stay the course
- Keep learning



"People wish to be settled; only as far as they are unsettled is there any hope for them."

-Ralph Waldo Emerson

STICKY IDEAS: WHAT WILL YOU DO ABOUT THEM?



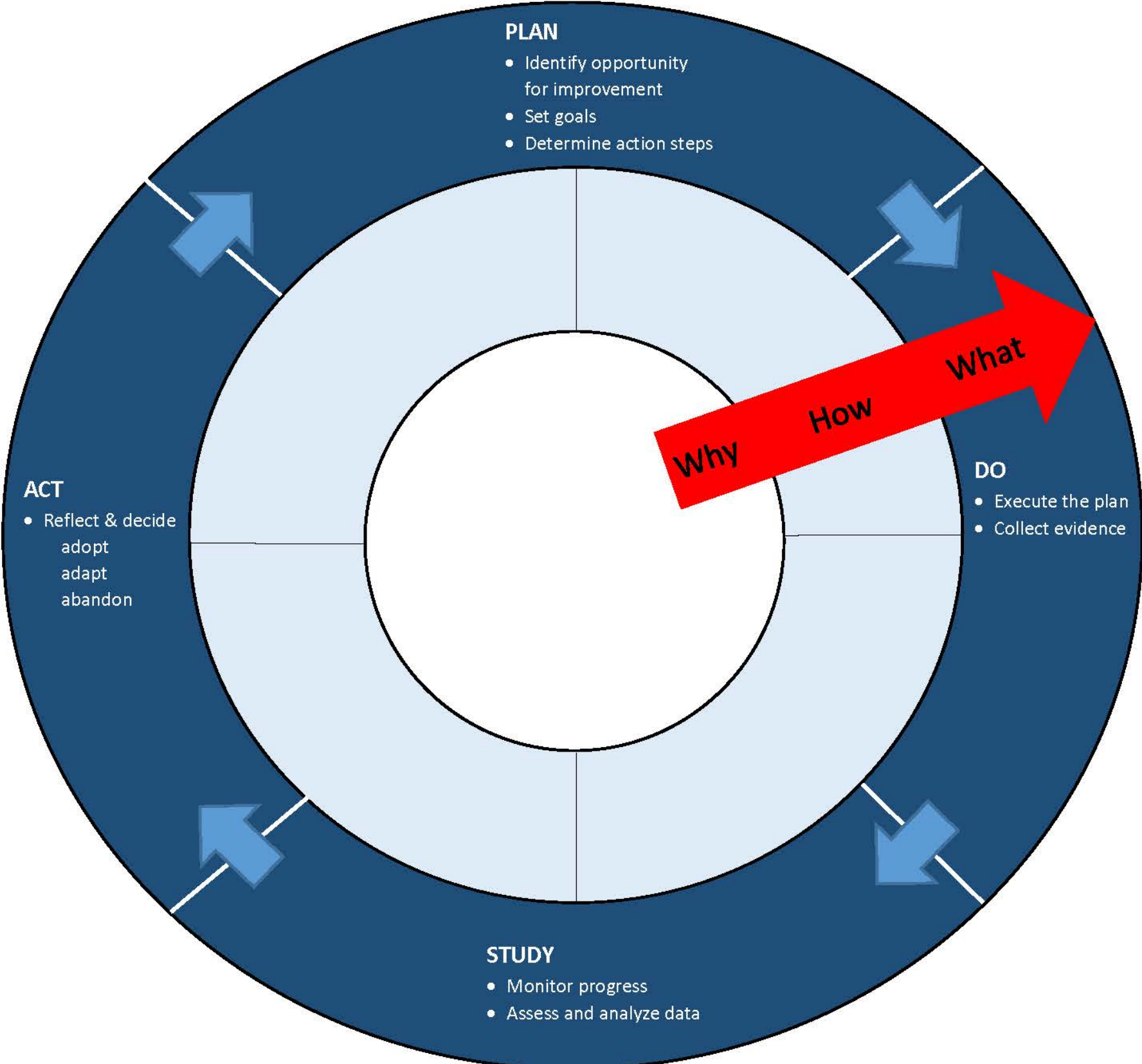
SO WHAT?

3 things you learned or were reminded of

2 questions you have or things you'd like to learn more about

1 thing you'll do in the next week to intentionally improve your leadership practice

Continuous Quality Improvement



Dr. Melissa Matarazzo

melissa.matarazzo@studergroup.com



Dr. Karen Wendorf-Heldt

Agency Administrator

Cooperative Educational Service Agency #9

304 Kaphaem Road ▪ PO Box 449 ▪ Tomahawk, WI 54487-0449

Phone (715) 453-2141 x257 ▪ Fax (715) 453-7519

Cell (715) 218-1833

Email: kheldt@cesa9.org

**QUESTIONS, COMMENTS, OR
WONDERINGS ABOUT THE
WORK OR THE PARTNERSHIP
WITH STUDER EDUCATION**