Review of the
Administrative Organization
of the Charlotte-Mecklenburg Schools
2012

Dr. Heath Morrison, Superintendent of the Charlotte-Mecklenburg Schools (CMS), requested that the Council of the Great City Schools (CGCS) provide a high-level review of the District’s administrative organization. Specifically, he requested that the Council—

- Review and evaluate the organization and management structure of the District
- Develop recommendations that would help the District achieve greater operational efficiencies, effectiveness, and sustainability.

In response to this request, the Council assembled a Strategic Support Team (the Team) of senior executives with extensive management experience from other major city school systems across the country. The Team was composed of the following individuals. (Appendix A provides brief resumes of the Team members.)

Robert Carlson, Project Coordinator
Director, Management Services
Council of the Great City Schools

David Koch, Principal Investigator
Chief Administrative Officer (Retired)
Los Angeles Unified School District

1 The Council has conducted nearly 250 instructional, management, and operational reviews in about 45 big-city school districts over the last several years. The reports generated by these reviews are often critical, but they also have been the foundation for improving the operations, organization, instruction, and management of many urban school systems nationally. In other cases, the reports are complimentary and form the basis for identifying “best practices” for other urban school systems to replicate. (Appendix G lists the reviews that the Council has conducted.)
Ann Chan
Chief Human Resources Officer
Boston Public Schools

Denise Collier
Deputy Superintendent
Dallas Independent School District

Mike Contompasis
Superintendent and Chief Operating Officer (Retired)
Boston Public Schools

Joe Edgens
Executive Director of Facility Services (Retired)
Metropolitan Nashville Public Schools

Michael Eugene
Chief Operations Officer
Orange County (FL) Public Schools

Kenneth Gotsch
Former Chief Financial Officer
Chicago Public Schools

Ascencion Juarez
Chief Human Resources Officer (Retired)
Chicago Public Schools

Donald Kennedy
Interim Chief Operations Officer
Bridgeport Public Schools

Frederick Schmitt
Chief Financial Officer (Retired)
Norfolk Public Schools

Tom Ryan
Chief Information Officer (Retired)
Albuquerque Public Schools

Ricki Price-Baugh
Director, Academic Achievement
Council of the Great City Schools

Arnold Viramontes
Chief Technology Officer
Houston Independent School District

Denise Walston
Senior Coordinator, K-12 Mathematics (Retired)
Norfolk Public Schools

The Team conducted fieldwork for the project during a four-day site visit to Charlotte on August 14-17, 2012. The general schedule for the site visit is outlined below. (The complete draft working agenda for the site visit is presented in Appendix B.)

The first day of the site visit the Team met to review the objectives of the engagement and to make last-minute adjustments to the agendas. The Team used the next two days of the site visit to conduct interviews with key staff members and examine documents and data. The complete lists of materials reviewed and individuals interviewed are presented in Appendices B² and C³. The final day of the visit was devoted to synthesizing and refining the Team’s findings and recommendations.

The Council sent the draft of this document to each of the team members for their review in order to ensure that the report accurately reflected their findings and to obtain their concurrence with the final recommendations. This management letter contains recommendations that have been designed by the Team to help improve the administrative and operational efficiency and effectiveness of the CMS system.

The Charlotte-Mecklenburg Schools
Administrative Organization

The CMS is the largest public school system in North Carolina and the 20th largest in the United States. The District operates almost 160 schools with approximately 140,000 students supported by over 18,000 full and part-time employees. The General Fund annual operating budget amounts to approximately $1.2 billion.

The District has responsibility and control over the activities related to public school education in Mecklenburg County and is governed by a nine member Board of Education three of whom are elected at-large and six of whom are elected from geographically defined districts. The Board of Education operates under the policy governance model and thus is the policymaking and planning body whose decisions are carried out by the Superintendent.

² Unfortunately, information requested weeks in advance by the Council was not made available to Team members until immediately before the site visit, thereby limiting the Team’s ability to reference the materials in conjunction with the interview process.
³ The Council’s reports are based on interviews with District staff and others, a review of documents, observations of operations, and professional judgment. The team conducting the interviews must rely on the willingness of those interviewed to be truthful and forthcoming and cannot always judge the accuracy of statements made by interviewees.
The School Board has recently appointed a new Superintendent of Schools, after over a full year of interim stewardship. The Superintendent inherited an organization with a limited span of control and few staff resources. The organization chart in Exhibit 1 displays the high level District administration as of July, 2012.

Exhibit 1: CMS Administrative Organization Chart

As illustrated above, the Superintendent has five direct reports, including two staff positions (i.e., the Executive Director of Communications and the Chief of Staff) and three line positions: the Deputy Superintendent for Teaching and Learning (T&L), the Chief Financial Officer and the Chief Operating Officer.

The Deputy Superintendent for Teaching and Learning has 28 direct reports, according to organization charts presented to the Team. These include an Assistant Superintendent, eight Executive Directors, eleven Directors, six Zone Superintendents (school principals report through the Zone structure), the Chief Strategic and Accountability Officer and the Chief Human Resources Officer. Programmatically, the Deputy’s span of control includes:

- Zone Superintendents (PreK-12 schools)
  - Zone Support
  - Title I
- Exceptional Children (EC) Programs
- English as a Second Language (ESL) Student Education (PreK-12)
• Teacher Incentive Fund (TIF)/Leadership for Educators’ Advanced Performance (LEAP)
• Project Leadership and Investment For Transformation (LIFT) Zone
• Federal and State Compliance and Programs
• Curriculum Support Programs
• Student Services
• Family and Community Services
• Pre-K Instruction
• Advanced Studies
• Magnet Schools
• Media Services
• Leadership Strategy
• Career and Technical Education
• PreK-12 Curriculum Support Programs
• Academic Services
• Professional Development
• State and Federal Programs
  o State Testing
  o Data Processing
• Research, Analysis and Data Utilization
  o Center for Information, Visualization and Innovation
  o Data Tools
  o Research and Evaluation
  o Grants
• Human Resources (Enterprise-wide)

The Chief Financial Officer (CFO) has three direct reports - the Executive Director for Budget Development and Management Services, the Executive Director of Financial Services (whose organization includes Payroll, Accounting and Auditing, and Accounts Payable) and the Executive Director of Procurement Services.

The Chief Operating Officer (COO) has four direct reports - the Associate Superintendent - Auxiliary Services (who oversees Building Services, Child Nutrition, Transportation, Inventory Management, Graphics, Architecture, Capital Projects, and Safety), the Executive Director of Student Planning (who oversees School Police, Alternative Education, Athletics and Student Planning, Placement, and Records), the Executive Director of Planning and Project Management (who oversees Facilities and Real Estate and Project Management) and the Interim Chief Information Officer.
Findings and Observations

The findings and observations of the Council’s Strategic Support Team are organized into the following areas: Commendations, Organizational Design Issues, and Leadership and Management Concerns.

Commendations

- Charlotte-Mecklenburg Schools has sustained one of highest student performance records of any urban school system in the country.

- The National Assessment of Educational Progress (NAEP) scores of CMS exceed the national average.

- CMS has been awarded the Broad Prize for Urban Education which recognizes gains in student performance and the narrowing of achievement gaps between groups of students.

- Departments across the Teaching and Learning (T&L) Division use tactical plans that are linked to the District’s strategic plan and organizational goals.

- T&L utilizes cross-functional steering committees that include General Education, ESL, Exceptional Education, and stakeholders in the planning and implementation of multi-year projects.

- The Curriculum Department of T&L systematically engages the Special Programs and Professional Development Departments in Common Core implementation.4

- The PreK-12 Curriculum Department has documented cross-functional procedures, guidance, and direction in areas such as course management, course approval, vendor approval, and the annual list of requirements for principals.

- The Exceptional Education Department has clearly documented processes and procedures and specific management systems which are available to educators and parents on line.

- Staff of T&L consistently indicated that access to the Deputy Superintendent was unimpeded and that she championed their projects and programs.

---

4 The Common Core State Standards provide a consistent, clear understanding of what students are expected to learn, so teachers and parents know what they need to do to help them. The standards are designed to be robust and relevant to the real world, reflecting the knowledge and skills that our young people need for success in college and careers. See more at www.corestandards.org.

• The District has a long history of external audit reports without any significant discrepancies or exceptions.

• The Finance Department (with the exception of the Internal Audit unit, which is discussed later in this report) is appropriately organized with clear lines of responsibility and authority.

• The Finance Department commended the work of the Information Technology (IT) liaisons that assist them with the implementation and operation of the District’s ERP.

• The Team noted that the service units under the Associate Superintendent - Auxiliary Services, including Facilities, Child Nutrition, and Transportation, utilize performance measures to track effectiveness and encourage efficient operations.

• The Auxiliary Services Department reported that its leadership is certified in ISO 9000 and is also going through some Six Sigma management training. (This has influenced other areas under the COO to do the same.)

• The Auxiliary Services Department has well-written and detailed standard operating procedures to guide how they conduct business.

• Both Auxiliary Services and Student Planning have strategic initiatives that connect to the District’s strategic plan, and have department based priorities that are not formally part of the district-wide plan, but are tied to strategic plan goals.

Organizational Design Issues

• Certain essential staff support functions to the Superintendent’s office are currently assigned to other offices or do not exist in the organization. For example -
  
  o The Chief of Staff and the Executive Director of Communications are the only support staff positions assigned the Superintendent.

---

5 ISO 9000 and Six Sigma are families of standards related to quality management systems and designed to help organizations ensure that they meet the needs of customers and other stakeholders while also meeting statutory and regulatory requirements related to their industry.
The Legal Counsel reports to the Board of Education.

The accountability functions, including testing and research, are within the Deputy Superintendent’s organization.

Project Management functions, such as they are, are under the Chief Operating Officer.

- The extraordinary span of control of the Deputy Superintendent (28 positions or units as noted above) brings into question whether sufficient supervision, guidance, evaluation, and management are taking place in that organization.

- There has apparently been no effort to implement a T&L organization that reflects workflow or that identifies and integrates core functions, the result being a plethora of organizational niches that reflect constituent special interests.

- The Team noted excessive layers of management and overlapping titles in some areas. For example -

  - The Executive Director of Performance Management reports to the Executive Director of Planning and Workforce Management.
  - The Director of ESL Student Education reports to the Executive Director of ESL Student Education.
  - The Director of Student Placement reports to the Executive Director of Student Planning, Placement, and Records.
  - The Real Estate Coordinator reports to the Director of Facilities and Real Estate, who reports to the Executive Director of Planning and Project Management.
  - Some Executive Directors report to the COO, while others within the COO’s organization report to an intermediate supervisor.

- The Team was advised that the implementation of a Market Adjustment Compensation Study has limited job classifications and compressed pay grades resulting in the manipulation of job titles, the hiring of consultants rather than employees, and the inability to create career ladders. For example –

  - The title of Director is used extensively in the T&L organization for positions that may or may not have supervisory responsibilities.
  - The titles of Director and Assistant Director are used in the IT organization to increase salaries to competitive levels in order to retain technical employees.
• Certain units within IT use consultants extensively because the compensation for these positions can equal that of Chief-level positions.

