

# **Review of Human Resource Operations in the Charlotte-Mecklenburg Schools**



**Submitted to the  
Charlotte-Mecklenburg Schools**

**By the  
Council of the Great City Schools**



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## **ACKNOWLEDGEMENTS**

The Council of the Great City Schools thanks the many individuals who contributed to this review for the Charlotte-Mecklenburg Public Schools. Their efforts were vital to the Council's ability to present the school district with the best possible recommendations for this critical area of the district's operations.

First, the Council thanks the Superintendent of the Charlotte-Mecklenburg Schools, Peter Gorman, who requested that the Council convene a Strategic Support Team to review and evaluate the district's human resource operations. The request illustrates the superintendent's commitment to addressing the human-capital needs of the district and improving overall operations. We also thank Maurice Green, the district's Chief Operating Officer, who provided the required background information and facilitated the review process.

Second, the Council thanks the school district administrators who served on the Strategic Support Team. They included Ascencion Juarez, Chief Human Resources Officer for the Chicago Public Schools; Wendy Macy, Director of the Personnel Commission of the Los Angeles Unified School District; and Shae Goodman-Robinson, Executive Director for Human Resources for the Jackson Public Schools. The enthusiasm and generosity of these individuals, who contributed their time *pro bono*, serve as further examples of how the nation's urban public school leaders are working together to help each other improve.