• Attempts to establish career paths in certain Auxiliary Services occupational groups have been thwarted by the limitations imposed by the adoption of the study.

• Certain positions do not appear on the District’s organization charts and other positions appear incorrectly on charts. For example –

  • Seven positions funded by Title I and presumed to report to the Deputy Superintendent are not reflected on the T&L organization chart; however, the positions do appear in the Title I organization chart.

  • The Team was advised that the HR organization charts reflect positions that actually report directly to the Deputy Superintendent.

• There is not a consistent distribution of schools within administrative Zones.

• Overlapping responsibilities and redundant functions are commonplace in the District resulting in overstaffing and inefficiencies. For example –

  • Professional development functions were identified throughout the District organization with little, if any, coordination.

  • There are multiple Help Desks throughout the organization without consideration of how customers might locate the one they need and they lack a uniform call tracking system. To illustrate –

    ▪ IT has three different Help Desks (ERP, Tech Services, and Student Information) with a total of eleven people.

    ▪ Payroll has a Help Desk with a staff of three (while the employee self-service module is underutilized).

    ▪ The Student Placement Help Desk function has three employees.

    ▪ Media Services has two people assigned to their Help Desk.

  • Two different units within HR are working on a Performance Management project without any apparent coordination.

  • IT tier I and tier II level technical support are bifurcated, reducing their efficiency.
- Student enrollment projections are performed in two departments resulting in one set of projections being used for facilities planning and another set used for other planning.

- Facilities management areas for real estate and portable classroom planning are under the Executive Director for Planning and Project Management, yet the overall facilities and maintenance functions report to the Associate Superintendent of Auxiliary Services.

- The activities of the Director of Process Quality in Auxiliary Services are not coordinated with the Planning and Project Management Department.

- The Team noted organizational placements that were illogical, inappropriate, or that varied from recognized best practices. For example –
  
  - The Internal Audit function is inappropriately placed within the CFO’s organization compromising its value as an internal control.
  
  - The Employee Relations function reports to the General Counsel’s office.
  
  - Athletics and Alternative Education are misaligned as part of the COO’s organization.
  
  - The School Police Department is inappropriate as a part of the Student Planning Department in the COO’s organization.
  
  - The T&L position that coordinates non-core curriculum areas does not report to the Curriculum Department.
  
  - The Project Management Office appears to have the responsibility of strategic plan management, but lacks the authority to lead it or compel action.
  
  - The Safety Office in Auxiliary Services is responsible for workplace safety oversight, while risk management is within the CFO’s organization.

- Several administrative areas were noted as being understaffed. For example –
  
  - The loss of school-based support staff through budget cuts has resulted in Principals and Zone Superintendents spending significantly more of their time on mundane administrative tasks rather than instructional leadership.
  
  - The District provides only 17 computer technicians for its almost 160 school sites.
  
  - The Accountability unit lacks sufficient senior analysts.
o IT does not have the staffing to support individual departments, such as Exceptional Children Programs and Child Nutrition, in their efforts to acquire more technology in order to become more efficient.

o The Maintenance staff indicated, and principals confirmed, that their support of schools is lacking due to years of budget reductions.

**Leadership and Management Concerns**

- Concerns include:
  - Senior staff was unclear as to the current reporting relationships among the executive levels.
  - From the parents’ perspective, there is no single, central office unit or person responsible for district-wide parent engagement or support.
  - Some interviewees believed that IT reported to the Deputy Superintendent, while others thought it reported to the COO (as reflected in the organization charts presented to the CGCS Team).
  - HR staff was unsure to whom recruiters and other field personnel reported.
  - The District staff is unclear as to the role of the Board’s Privatization Advisory Committee and how it might impact operational decision making.

- Some interviewees from both within and outside the District expressed a lack of confidence or trust. For example –
  - Parents expressed the belief that the District does not actively involve them as partners in strategic decisions.
  - Some in the community question the validity of information and data that are provided by the District.
  - Certain offices within the District are distrustful of the information provided by the IT department.
  - Some of the departments reporting to the COO appear to be in competition with each other and protective of their turf.

- The District’s Strategic Plan appears to have lost momentum and lacks a discipline to ensure that it is on track.
• The District has abandoned its commitment to a Project Management Office (PMO) and to a uniform project management methodology, inclusive of standardized status reporting.

• There is a general lack of performance metrics in most of the District and its efforts at quality performance management are scattered, uncoordinated, and compartmentalized. For example –
  - Only some parts of the HR department attempt to use a performance dashboard.
  - Some units within Auxiliary Services use the ISO 9000 approach to improving the quality of processes while some other units use the Six Sigma approach.

• The flows of information, as well as many T&L processes, are relationship-based rather than systematic, jeopardizing continued collaboration between units when personnel turn over.

• The Team found no indication that there are written processes or documented systems in place to coordinate work flow or align the efforts of the Curriculum units with the Zone Superintendents.

• It is the District’s stated goal for principals to be instructional leaders; however, only 3 of 22 competencies listed in the CMS Standards for School Leaders are referenced as instructional competencies. (In addition, these competencies are not adequately defined.)

• It was reported that there are about 1,400 potential students on the pre-K waiting list that are not being served.

• The District has not established a formal business continuity plan.

• There is no long term financial planning in the District (e.g.; there is no 3 year or 5 year financial plan).

• The Finance Department has no formal cash management policies in place.

• The Risk Management function is administered through a consortium (city, county, schools) and, while the CFO is a member of the consortium committee, it was not clear what level of influence CMS has over decisions related to critical risk areas such as property insurance and liability insurance.
• Unexpended year-end resources are used for equipment replacement rather than having a scheduled equipment refresh program and it was not clear how funding priorities are determined for this spending.

• Curriculum units in T&L report that budget allocations to schools relating to their respective disciplines are not coordinated with them.

• HR does not have an employee recruitment plan, in spite of the need for 2,000 new teachers each year.

• HR hiring and placement processes appear to be inadequate or ignored, labor-intensive, slow and cumbersome, and subject to high error rates.

• School Principals, the EC Program, and administrative offices express frustration with the HR department’s inability to provide qualified, quality job applicants on a timely and systematic basis. For example –
  o Principals complained that the system of interviewing and selecting teachers was cumbersome and confusing.
  o EC staff indicated that they were not consulted on teacher placements resulting in improper licensure.
  o Project LIFT was reported to have hired its own HR specialists because of the Department’s inability to perform the personnel functions required for the project.

• Offices reported difficulty in negotiating skill sets, qualification, and titles with the HR Department for new positions or for changes in job classifications.

• The HR department does not use the full functionality of the District’s ERP Talent Acquisition and Workforce Planning modules resulting in the creation of information islands on isolated spreadsheets.

• IT has not adopted a formalized project governance model to manage major initiatives and enterprise systems.

• There is no comprehensive long-term Technology Plan, linked to the District’s Strategic Plan, which adequately addresses the on-line Common Core Assessment and other priorities and requirements; hardware and software refresh; and staff training.

• IT has not constructed and adopted a formalized enterprise-wide architecture for systems, applications, or data.
• Contract approval workflow has not been automated as part of the District’s ERP.

• Communication and coordination issues between IT and other departments have been an impediment to smooth and efficient operations.

• The Building Services department does not have a Facility Condition Index which would allow objective and consistent comparison of facilities in order to establish capital funding priorities.

• Textbook inventories are reported to be inaccurate and there is a lack of accountability for lost books.

• The district does not have a comprehensive disaster recovery and business continuity plan for the all mission critical units.

**Recommendations**

• Restructure the District’s organization to incorporate best practices, establish more consistent and manageable spans of control, align functional units, reflect workflow, eliminate redundancies, create consistent job titles, and affect greater efficiency and effectiveness. The following organization charts and related narrative present the high level functional organization recommended by the Team⁶.

• Exhibit R-1 below displays the recommended Board level organization including the following direct reports –

  i. The Superintendent, who is responsible for all school and support operations

  ii. The Internal Audit function, guided by a district-wide risk assessment and under a Board approved annual plan (this unit includes the auditing resources currently part of the CFO’s organization)

---

⁶ The District may choose from a number of interim reporting structures in order to transition over time to this flatter, functional organization; including modifications to the current structure (as displayed in Exhibit 1, on page 4). The Council has included modifications to the current structure proposed by the district’s administration in Appendix E; as well as an alternative to the flatter, more functional organization structure outlined in this report in Appendix F. The Council defers to the district administration to provide the rationale for their proposals, but it is concerned that the Superintendent’s span of control with the titles of reporting departments displayed as line positions in its flatter, more functional organization could be problematic.
iii. A Board support function staffed to assist with the management of meetings, committees, agendas, materials and minutes and provide the District’s archive function.

**Exhibit R-1 Board Level Organization**

- Exhibit R-2 below displays the recommended Superintendent’s office staff positions reporting to the Superintendent including –
  
i. The Director of Communications responsible for media relations, parent and community outreach, and intergovernmental relations

ii. The General Counsel responsible for providing advice and counsel to the administration on all legal matters and coordinating the use of outside legal counsel (This office currently reports to the Board of Education.)

iii. The Director of Accountability & Project Management responsible for educational research, the robust evaluation of District instructional programs, and the gathering of student achievement data (This unit includes the resources currently in the office of the Chief Strategic and Accountability Officer.) This office also incorporates Project Management responsibilities for the monitoring and reporting of district-wide projects with an adopted standardized project management methodology (This unit includes the Performance Improvement Specialist from Auxiliary Services.)

iv. The Chief of Staff responsible for a wide range of duties that support the Superintendent, including the coordination of inter-departmental activities.
Exhibit R-2 Superintendent’s Office Staff

- Exhibit R-3 below displays the line positions reporting to the Superintendent, including –
  
i. The Chief of School Operations responsible for all school based activities through the Zone Superintendents (see section 1.d below).

  ii. The Chief Academic Officer responsible for district-wide curriculum development and special programs (see section 1.e below.)

  iii. The Chief Human Resources Officer responsible for the recruitment, hiring, placement, employee services, and classification of all employees and the collective bargaining, contract administration, and HR regulatory functions (see section 1.f below).

  iv. The Chief Financial Officer responsible for budget, accounting, payroll, and procurement functions (see section 1.g below)

  v. The Chief Information Officer responsible for district-wide technology systems, applications, and support functions (see section 1.h below).

  vi. The Chief Operating Officer responsible for support services including Transportation, Food Services, Facilities, Capital Projects, and Inventory Management (see section 1.i below).
Exhibit R-3  Superintendent’s District Level Organization

- Exhibit R-4 below displays the recommended Chief of School Operations’ organization including the following functional direct reports –
  
  i. The School Police responsible for district-wide security and school based Resource Officers (This unit includes the school police resources currently assigned to the Student Planning organization.)

  ii. Planning and Placement responsible for school planning and student placement (This unit includes the Student Planning resources currently assigned to the COO’s organization.)

  iii. Zone Support responsible for activities to assist and support the Zone Superintendents.

  iv. The Zone Superintendents (6) responsible for the direct management of school based activities through the school Principals.

Exhibit R-4  Chief of School Operations Organization
Exhibit R-5 below displays the recommended Chief Academic Officer’s organization including the following functional direct reports:

i. Exceptional Children Education responsible for the management and operations of the District’s special education programs.

ii. Curriculum responsible for the research and development of school curriculum including pre-K instruction, educational technology, engineering and mathematics, humanities, K-12 instruction, magnet programs, advanced studies and enrichment programs.

iii. Professional Development responsible for the development and execution of all certificated staff development and training programs, with emphasis on new teacher support and principal development.

iv. English Language Learners responsible for the management of the District’s ELL programs.

v. Student Services responsible for psychological, social work, counseling, and intervention programs and services.
Exhibit R-5 Chief Academic Officer Organization

- Exhibit R-5.A below displays an alternative matrix-type organizational structure to the Chief of School Operations and Chief Academic Officer organizations shown above in Exhibit R-5 that could also address concerns regarding the academic support functions raised in this review. For example, the CAO would have the following direct reports –

  - Pre-K Services and Elementary Schools
  - Middle Schools
  - High Schools
  - Alternative Education & Magnet Programs
  - Education Services
  - Leadership Program

In this model the Chief Academic Officer would be responsible for balancing the functional responsibilities of the Assistant Superintendents for Schools, who manage the schools within their assigned grade levels, with the programs, products, and services developed by the Assistant Superintendent for Education Services. In so doing, rigorous academic opportunities would be provided on a
continuum allowing students to reach classroom performance levels consistent with their abilities in specific curriculum areas and across all grade levels. The Assistant Superintendent for Education Services would be responsible for using highly qualified specialists, under the Directors of Curriculum and Instruction, to develop consistent, efficient and effective educational services that are used by the Assistant Superintendents for Schools. The Chief Academic Officer would use the Leadership Program to ensure that skills are maintained at a level sufficient to manage and perform within a matrix organization.

**Exhibit R-5.A  Alternative Academic Officer Organization**

- Exhibit R-6 below displays the recommended Chief Human Resources Officer’s organization including the following functional direct reports –
  
  i. On-Boarding unit responsible for marketing, recruitment, hiring, and placement of all teaching, support, and administrative personnel.
  
  ii. Employee Services responsible for employee handbook information, verification of employment, leaves of absence, separation and retirement assistance.
  
  iii. Contract Administration and Labor Relations responsible for collective bargaining and employee discipline (This unit includes the Employee Relations organization currently part of the General Counsel’s office.)
iv. Classification, Compensation, and Evaluation responsible for the district-wide alignment of job descriptions, classifications, titles, and salary schedules and oversight of the employee evaluation processes.

v. Professional Development responsible for district-wide teacher, school leadership, and support staff training, growth, and improvement.

Exhibit R-6 Chief Human Resources Officer Organization

- Exhibit R-7 below displays the recommended Chief Financial Officer’s organization including the following functional direct reports –

  i. The Women, Minority, & Small Business Enterprise (WMSBE) unit responsible for monitoring the District’s procurement and employment affirmative action programs.

  ii. The Risk Management function responsible for coordination and oversight of the District’s insurance and safety programs (This unit includes the Safety organization currently part of the Auxiliary Services division.)

  iii. Budget responsible for budget development, monitoring, and compliance.

  iv. Financial Services responsible for payroll, accounts payable, and the official financial books and records of the District.
v. Procurement responsible for the purchasing functions.

**Exhibit R-7 Chief Financial Officer Organization**

- Exhibit R-8 below displays the recommended Chief Information Officer’s organization including the following functional direct reports –

  i. The Technology Security Administrator, a staff position, responsible for technology security policies, procedures, and training.

  ii. The Director of Enterprise Systems and Applications responsible for systems and application software development and maintenance including the ERP, SIS, and Data Warehouse.

  iii. The Director of Technology Support responsible for a new consolidated Help desk operation and district-wide work station support.

  iv. The Director of Architecture, Networks, Data Operations responsible for enterprise systems architecture, LAN, WAN, internet, server administration, database administration, and data center operations.

  v. The Director of Digital District responsible for instructional technology, digital school design, process re-engineering, and development of the technology master plan.
Exhibit R-8 Chief Information Officer Organization

Exhibit R-9 below displays the recommended Chief Operating Officer’s organization including the following functional direct reports –

i. Transportation Services responsible for all school bus operations, vehicle maintenance, and field trip booking.

ii. Facilities Services responsible for custodial and grounds services, facilities maintenance, capital projects (including school construction and renovation) and building rental services.

iii. Child Nutrition responsible for school cafeterias and related support functions.

iv. Inventory, including Graphics and Print Services.

Exhibit R-9 Chief Operating Officer Organization
- Develop a strategic plan on a collaborative basis with the Board, administration, and other stakeholders.

- Establish and publicize goals, objectives, and performance measures linked to the District’s strategic plan with timelines, milestones, assigned responsibilities, and regular reporting at all levels of the organization.

- Establish a long-range financial plan with multi-year income projections and budget plans linked to the strategic plan.

- Re-establish a standardized district-wide project management methodology and give authority to the PMO to compel action.

- Expand the use of cross-functional teams for projects that span multiple divisions.

- Evaluate the reallocation of resources to better support Principals and Zone Superintendents and to provide better technology and analytical support to schools and departments.

- Restructure professional development efforts so they are aligned with the District’s strategic plan and organizational priorities and create a catalog of offerings that is data-driven, is cost beneficial, and can demonstrate a measurable impact.

- Establish and institutionalize policies and procedures so managers do not have to rely on personal relationships to do their jobs effectively.
• Develop and implement a disaster recovery and business continuity plan for the District including all mission critical units.

• Establish cash management policies and procedures.

• Establish on-going funding for a scheduled computer and equipment refresh program.

• Ensure that all external and internal audits of District programs, functions, and offices are reported to the Board’s Audit Committee on a timely basis.

• Design and implement a comprehensive and efficient teacher recruitment plan.

• Establish service level agreements between service providers (such as HR and IT) and their customers that clearly define processes, responsibilities, and expectations.

• Establish clearly defined and realistic guidelines and parameters for classification of new positions and re-classification of existing jobs.

• Establish a hierarchical IT Governance structure to set priorities, manage the overall IT portfolio, allocate resources, promote adherence to established technology policies, and enhance communications.

• Take greater advantage of the full functionality of the District’s ERP system in HR applications, employee self-service, and contract processing.

• Develop a long range Technology Plan linked to the District’s Strategic Plan and incorporating the District’s view of the digital future.

• Develop a Facility Condition Index to help define capital funding priorities.

• Improve textbook policies and procedures to ensure more accurate book inventories and provide greater accountability.

• Provide improved technology for performance measurement, including uniform call tracking software in Help desk operations.
APPENDIX A. STRATEGIC SUPPORT TEAM

Robert Carlson

Robert Carlson is Director of Management Services for the Council of the Great City Schools. In that capacity, he provides Strategic Support Teams and manages operational reviews for superintendents and senior managers; convenes annual meetings of Chief Financial Officers, Chief Operating Officers, Transportation Directors, and Chief Information Officers and Technology Directors; fields hundreds of requests for management information; and has developed and maintains a Web-based management library. Prior to joining the Council, Dr. Carlson was an executive assistant in the Office of the Superintendent of the District of Columbia Public Schools. He holds doctoral and masters degrees in administration from The Catholic University of America; a B.A. degree in political science from Ohio Wesleyan University; and has done advanced graduate work in political science at Syracuse University and the State Universities of New York.

David W. Koch

David Koch is the former Chief Administrative Officer for the Los Angeles Unified School District (LAUSD). The LAUSD is the nation’s second largest public school system, with more than 700,000 students in grades K-12, an annual budget of more than $9 billion, and more than 80,000 full- and part-time employees. Mr. Koch’s responsibilities encompassed virtually all non-instructional operations of the District, including finance, facilities, information technology, and all of the business functions. Mr. Koch also served the LAUSD as Business Manager, Executive Director of Information Services, and Deputy Controller. Mr. Koch was also Business Manager for the Kansas City, Missouri Public School District and was with Arthur Young and Company prior to entering public service. He is a graduate of the University of Missouri and a Certified Public Accountant in the states of California, Missouri, and Kansas. Currently a resident of Long Beach, California, Mr. Koch provides consulting services to public sector clients and companies doing business with public sector agencies.

Ann Chan

Ann Chan is the Chief Human Resources Officer for the Boston Public Schools. Prior to Boston, Ms. Chan was the Director of Human Resources Operations with the Chicago Public Schools (CPS). In this role, Ms. Chan managed and supported the strategic alignment of all human resources functions to the core goals of the CPS and served as liaison between the Department of Human Resources and all other CPS units. She spearheaded the requirement gathering phase vital to the successful replacement of a 35-year-old, homegrown, customized database system with a state-of-the-art Human Capital Management System, PeopleSoft. With years of experience in the field of Human Resources, Ms. Chan is well-versed in the various stages of an employee’s career cycle and human resources services. Prior to coming to the CPS, Ms. Chan...
worked for the Sheraton Hotel chain in Chicago and the National Association of Independent Insurers, covering all functions of human resources from hiring to benefit plans to employee relations. At the Sheraton, she was responsible for the staffing of a brand new 1,209 room Sheraton Hotel. Ms. Chan received her degree in Psychology from the University of Illinois in Champaign and is a member of the Society for Human Resources Management.

Denise Collier

Denise Collier has served public schools and students in Texas and across the nation for 30 years. Prior to her 2009 retirement, Denise served as the Chief Academic Officer and Deputy Superintendent of the Dallas Independent School District. Before joining Dallas ISD, Denise led curriculum and instruction programs in several other Texas districts and taught at the elementary and middle school levels. Dr. Collier served as a member of the Council of the Great City School’s Common Core Standards review committee and as a member of the Department of Education’s No Child Left Behind technical advisory panel (one year appointments). At the state level, Denise most recently led the development of a field guide for the New Vision for Public Education in Texas for the Texas Association of School Administrators. In the past two years as an independent consultant in teaching and learning transformation, Dr. Collier has facilitated district curriculum and instruction improvement efforts in districts across the nation. Dr. Collier received a B.A. in Education from Angelo State University, a Master's degree in Reading Education from East Texas State University, and a doctorate in Education from the University of Texas at Austin. Dr. Collier is currently an adjunct professor for the University of Texas at Austin in the Cooperative Superintendent and Urban Leadership programs and for Concordia University in the Graduate School of Education.

Michael Contompasis

Michael Contompasis retired after two years as Superintendent of the Boston Public Schools. Previously he served as the district’s Chief Operating Officer from 1998 through 2005. Before moving to a district leadership role Mr. Contompasis was the Head Master of Boston Latin School, the State’s top performing 7-12 secondary school, where he was honored as a Milken Educator in 1997. From 1996 to 1998, he also served as a cluster leader overseeing and mentoring the principals of ten K-12 schools in the district. He began his career in education as a Biology teacher in 1996. He was presented with a Distinguished Service Award by the Council of Great City Schools in 2006.

Joe Edgens

Joe Edgens is the retired Executive Director of Facility Services of the Metropolitan Nashville Public Schools. Mr. Edgens was born in Nashville and graduated from the Nashville Public Schools. He graduated from the University of Tennessee in Knoxville with a Bachelor of Architecture degree as a member of the first graduating class from the School of Architecture at the University of Tennessee. Mr. Edgens has been licensed to practice architecture since
1974. He spent fourteen years in private architectural practice, the last three of which he had his own practice. In 1983 Mr. Edgens sold his private practice. He then worked for a contractor/developer for six years as Director of Planning and Construction. Mr. Edgens accepted the position of Director of Planning and Construction with the Metro Board of Public Education in March of 1989. In 1995 Joe was appointed to the position of Executive Director of Facilities and Operations, later changed to Executive Director of Facility Services. During his employment with Metropolitan Nashville Public schools, many departments have been under his supervision. Included in that group are Planning and Construction, Maintenance, Operations (custodians and grounds), ADA Compliance, Facility Use, Transportation, and School Security. These Departments have exceeded 1800 employees with operating budgets over $80,000,000. Since he was employed in 1989, MNPS has invested over $1,000,000,000 in capital facility improvements, which have been under his direction.

Michael Eugene

Michael Eugene is the Chief Operations Officer for the Orange County Public Schools. Prior to serving in this capacity, he served as the Business Manager for the Los Angeles Unified School District, and, the Chief Operating Officer of the Cleveland Metropolitan School District. Before joining public education, he served in the private sector as a senior management consultant, and the non-profit sector as a public policy analyst. He received his Bachelor’s degree in Political Science, and Master’s degree in Public Administration, both from Cleveland State University in Cleveland, Ohio.

Ken Gotsch

Kenneth Gotsch is the Vice Chancellor of Finance/CFO for the City Colleges of Chicago. Prior to returning to Chicago Mr. Gotsch was the Chief Financial Officer of the Los Angeles Unified School District, the nation’s second largest school system. In that capacity, he was responsible for administrative oversight of the district’s accounting, disbursements, budget services, financial planning, and school fiscal services. Mr. Gotsch was also the Chief Fiscal Officer of the Chicago Public Schools, the nation’s third largest school system. Before taking that position in 1995, he served as both the Deputy Director of the Department of Revenue’s Tax Administration and the Manager of Information Services for the City of Chicago. Prior to joining city government, he received his Master of Arts degree in Public Finance from the University of Chicago’s Irving Harris Graduate School of Public Policy and a Bachelor of Science degree in Business Administration and Finance from Marquette University.

Ascencion Juarez

Ascencion Juarez is the retired Chief Human Resources Officer of the Chicago Public Schools. The Human Resources Department of the nations’ third largest school system, the Chicago Public Schools (CPS), is responsible for the personnel transactions of more than 50,000 employees working in 632 schools, 25 Area Offices, and Central Office. Mr. Juarez’s responsibilities encompassed all aspects of an employee’s career—which includes Recruitment
and Workforce Planning, Employee Services, Payroll, Employee Records, Labor and Employee Relations, Professional Development, Principal Preparation and Development, Compensation and Benefits Management and Human Resources Information Systems. In 2005, the Department of Human Resources (HR) implemented CPS@Work, a massive restructuring initiative that resulted in a realignment of functions and responsibilities among staff and eliminated HR departmental silos, creating a cross-functional department. All transactional functions were consolidated into a newly created Employee Services Unit, which allowed other HR units to devote more of their time to working with CPS units on strategic issues. In the spring of 2007, HR implemented core PeopleSoft human capital modules and a merit-based salary increase schedule for Central Office employees. During his career with the CPS, Mr. Juarez has served as a teacher, curriculum writer, employee relations coordinator, principal, and director of Staffing and Salary Administration. A graduate of Northern Illinois University (NIU), Mr. Juarez also has a Master’s in Education from NIU and a Master’s in Administration and Supervision from Roosevelt University.

Donald Kennedy

Donald Kennedy is the interim Chief Operations Officer for the Bridgeport, Connecticut School District, supporting the interim superintendent in his efforts to improve the educational outcomes and business practices for the school district. In addition to the day-to-day leadership of the district’s business functions, much of his effort focuses on building staff capacity that will allow central office staff to design, implement, and operate effective business practices. Mr. Kennedy was formerly the Chief Financial and Operations Officer for Seattle Public Schools (SPS). In this capacity Mr. Kennedy had leadership responsibility for the school district’s business functions of Finance, Human Resources, Procurement, Information Technology, Capital Building Program, Facility Services, School Support Services, Planning and Enrollment, and other business functions. Prior to Seattle he was the Chief Financial and Administrative Officer for Charleston County School District in South Carolina. Mr. Kennedy has a BS in Accounting from Newberry College in Newberry, SC, an M.A. in Organizational Design from Seattle University, and a Certified Public Accountant certificate from the state of Alabama. Prior to entering public service Mr. Kennedy worked for the Boeing Company and Science Applications International Corporation in various financial management positions and also served as a commissioned officer in the U.S. Air Force.

Frederick Schmitt

Frederick Schmitt retired as the Chief Financial Officer of the Norfolk Public Schools (NPS) in 2008 after serving 11 years. NPS educates 35,000 children with an annual operating budget of $330 million and 6,000 full and part time employees. NPS won the Broad Foundation Prize for Urban Education in 2005. Prior to joining public education, Mr. Schmitt had a long and successful career in finance, management, and operations, including serving as a consultant with American Management Systems, Inc., and as the Chief Executive Officer (Commanding Officer) of the U.S. Coast Guard National Finance Center in Virginia. A graduate of the U.S. Coast Guard Academy, he received his MBA degree from The George Washington University. He has
been recognized for Outstanding Leadership in Urban Education by the Council of Great City Schools, and he co-chaired a major national effort with the Council to examine the effectiveness of business operations in large urban districts. Mr. Schmitt has served on a number of District Technical Assist Visits as a team member for the Council of Great City Schools.

**Tom Ryan**

**Tom Ryan** retired as the Chief Information Officer for the Albuquerque Public Schools after serving over 31 years, on both the instructional and operational sides of the district. As the CIO, Dr. Ryan has overseen the successful implementation of a new Enterprise Resource Planning system (Finance HR and Payroll), a new Student Information System, and a Learning Management Content System. He has lead the Capital Election Team successfully passing two GO elections and Mill Levy election for more than $642,000,000. Dr. Ryan holds a Ph.D in Curriculum and Instruction with an emphasis in Learning Technologies from NMSU. He is a member of several boards including: CoSN, past chair of the NM Council of Technology in Education, NM Technology Council Board member, and ISTE member. He has served as adjunct faculty for UNM designing and teaching courses online. He works with several national committees such as iNACOL, and the Council of Great City Schools and is a Senior Fellow for the Center of Digital Learning. He is a founding member of IDEAL-NM Advisory Board, which is the state K-20 and higher education online learning system. Dr. Ryan is the recipient of a Milken Educator Award. He has received several awards for technology innovation and has presented at several conferences across the country.

**Ricki-Price Baugh**

**Ricki Price-Baugh** is the Director of Academic Achievement for the Council of the Great City Schools. She was formerly the Assistant Superintendent for Curriculum in the Houston Independent School District. She was responsible for strategic planning and the design, implementation, and evaluation of the district’s curriculum and instructional initiatives for eight departments: English/language arts, fine arts, early childhood education, foreign language, health/physical education, mathematics, science, and social studies. Since beginning her work with the Houston schools thirty years ago, Dr. Price-Baugh has served as a teacher, department chair, resource coordinator, project manager, and director of curriculum services. Her major accomplishments included a district-wide effort to align curriculum, textbook, and assessment systems, and a substantial increase in student achievement scores in the district. She is a certified curriculum auditor for Phi Delta Kappa and is a member of Phi Beta Kappa. Dr. Price-Baugh has a doctoral degree from Baylor University, a master’s degree in Spanish literature from the University of Maryland, and a B. A. (magna cum laude) from Tulane University.

**Arnold Viramontes**

**Arnold Viramontes** was recently appointed to the position of Chief Information Technology Officer of the Houston Independent School District (HISD). HISD is the largest public school
system in Texas and the seventh-largest in the United States. The district operates 296 schools with approximately 202,000 students supported by almost 30,000 full and part-time employees. The General Fund annual operating budget amounts to approximately $1.6 billion. He is currently developing a blueprint for technology and information use in HISD. Before taking his current position, Mr. Viramontes was the Chief of Staff for the Dallas Independent School District, the 12th largest school district in the nation. As Chief of Staff, Mr. Viramontes oversaw eleven departments including the Transformation Management Office, the Communications/Public Relations Department, Emergency Services, Athletics Department and the Office of Evaluation and Accountability. Mr. Viramontes also served the district as Chief Transformation Officer and led the restructuring of the Dallas ISD central office. In addition, he facilitated and organized the implementation of Dallas Achieves—which includes the realignment of the curriculum at all levels and the allocation of resources more effectively. Mr. Viramontes designed a data decision process that utilizes a data warehouse with business intelligence framework. Earlier in his career, Mr. Viramontes served as the CEO of the Viramontes Group, Inc. (VGI), a technology and corporate consulting company he began in 1972, serving clients in the United States, Mexico and South America. Prior to VGI, Arnold was the initial Executive Director of the Telecommunications Infrastructure Fund Board (TIF), an agency created by the Texas Public Utility Regulatory Act of 1995. Mr. Viramontes managed the nation’s largest program for investing in telecommunications infrastructure for Internet access and videoconferencing. TIF was charged with disbursing up to $1.5 billion over a ten-year period to be used to link Texas schools, libraries, higher education institutions, and not-for-profit health care facilities to an advanced telecommunications infrastructure. He is also a Senior Research Fellow to the IC² Institute at the University of Texas, an organization whose mission is to foster technology, entrepreneurship and education.

Denise Walston

Denise Walston is the Director of Mathematics for the Council of the Great City Schools. She has served on numerous Council of Great City Schools support teams in the area of curriculum, instruction, and professional development. She provides member districts support for improving student achievement and for implementing the Common Core State Mathematics Standards.

She retired from Norfolk Public Schools as the Senior Coordinator of K-12 Mathematics. Her responsibilities included the development of a K-12 mathematics curriculum; providing job-embedded professional development; and leveraging resources to support teacher leaders and administrators. During her tenure, Norfolk Public Schools embarked on an Algebra For ALL initiative which resulted in more than 50% of students completing algebra by the end of grade eight while simultaneously improving student achievement and closing achievement gaps in mathematics. She has also served as an adjunct instructor with Old Dominion University. She is also currently the 1st Vice-President of the National Council for Mathematics Supervision and is on the Board of the Virginia Mathematics and Science Coalition.

Ms. Walston received her B.A. degree from The University of North Carolina at Greensboro in mathematics and history and her M.Ed. in mathematics education from Old Dominion University.
APPENDIX B. WORKING AGENDA

Strategic Support/Technical Assistance Team
Organizational Review
Charlotte-Mecklenburg Schools
August 14-17, 2012
Contact: Earnest Winston
Chief of Staff
Email: earnest.winston@cms.k12.nc.us

Tuesday, August 14
Group Team Arrival
Hilton Garden Inn Downtown
508 E. Martin Luther King Jr. Blvd.
Charlotte, NC 28202

6:30 p.m.
Group Dinner Meeting

Wednesday, August 15

7:30 - 8:00 a.m.
Group Team Continental Breakfast
CMGC
5th Floor, CMGC 527/528
600 E. Fourth St., Charlotte, NC, 28262

8:00 - 9:15 a.m.
Group Team Interviews
CEO Perspective
Heath Morrison
Superintendent

9:30 - 10:45 a.m.
Group Team Interviews
Executive Cabinet
Main Conference Room 527/528
Millard House
Chief Operating Officer
Sheila Shirley
Chief Financial Officer
Dan Habrat
Chief Human Resources Officer
Kay Hall
Chief Information Officer
Frank Barnes
Chief Accountability Officer
Earnest Winston
Chief of Staff
Guy Chamberlain
Assoc. Supt., Auxiliary Services
LaTarzja Henry
Mgt.

11:00 - 12:00  Group Team Discussion and Modifications to Work Plan
Main Conference Room 527/528

12:00 - 1:00 p.m.  Working Luncheon 527/528

Best Practices and Organizational Effectiveness and Efficiencies

1:00 - 2:15 p.m.  Management Team Interviews
Main Conference Room 527
Frank Barnes
Chief Accountability Officer
Vacant
Ex. Dir., State & Federal Programs
Lynne Tingle
Ex. Dir., Research, Analysis,

C&I Team Interview
Conference Room 501
Kathy Meads
Ex. Dir., ESL

Finance Team Interview
Conference Room 515
Sheila Shirley
Chief Financial Officer

Operations Team Interview
Conference Room 546
Millard House
Chief Operating Officer

HR Team Interview
Conference Room 528
Dan Habrat
Chief Human Resources Officer

IT Team Interview
Conference Room 587
Kay Hall
Chief Information Officer & Dir., Business Systems

2:30 - 3:45 p.m.  Management Team Interviews
Main Conference Room 527
Kelly Gwaltney
Kit Rea
Dawn Robinson
Charity Bell
Tyler Ream
Denise Watts
Zone Superintendents

Jane Rhyne
Assistant Superintendent

C&I Team Interviews
Conference Room 501

Anna Renfro
Ex. Dir., Curriculum Support

___________________

Reports

Curriculum Support Direct

Deb Kaclik
Dir., Curriculum Support

Vanessa McBayne
Director, Academic Services

Finance Team Interviews
Conference Room 515

Dennis Covington
Ex Dir., Budget Development

Andrea Gillus-Jackson
Director, Budget Development

Operations Team Interview
Conference Room 546

Guy Chamberlain
Assoc. Supt., Auxiliary Svcs.

HR Team Interviews
Conference Room 528

Kim Brazzell
Ex. Dir., Workforce

Muriel O’Leary
Dir., Licensure

Teresa Shipman
Ex. Dir., Performance

Management

IT Team Interviews
Conference Room 587

Cindee Matson
Dir., Information Systems

___________________

Assistant Directors

___________________

Project Managers

4:00 - 5:15 p.m.

Management & IT Teams
Interviews
Main Conference Room 527

Accountability Staff

Danielle Miller
Dir., Center for I,V and I

Lynne Tingle
Ex. Dir., Research, Analysis

C&I Team Interviews
Conference Room 501

Jane Rhyne
Assistant Superintendent
Stacie Levi
Dir., Administrative Svcs.
Laura Hamby
Dir., Educational Svcs.

Finance Team Interview
Conference Room 515

Lu Ellen Richard
Ex Dir., Financial Services

Operations Team Interviews
Conference Room 546

Mike Raible
Ex. Dir., Planning & PM
Dennis LaCaria
Dir., Facilities Planning & Real Estate

Denise Cavoly
Ex. Coor., Project Management

HR Team Interviews
Conference Room 528

Andy Baxter
Dir., Human Capital Strategies
Tom Tomberlin
Sr. Human Capital Analyst
Eleanor Reali
Project Manager, Human

Jaronica Howard
Program Manager

IT Team Interviews
Conference Room 587

Susan Manning
Dir., Data Operations

__________________________
Asst. Dir., Operations

__________________________
Asst. Dir., Help Desk

__________________________
Security Administrator

__________________________
Database Administrator

5:30 p.m.
Group Team Discussion of Work Plan 527/528

Thursday, August 16
7:30 - 8:00 a.m.
Group Team Continental Breakfast
Main Conference Room 527/528

8:00 - 9:15 a.m.
Management Team Interviews
Main Conference Room 527
Representatives, Business & Foundation Communities

C&I Team Interviews
Ron Thompson
Conference Room 501

Finance Team Interviews
Conference Room 515

**Ex. Dir., Federal, State Programs**

Title I Directors

**Mike Martin**
Dir., Payroll

Operations Team Interviews
Conference Room 546

**Phil Berman**
Ex. Dir., Building Svcs, Property Management

**Phil Goodman**
Dir., Property Management

**Mark Jones**
Dir., Maintenance

**Rusty Fuller**
Mgr., Custodial Svcs.

**Shawn Turner**
Mgr., Environmental Svcs.

**Keith Bardsley**
Mgr., Mobile Management

HR Team Interviews
Conference Room 528

**Vincent Smith**
Ex. Dir., HR Administration

**Eileen Drehs**
Benefits Manager

**Jan Richardson**
Dir., HRIS Support

IT Team Interviews
Conference Room 587

**Jay Parker**
Dir., Student Applications

Asst. Dir., NCWise

Help Desk Coordinator

Sr. Systems Analyst

Sr. Programmer Analyst

Manager, Student Data

9:30 - 10:45 a.m.

Management Team Interviews
Main Conference Room 527

Representatives, Parent Groups
### C&I Team Interviews
Conference Room 501

**Christiana Efird**
Dir., Teacher Pro. Development

**Rashidah Morgan**
Dir., Leadership

### Finance & Operations Teams Interviews
Conference Room 546

**Ronnie Greene**
Ex. Dir., Procurement Svcs.

**Greg Bame/Jim Thomassen**
Senior Purchasing Agent(s)

---

Procurement Card Manager

**Chiquitha Lloyd**
MWSBE Administrator

**Sandy Fish**
Exec. Dir., Inventory

---

**Sheila Person-Scott**
Dir., HR Management Team

---

HR Manager

---

HR Analyst

### IT Team Interviews
Conference Room 587

**Vacant**
Dir., Instructional Tech.

**Gloria Miller**
Dir., Media Svcs.

### Management

11:00 - 12:15 a.m.

**LaTanzia Henry**
Exec. Dir., Communications

**Karen Thomas**
Ex. Dir., Student Svcs.

---

Student Svcs., Direct Reports

**Betty Mathis**
Dir., Accounting & Auditing

**Carol Stamper**
Ex. Dir., Transportation

---

Manager, Operations

Manager, Fleet
Manager, Routing & Scheduling

Support Manager

**HR Team Interviews**

Jennifer Miller  
Ex. Dir., Talent Acquisition

Kim Brazzell  
Ex. Dir., Workforce

**IT Team Interviews**

IT Business Systems  
Functional Directors, Bus.

**Systems**

**12:30 - 1:30 p.m.**  
Working Luncheon 527/528

**1:30 - 2:30 p.m.**

Management Team Revisit  
Work Plan & Follow Up  
Main Conference Room 527

C&I Team Interviews  
Conference Room 501

Finance Team Interviews  
Conference Room 515

Operations Team Interviews  
Conference Room 546

Ann Clark  
Deputy Superintendent

Lydia Nabors  
Dir., Accounts Payable

Nancy Doty  
Supvr., Accounts Payable

Cindy Hobbs  
Ex. Dir., Child Nutrition

Asst. Dir., Child Nutrition

Dir., Special Programs

Program Specialist

Facilities Specialist
HR Interviews  
with M. Contompasis  
Revisit Work Plan & Follow Up  
Conference Room 528

IT Teams Revisit  
Work Plan & Follow Up  
Conference Room 587

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
<th>Participants</th>
</tr>
</thead>
</table>
| 2:45 - 3:45 p.m. | C&I Team Interviews          | Conference Room 501 | Susan Norwood (Ex. Dir., TIF/LEAP)  
Paul Holden (Ex. Dir., Community Svcs.)  
Coor., Community Svcs. |
| 4:00 - 5:00 p.m. | Management, HR & IT Follow Ups | Conference Room 501 | Julie Babb (Dir., Pre-K)  
Kathleen Koch (Dir., Adv, Studies)  
Jeff Linker (Dir., Magnets)  
Jimmy Chancey (Dir., Career Education) |

Finance Team Follow Up

Operations Team Interviews  
Conference Room 546

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
<th>Participants</th>
</tr>
</thead>
</table>
| 4:00 - 5:00 p.m. | Operations Team Interviews | Conference Room 546 | Scott McCully (Ex. Dir., Student Planning)  
Michele Aikens (Dir., Student Placement)  
Lisa Barnes (Ex. Dir., Alternative Ed.)  
Sue Doran (Athletics Director)  
Bud Cesena (Chief of Police)  
Randy Hagler (Deputy Chief of Police) |

Management, HR & IT Follow Ups

C&I Team Interviews  
Conference Room 501

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
<th>Participants</th>
</tr>
</thead>
</table>
| 4:00 - 5:00 p.m. | C&I Team Interviews          | Conference Room 501 | Julie Babb (Dir., Pre-K)  
Kathleen Koch (Dir., Adv, Studies)  
Jeff Linker (Dir., Magnets)  
Jimmy Chancey (Dir., Career Education) |

Management, Finance, Operations, HR & IT Team Interviews  
Main Conference Room 527/528

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
<th>Participants</th>
</tr>
</thead>
</table>
| 4:00 - 5:00 p.m. | Management, Finance, Operations, HR & IT Team Interviews | Main Conference Room 527/528 | ES, MS, HS Principals  
Randomly Selected |
Friday, August 17

7:00 - 7:30 a.m.  Group Team Continental Breakfast  
Main Conference Room 527/528

7:30 – 12:00 Noon.  Group Team Working Meeting  Synthesis of Findings & Recommendations  
Main Conference Room 527/528

1:45 - 2:30 p.m.  Group Team Working Luncheon  Heath Morrison  
Main Conference Room 527/528  Superintendent  Others  TBD

2:30 p.m.  Adjournment & Departures
APPENDIX C. DOCUMENTS REVIEWED

General Materials Reviewed

- Charlotte-Mecklenburg Schools 2012-2013 Organization Chart, July 2012

Curriculum and Instruction Materials Reviewed

- Board of Education Executive Summary: Talent Development/Advanced Studies/Advancement Via Individual Determination, April 24, 2012
- Summary of: Charlotte-Mecklenburg Schools 2012-2013 Application for State and Federal Funding for Secondary Career and Technical Education (CTE) Programs and Services
- Board of Education Executive Summary: English as a Second Language Student Education, April 24, 2012
- Board of Education Executive Summary: Humanities Department, February 28, 2012
- Board of Education Executive Summary: Pre-K-12 Support Services, May 8, 2012
- Board of Education Executive Summary: Curriculum and Instruction: STEM, February 28, 2012
- Board of Education Executive Summary: Graduation Cohort Report, October 11, 2011
- The Common Core and Essential Standards in CMS: Board of Education Presentation, June 6, 2012
- Board of Education Executive Summary: Teacher incentive Fund-Leadership for Educators’ Advanced Performance, March 13, 2012
- 2012-2013 Charlotte-Mecklenburg Schools Title I Part A District Set-Asides
- Executive Summary, Title I Programs
- Succession Planning and Leadership Development, Board Report, September 13, 2011
- 2011 Charlotte Mecklenburg Youth Risk Behavior Survey: Health Risk Behaviors for High School Students
- 2011 Charlotte Mecklenburg Youth Risk Behavior Survey: Health Risk Behaviors for Middle School Students
- Success Stories: Alliance for a Healthier Generation, 2011-2012
- Got the Shot? Flyer
- Academic Services 2010-11 Adopted Budget
- CWT Evaluator-Winding Spring Elementary
- After School Enrichment Program, Colette Jeffries, 2012
- Healthy Schools, Healthy Students Flyer
- Alliance Healthy Schools Program: Fall 2012 Workshop Training
- CMS JROTC Informational Paper, July 2012
- JROTC Awards Ceremony Flyer
- Teacher Professional Development Department Overview and Schedule
- List of Links to Policies that Apply to Instruction
- Wellness Wins Description
- Charlotte-Mecklenburg Schools Student Wellness Regulations JL-R
- Freedom & Flexibility with Accountability
- Middle School Non-Negotiables for Instructional Improvement and Increased Student Achievement through PLCs
- High School School Non-Negotiables for Instructional Improvement and Increased Student Achievement through PLCs
- CMS Middle School Planning Guide
- Program Standards for Serving Students with Disabilities Roles and Responsibilities
- CMS High School Planning Guide
- A-Z Manual (on-line Exceptional Children website)
- Sample webpages materials from Exceptional Children website
- Exceptional Children Department Professional Development Work Plan 2012-2013
- Targeted Assistance: Title I, SIG and RT3 Instructional Support Coaching
- CMS Strategic Plan 2014-Teaching Our Way to the Top: Rubrics for Identifying Schools to Receive LEA Improvement Coaching Assistance
- Instructional Coaching Standards (Title I)
- 2011-2012 Performance Management Scorecard, Federal and State Compliance
- 2012-2013 Intervention Support for ESEA Waiver, School Improvement Grant (SIG), Race to the Top (RT3), and Title I Schools
- Single-Gender Program Review
- 2012-13 Charlotte-Mecklenburg Schools: Reward, Priority and Focus Schools
- CMS Schools LEA Rubric: CMS Schools Ranked from Highest to Lowest Point Values (Title I)
- Tactic Management Plan (Teacher Professional Development)
- Webpage : Welcome to the NC Professional Teaching standards PD Database
- LEAP: Lateral Entry Advancement Program: The CMS Lateral Entry Teachers’ Pre-Service Experience
- New Teacher Academy I
- North Carolina Mentor Training 2010-2011 PowerPoint
- CMS On-Line Professional Development Modules list
- Urban Education Course: Overview of Diversity Topics
- How to Navigate MyPD, Version 6.1
- Teacher Professional Development 2012 Fall Class Schedule
- Charlotte-Mecklenburg Schools New Teacher Induction Program
- Teaching & Learning Domain
- Teacher Professional Development Program Structure
- PreK-12 Support Services Board of Education Presentation, May 8, 2012
- CMS Strategic Plan 2014: White Paper
- The Road to Reform: White Paper
- Performance Management: White Paper
- Charlotte-Mecklenburg Schools: White Paper

© 2012 - Council of the Great City Schools
• Freedom and Flexibility with Accountability: White Paper
• Effective Educators: White Paper
• Fast Facts
• Section 504 Overview
• Truancy Court Model Brochure
• Social Work Department
• CMS Super Standards for School Leaders

Finance Material Reviewed

• Operating Budgets (various years)
  o Finance Office budget presentations to board, Aspin Institute
• CAFRs (various years)
• Finance Office departments Balanced Scorecards
• Strategic Plan 2014: Teaching Our Way to the Top
  o Coherence Document dated May 10, 2012
  o Narrative
  o Key Strategy Document updated 2/16/12
• Organization Charts
• CMS Purchasing Benchmark Study
• Auxiliary Services Continuous Improvement Plan – Capital Program Services Department
• Standard Operating Procedures; Talent Effectiveness Project, July 2012
• Standard Operating Procedure; Strategic Planning Process Procedures, 9/29/10
• Procurement Office Policy and Procedures Manual and communications documents

Management Materials Reviewed

• Strategic Plan 2014
  o Focus Document
• CMS Fast Facts
• Guide to Magnet Schools 2009 – 2010

Operations Material Reviewed

• Work Order Process Procedure, 2/26/11
• Professional Development For Teachers, Principals, And District Leaders, 6/7/2010
• Strategic Plan 2014: Teaching Our Way to the Top
• PMOC Update Template

Information Technology Materials Reviewed

© 2012 - Council of the Great City Schools 43
• 18-Wireless School Install Progress
• 34-Wireless School Install Progress
• AMTR Process
• CGCS presentation, new format
• clientele
• CMS Compliance Details and Responsibilities 8.16.2012.doc
• CMS E-Rate Disbursement History
• Dr. Carver TOTAL ISS
• E-Rate & CIPA powerpoint presentation April 2012.
• Grant Recipient Install Progress
• IS&S Equipment procedures 7.17.2012
• Network & related equipment installs SOW
• Nortel-Cisco Cabled Schools Log
• Phase VI Project Scope
• Phase VIII - Wireless School Install Progress
• Process for Interactive Whiteboard Bulb Replacement
• ServiceRequestChart8_08_11.
• slarevision4_08_08_11
• Summer 2012 Project Spreadsheet
• VoIP Procedures
• What is E-Rate

Human Resources Materials Reviewed

• New Employee Handbook
• CMS – My HQ Now Report
• HS teacher allotment Formulas
• 2012- 2013, Allotment Projections
• Guiding Principles for Position Exchange Process
• Talent Effectiveness Program 2011-2014 Project Plan
• CMS Human Resources July 2012, Management Oversight Report

APPENDIX D. DISTRICT PERSONNEL INTERVIEWED

• Heath Morrison, Superintendent
• Ann Clark, Deputy Superintendent
• Guy Chamberlin, Associate Superintendent, Auxiliary Services
• Jane Rhyne, Assistant Superintendent, Exceptional Children and Zone Superintendent
• Millard House, Chief Operating Officer
• Sheila Shirley, Chief Financial Officer
• Dan Habrat, Chief Human Resources Officer
• Kay Hall, Chief Information Officer
• Frank Barnes, Chief Accountability Officer
• Earnest Winston, Chief of Staff
• Dawn Robinson, Zone Superintendent
• Denise Watts, Zone Superintendent
• Kelly Gwaltney, Zone Superintendent
• Kit Rea, Zone Superintendent
• Tyler Ream, Zone Superintendent
• Charity Bell, Zone Superintendent
• Amy Harkey, Assistant Director, Nutrition Services
• Andy Baxter, Dir., Human Capital Strategies
• Anna Nelson, Business Community Representative
• Anna S. Renfro, Executive Director, PreK-12 Curriculum Support Programs
• Barbara Reid Ruiz, District Data Warehouse Designer
• Betty DeWitt, Capital Projects Analyst
• Betty Mattos- Director Accounting and Auditing
• Bill Anderson, Business Community Representative
• Billy Jackson, Business Systems – HR
• Brenda Kendrick, Specialist Social Work
• Brenda Portillo, Instructional Recruiter
• Brenda Steadman, Principal
• Bud Cesena, Chief of Police
• Carol Stamper, Executive Director of Transportation
• Carolyn Gaither, Specialist, School Psychologist Services
• Cathy Beam, Program Specialist, Nutrition Services
• Cedrick Canty, Assistant Director
• Cheryl Robinson, School Counseling Specialist
• Chiquitha Lloyd, MWSBE Administrator
• Christina Efird|Director of Teacher Professional Development
• Cindee Matson, Director, Information Systems
• Cindy Hobbs, Executive Director, Child Nutrition
• Cynthia Vines, District Section 504 Compliance Specialist
• Danielle Miller, Director (Accountability Office)
• David Brigman, Director of Lawson – Procurement
• David Reed, Business Systems (Consultant)
• Deb Kaclik, Director of Arts, Health, Physical Education and PreK-12 Curriculum Support Programs
• Debra Wyckoff, Transportation Support Manager, Transportation Department
• Denise Cavoly, Executive Coordinator, Project Management
- Dennis Covington- Executive Director Budget development and Management Services
- Dennis LaCaria, Director, Facilities & Real Estate
- Devery Peterson, Safety and Training Specialist, Transportation Department
- Donna Jessup, Instructional Technology (IT)
- Eileen Drehs, Benefits Manager
- Eleanor Reala, Project Manager
- Eric Ward, Principal
- Gerald Mills, Facilities and Equipment Specialist, Nutrition Services
- Glen McCorkle, Assistant Director, Operations
- Gloria Miller, Director, Media Services (C &I)
- Greg Bame- Senior Purchasing Agent
- Ilana Jones, Instructional Technology (IT)
- Jacki Summey, Non-Instructional Recruiter
- Janet Hamilton, Executive Director, Employee Relations
- Jaronica Howard, Program Manager TEP
- Jay Parker, Director, Student Applications & Web Development
- Jeff Jackson- Director Warehouse operations
- Jeff Linker, Director, Magnet Programs
- Jennifer Miller, Executive Director, Talent Acquisition
- Jennifer Pearsall, Director, ESL Student Education
- Jerry Winkeljohn, Director of Special Projects, Nutrition Services
- Jessica Harris, Project Manager
- Jill Near, HRIS Support
- Jim Thomassen- Senior Purchasing Agent
- Joey Burch, Principal
- Johanna Henderson, Business Community Representative
- Judy Consoli, Lawson System Administrator (Consultant)
- Julie Babb, Director, Pre-Kindergarten Programs
- Karen H. Thomas, Executive Director, Pre-K Support Services
- Kathryn Block, Director, Quality Management
- Katherine Meads, Executive Director, ESL Student Education
- Kathleen Koch, Director, Advanced Studies
- Keith Bardsley, Project Manager Mobile Classrooms
- Ken Kennedy, Senior System Engineer
- Kim Brazzell, Executive Director, Workforce Management
- LaTarzja Henry, Executive Director of Communications
- Laura Hamby, Director of Exceptional Children for Educational Services
- Lee Herbert, Project Manager
• Lisa Barnes, Executive Director, Alternative Education
• Lu Ellen Richard- Executive Director Financial Services
• Lydia Nabor- Director Accounts Payable
• Lynne Tingle, Executive Director of Research & Analysis
• Mark Jones, Interim Director of Maintenance
• Marsha Nicholson, Assistant Director, Help Desk
• Michele Aikens, Director, Student Placement
• Michael Provissiero - HRIS
• Mike Martin- Director Payroll
• Mike Raible, Executive Director, Planning and Project Management
• Muriel O’Leary, Director, Licensure
• Nancy Doty- Supervisor Accounts Payable
• Paul Holden, Executive Director, Parent University-Family and Community Services
• Phil Berman, Executive Director, Building Services
• Phil Goodman, Director of Property and Quality
• Rashidah Lopez-Morgan, Director of Leadership Strategy
• Ron Thompson, Executive Director of Federal, State and Compliance
• Ronnie Greene- Executive Director Procurement Services
• Rusty Fuller, Director of Custodial Services
• Sandy Fish- Executive Director Inventory Management
• Scott McCully, Executive Director, Student Planning
• Sharon Mazurek, Principal
• Sharon Wilson, Instructional Technology (IT)
• Sheila Person-Scott, Director, HR Management
• Stacie Levi, Director of Exceptional Children for Administrative Services
• Sue Doran, Athletics Director
• Susan Manning, Data Center
• Susan Patterson, Business Community Representative
• Teresa Shipman, Executive Director, Performance Management
• Tim Tinkham, Business Systems (Consultant)
• Tom Stikeleather, Assistant Director
• Tom Tomberlin, Project Lead Instructional TEP
• Toni Perry, Principal
• Tracey Pickard, Principal
• Vanessa Ashford, Principal
• Vincent Smith, Executive Director, HR Administration
• Representatives of Parent Groups
## APPENDIX E. COUNCIL REVIEWS

<table>
<thead>
<tr>
<th>City</th>
<th>Area</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albuquerque</td>
<td>Facilities and Roofing</td>
<td>2003</td>
</tr>
<tr>
<td></td>
<td>Human Resources</td>
<td>2003</td>
</tr>
<tr>
<td></td>
<td>Information Technology</td>
<td>2003</td>
</tr>
<tr>
<td></td>
<td>Special Education</td>
<td>2005</td>
</tr>
<tr>
<td></td>
<td>Legal Services</td>
<td>2005</td>
</tr>
<tr>
<td></td>
<td>Safety and Security</td>
<td>2007</td>
</tr>
<tr>
<td>Anchorage</td>
<td>Finance</td>
<td>2004</td>
</tr>
<tr>
<td></td>
<td>Communications</td>
<td>2008</td>
</tr>
<tr>
<td></td>
<td>Math Instruction</td>
<td>2010</td>
</tr>
<tr>
<td></td>
<td>Food Services</td>
<td>2011</td>
</tr>
<tr>
<td></td>
<td>Organizational Structure</td>
<td>2012</td>
</tr>
<tr>
<td>Atlanta</td>
<td>Facilities</td>
<td>2009</td>
</tr>
<tr>
<td></td>
<td>Transportation</td>
<td>2010</td>
</tr>
<tr>
<td>Austin</td>
<td>Special Education</td>
<td>2010</td>
</tr>
<tr>
<td>Baltimore</td>
<td>Information Technology</td>
<td>2011</td>
</tr>
<tr>
<td>Birmingham</td>
<td>Organizational Structure</td>
<td>2007</td>
</tr>
<tr>
<td></td>
<td>Operations</td>
<td>2008</td>
</tr>
<tr>
<td></td>
<td>Facilities</td>
<td>2010</td>
</tr>
<tr>
<td>Boston</td>
<td>Special Education</td>
<td>2009</td>
</tr>
<tr>
<td>Bridgeport</td>
<td>Transportation</td>
<td>2012</td>
</tr>
<tr>
<td>Broward County (FL)</td>
<td>Information Technology</td>
<td>2000</td>
</tr>
<tr>
<td></td>
<td>Food Services</td>
<td>2009</td>
</tr>
<tr>
<td></td>
<td>Transportation</td>
<td>2009</td>
</tr>
<tr>
<td></td>
<td>Information Technology</td>
<td>2012</td>
</tr>
<tr>
<td>Buffalo</td>
<td>Superintendent Support</td>
<td>2000</td>
</tr>
<tr>
<td></td>
<td>Organizational Structure</td>
<td>2000</td>
</tr>
<tr>
<td></td>
<td>Curriculum and Instruction</td>
<td>2000</td>
</tr>
<tr>
<td></td>
<td>Personnel</td>
<td>2000</td>
</tr>
<tr>
<td></td>
<td>Facilities and Operations</td>
<td>2000</td>
</tr>
<tr>
<td></td>
<td>Communications</td>
<td>2000</td>
</tr>
<tr>
<td>Location</td>
<td>Topic</td>
<td>Year</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>----------------------------</td>
<td>---------</td>
</tr>
<tr>
<td>Caddo Parish (LA)</td>
<td>Facilities</td>
<td>2004</td>
</tr>
<tr>
<td>Charleston</td>
<td>Special Education</td>
<td>2005</td>
</tr>
<tr>
<td>Charlotte-Mecklenburg</td>
<td>Human Resources</td>
<td>2007</td>
</tr>
<tr>
<td>Cincinnati</td>
<td>Curriculum and Instruction</td>
<td>2004</td>
</tr>
<tr>
<td></td>
<td>Curriculum and Instruction</td>
<td>2009</td>
</tr>
<tr>
<td>Chicago</td>
<td>Warehouse Operations</td>
<td>2010</td>
</tr>
<tr>
<td></td>
<td>Special Education</td>
<td>2011</td>
</tr>
<tr>
<td>Christina (DE)</td>
<td>Curriculum and Instruction</td>
<td>2007</td>
</tr>
<tr>
<td>Cleveland</td>
<td>Student Assignments</td>
<td>1999, 2000</td>
</tr>
<tr>
<td></td>
<td>Transportation</td>
<td>2000</td>
</tr>
<tr>
<td></td>
<td>Safety and Security</td>
<td>2000</td>
</tr>
<tr>
<td></td>
<td>Facilities Financing</td>
<td>2000</td>
</tr>
<tr>
<td></td>
<td>Facilities Operations</td>
<td>2000</td>
</tr>
<tr>
<td></td>
<td>Transportation</td>
<td>2004</td>
</tr>
<tr>
<td></td>
<td>Curriculum and Instruction</td>
<td>2005</td>
</tr>
<tr>
<td></td>
<td>Safety and Security</td>
<td>2007</td>
</tr>
<tr>
<td></td>
<td>Safety and Security</td>
<td>2008</td>
</tr>
<tr>
<td></td>
<td>Theme Schools</td>
<td>2009</td>
</tr>
<tr>
<td>Columbus</td>
<td>Superintendent Support</td>
<td>2001</td>
</tr>
<tr>
<td></td>
<td>Human Resources</td>
<td>2001</td>
</tr>
<tr>
<td></td>
<td>Facilities Financing</td>
<td>2002</td>
</tr>
<tr>
<td></td>
<td>Finance and Treasury</td>
<td>2003</td>
</tr>
<tr>
<td></td>
<td>Budget</td>
<td>2003</td>
</tr>
<tr>
<td></td>
<td>Curriculum and Instruction</td>
<td>2005</td>
</tr>
<tr>
<td></td>
<td>Information Technology</td>
<td>2007</td>
</tr>
<tr>
<td></td>
<td>Food Services</td>
<td>2007</td>
</tr>
<tr>
<td></td>
<td>Transportation</td>
<td>2009</td>
</tr>
<tr>
<td>Dallas</td>
<td>Procurement</td>
<td>2007</td>
</tr>
<tr>
<td></td>
<td>Staffing Levels</td>
<td>2009</td>
</tr>
<tr>
<td>Dayton</td>
<td>Superintendent Support</td>
<td>2001</td>
</tr>
<tr>
<td></td>
<td>Curriculum and Instruction</td>
<td>2001</td>
</tr>
<tr>
<td>Administrative Organization</td>
<td>Year</td>
<td></td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>------</td>
<td></td>
</tr>
<tr>
<td>Finance</td>
<td>2001</td>
<td></td>
</tr>
<tr>
<td>Communications</td>
<td>2002</td>
<td></td>
</tr>
<tr>
<td>Curriculum and Instruction</td>
<td>2005</td>
<td></td>
</tr>
<tr>
<td>Budget</td>
<td>2005</td>
<td></td>
</tr>
<tr>
<td>Curriculum and Instruction</td>
<td>2008</td>
<td></td>
</tr>
<tr>
<td>Denver</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Superintendent Support</td>
<td>2001</td>
<td></td>
</tr>
<tr>
<td>Personnel</td>
<td>2001</td>
<td></td>
</tr>
<tr>
<td>Curriculum and Instruction</td>
<td>2005</td>
<td></td>
</tr>
<tr>
<td>Bilingual Education</td>
<td>2006</td>
<td></td>
</tr>
<tr>
<td>Curriculum and Instruction</td>
<td>2008</td>
<td></td>
</tr>
<tr>
<td>Des Moines</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Budget and Finance</td>
<td>2003</td>
<td></td>
</tr>
<tr>
<td>Detroit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Curriculum and Instruction</td>
<td>2002</td>
<td></td>
</tr>
<tr>
<td>Assessment</td>
<td>2002</td>
<td></td>
</tr>
<tr>
<td>Communications</td>
<td>2002</td>
<td></td>
</tr>
<tr>
<td>Curriculum and Assessment</td>
<td>2003</td>
<td></td>
</tr>
<tr>
<td>Communications</td>
<td>2003</td>
<td></td>
</tr>
<tr>
<td>Textbook Procurement</td>
<td>2004</td>
<td></td>
</tr>
<tr>
<td>Food Services</td>
<td>2007</td>
<td></td>
</tr>
<tr>
<td>Curriculum and Instruction</td>
<td>2008</td>
<td></td>
</tr>
<tr>
<td>Facilities</td>
<td>2008</td>
<td></td>
</tr>
<tr>
<td>Finance and Budget</td>
<td>2008</td>
<td></td>
</tr>
<tr>
<td>Information Technology</td>
<td>2008</td>
<td></td>
</tr>
<tr>
<td>Stimulus planning</td>
<td>2009</td>
<td></td>
</tr>
<tr>
<td>Fresno</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Curriculum and Instruction</td>
<td>2012</td>
<td></td>
</tr>
<tr>
<td>Guilford County</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bilingual Education</td>
<td>2002</td>
<td></td>
</tr>
<tr>
<td>Information Technology</td>
<td>2003</td>
<td></td>
</tr>
<tr>
<td>Special Education</td>
<td>2003</td>
<td></td>
</tr>
<tr>
<td>Facilities</td>
<td>2004</td>
<td></td>
</tr>
<tr>
<td>Human Resources</td>
<td>2007</td>
<td></td>
</tr>
<tr>
<td>Hillsborough County (ex)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transportation</td>
<td>2005</td>
<td></td>
</tr>
<tr>
<td>Procurement</td>
<td>2005</td>
<td></td>
</tr>
<tr>
<td>Houston</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Facilities Operations</td>
<td>2010</td>
<td></td>
</tr>
<tr>
<td>Capital Program</td>
<td>2010</td>
<td></td>
</tr>
<tr>
<td>Information Technology</td>
<td>2011</td>
<td></td>
</tr>
<tr>
<td>Procurement</td>
<td>2011</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Department</td>
<td>Year</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>Indianapolis</td>
<td>Transportation</td>
<td>2007</td>
</tr>
<tr>
<td></td>
<td>Information Technology</td>
<td>2010</td>
</tr>
<tr>
<td>Jackson (MS)</td>
<td>Bond Referendum</td>
<td>2006</td>
</tr>
<tr>
<td></td>
<td>Communications</td>
<td>2009</td>
</tr>
<tr>
<td>Jacksonville</td>
<td>Organization and Management</td>
<td>2002</td>
</tr>
<tr>
<td></td>
<td>Operations</td>
<td>2002</td>
</tr>
<tr>
<td></td>
<td>Human Resources</td>
<td>2002</td>
</tr>
<tr>
<td></td>
<td>Finance</td>
<td>2002</td>
</tr>
<tr>
<td></td>
<td>Information Technology</td>
<td>2002</td>
</tr>
<tr>
<td></td>
<td>Finance</td>
<td>2006</td>
</tr>
<tr>
<td>Kansas City</td>
<td>Human Resources</td>
<td>2005</td>
</tr>
<tr>
<td></td>
<td>Information Technology</td>
<td>2005</td>
</tr>
<tr>
<td></td>
<td>Finance</td>
<td>2005</td>
</tr>
<tr>
<td></td>
<td>Operations</td>
<td>2005</td>
</tr>
<tr>
<td></td>
<td>Purchasing</td>
<td>2006</td>
</tr>
<tr>
<td></td>
<td>Curriculum and Instruction</td>
<td>2006</td>
</tr>
<tr>
<td></td>
<td>Program Implementation</td>
<td>2007</td>
</tr>
<tr>
<td></td>
<td>Stimulus Planning</td>
<td>2009</td>
</tr>
<tr>
<td>Little Rock</td>
<td>Curriculum and Instruction</td>
<td>2010</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>Budget and Finance</td>
<td>2002</td>
</tr>
<tr>
<td></td>
<td>Organizational Structure</td>
<td>2005</td>
</tr>
<tr>
<td></td>
<td>Finance</td>
<td>2005</td>
</tr>
<tr>
<td></td>
<td>Information Technology</td>
<td>2005</td>
</tr>
<tr>
<td></td>
<td>Human Resources</td>
<td>2005</td>
</tr>
<tr>
<td></td>
<td>Business Services</td>
<td>2005</td>
</tr>
<tr>
<td>Louisville</td>
<td>Management Information</td>
<td>2005</td>
</tr>
<tr>
<td></td>
<td>Staffing study</td>
<td>2009</td>
</tr>
<tr>
<td>Memphis</td>
<td>Information Technology</td>
<td>2007</td>
</tr>
<tr>
<td>Miami-Dade County</td>
<td>Construction Management</td>
<td>2003</td>
</tr>
<tr>
<td></td>
<td>Food Services</td>
<td>2009</td>
</tr>
<tr>
<td></td>
<td>Transportation</td>
<td>2009</td>
</tr>
<tr>
<td></td>
<td>Maintenance &amp; Operations</td>
<td>2009</td>
</tr>
<tr>
<td></td>
<td>Capital Projects</td>
<td>2009</td>
</tr>
<tr>
<td>Location</td>
<td>Department</td>
<td>Year</td>
</tr>
<tr>
<td>-------------------</td>
<td>-------------------------------------</td>
<td>-------</td>
</tr>
<tr>
<td>Milwaukee</td>
<td>Research and Testing</td>
<td>1999</td>
</tr>
<tr>
<td></td>
<td>Safety and Security</td>
<td>2000</td>
</tr>
<tr>
<td></td>
<td>School Board Support</td>
<td>1999</td>
</tr>
<tr>
<td></td>
<td>Curriculum and Instruction</td>
<td>2006</td>
</tr>
<tr>
<td></td>
<td>Alternative Education</td>
<td>2007</td>
</tr>
<tr>
<td></td>
<td>Human Resources</td>
<td>2009</td>
</tr>
<tr>
<td></td>
<td>Human Resources</td>
<td>2012</td>
</tr>
<tr>
<td>Minneapolis</td>
<td>Curriculum and Instruction</td>
<td>2004</td>
</tr>
<tr>
<td></td>
<td>Finance</td>
<td>2004</td>
</tr>
<tr>
<td></td>
<td>Federal Programs</td>
<td>2004</td>
</tr>
<tr>
<td>Newark</td>
<td>Curriculum and Instruction</td>
<td>2007</td>
</tr>
<tr>
<td></td>
<td>Food Service</td>
<td>2008</td>
</tr>
<tr>
<td>New Orleans</td>
<td>Personnel</td>
<td>2001</td>
</tr>
<tr>
<td></td>
<td>Transportation</td>
<td>2002</td>
</tr>
<tr>
<td></td>
<td>Information Technology</td>
<td>2003</td>
</tr>
<tr>
<td></td>
<td>Hurricane Damage Assessment</td>
<td>2005</td>
</tr>
<tr>
<td></td>
<td>Curriculum and Instruction</td>
<td>2006</td>
</tr>
<tr>
<td>New York City</td>
<td>Special Education</td>
<td>2008</td>
</tr>
<tr>
<td>Norfolk</td>
<td>Testing and Assessment</td>
<td>2003</td>
</tr>
<tr>
<td></td>
<td>Curriculum and Instruction</td>
<td>2012</td>
</tr>
<tr>
<td>Orange County</td>
<td>Information Technology</td>
<td>2010</td>
</tr>
<tr>
<td>Philadelphia</td>
<td>Curriculum and Instruction</td>
<td>2003</td>
</tr>
<tr>
<td></td>
<td>Federal Programs</td>
<td>2003</td>
</tr>
<tr>
<td></td>
<td>Food Service</td>
<td>2003</td>
</tr>
<tr>
<td></td>
<td>Facilities</td>
<td>2003</td>
</tr>
<tr>
<td></td>
<td>Transportation</td>
<td>2003</td>
</tr>
<tr>
<td></td>
<td>Human Resources</td>
<td>2004</td>
</tr>
<tr>
<td></td>
<td>Budget</td>
<td>2008</td>
</tr>
<tr>
<td></td>
<td>Human Resource</td>
<td>2009</td>
</tr>
<tr>
<td></td>
<td>Special Education</td>
<td>2009</td>
</tr>
<tr>
<td>Pittsburgh</td>
<td>Curriculum and Instruction</td>
<td>2005</td>
</tr>
<tr>
<td></td>
<td>Technology</td>
<td>2006</td>
</tr>
<tr>
<td></td>
<td>Finance</td>
<td>2006</td>
</tr>
<tr>
<td></td>
<td>Special Education</td>
<td>2009</td>
</tr>
<tr>
<td>Portland</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organization</td>
<td>Function</td>
<td>Year</td>
</tr>
<tr>
<td>--------------</td>
<td>---------------------------------</td>
<td>--------</td>
</tr>
<tr>
<td>Prince George’s County</td>
<td>Transportation</td>
<td>2012</td>
</tr>
<tr>
<td>Providence</td>
<td>Business Operations</td>
<td>2001</td>
</tr>
<tr>
<td></td>
<td>MIS and Technology</td>
<td>2001</td>
</tr>
<tr>
<td>Richmond</td>
<td>Personnel</td>
<td>2001</td>
</tr>
<tr>
<td></td>
<td>Human Resources</td>
<td>2007</td>
</tr>
<tr>
<td></td>
<td>Special Education</td>
<td>2011</td>
</tr>
<tr>
<td></td>
<td>Bilingual Education</td>
<td>2011</td>
</tr>
<tr>
<td>Rochester</td>
<td>Transportation</td>
<td>2003</td>
</tr>
<tr>
<td></td>
<td>Curriculum and Instruction</td>
<td>2003</td>
</tr>
<tr>
<td></td>
<td>Federal Programs</td>
<td>2003</td>
</tr>
<tr>
<td>San Diego</td>
<td>Special Education</td>
<td>2003</td>
</tr>
<tr>
<td>San Francisco</td>
<td>Finance</td>
<td>2006</td>
</tr>
<tr>
<td></td>
<td>Food Service</td>
<td>2006</td>
</tr>
<tr>
<td></td>
<td>Transportation</td>
<td>2007</td>
</tr>
<tr>
<td></td>
<td>Procurement</td>
<td>2007</td>
</tr>
<tr>
<td>St. Louis</td>
<td>Technology</td>
<td>2001</td>
</tr>
<tr>
<td></td>
<td>Special Education</td>
<td>2003</td>
</tr>
<tr>
<td></td>
<td>Curriculum and Instruction</td>
<td>2004</td>
</tr>
<tr>
<td></td>
<td>Federal Programs</td>
<td>2004</td>
</tr>
<tr>
<td></td>
<td>Textbook Procurement</td>
<td>2004</td>
</tr>
<tr>
<td></td>
<td>Human Resources</td>
<td>2005</td>
</tr>
<tr>
<td>St. Paul</td>
<td>Special Education</td>
<td>2011</td>
</tr>
<tr>
<td>Seattle</td>
<td>Human Resources</td>
<td>2008</td>
</tr>
<tr>
<td></td>
<td>Budget and Finance</td>
<td>2008</td>
</tr>
<tr>
<td></td>
<td>Information Technology</td>
<td>2008</td>
</tr>
<tr>
<td></td>
<td>Bilingual Education</td>
<td>2008</td>
</tr>
<tr>
<td>Category</td>
<td>Year</td>
<td></td>
</tr>
<tr>
<td>--------------------------------</td>
<td>------</td>
<td></td>
</tr>
<tr>
<td>Transportation</td>
<td>2008</td>
<td></td>
</tr>
<tr>
<td>Capital Projects</td>
<td>2008</td>
<td></td>
</tr>
<tr>
<td>Maintenance and Operations</td>
<td>2008</td>
<td></td>
</tr>
<tr>
<td>Procurement</td>
<td>2008</td>
<td></td>
</tr>
<tr>
<td>Food Services</td>
<td>2008</td>
<td></td>
</tr>
<tr>
<td>Toledo</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Curriculum and Instruction</td>
<td>2005</td>
<td></td>
</tr>
<tr>
<td>Washington, D.C.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finance and Procurement</td>
<td>1998</td>
<td></td>
</tr>
<tr>
<td>Personnel</td>
<td>1998</td>
<td></td>
</tr>
<tr>
<td>Communications</td>
<td>1998</td>
<td></td>
</tr>
<tr>
<td>Toledo</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transportation</td>
<td>1998</td>
<td></td>
</tr>
<tr>
<td>Facilities Management</td>
<td>1998</td>
<td></td>
</tr>
<tr>
<td>Special Education</td>
<td>1998</td>
<td></td>
</tr>
<tr>
<td>Legal and General Counsel</td>
<td>1998</td>
<td></td>
</tr>
<tr>
<td>MIS and Technology</td>
<td>1998</td>
<td></td>
</tr>
<tr>
<td>Curriculum and Instruction</td>
<td>2003</td>
<td></td>
</tr>
<tr>
<td>Budget and Finance</td>
<td>2005</td>
<td></td>
</tr>
<tr>
<td>Transportation</td>
<td>2005</td>
<td></td>
</tr>
<tr>
<td>Curriculum and Instruction</td>
<td>2007</td>
<td></td>
</tr>
<tr>
<td>Wichita</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transportation</td>
<td>2009</td>
<td></td>
</tr>
<tr>
<td>Common Core Standards</td>
<td>2011</td>
<td></td>
</tr>
</tbody>
</table>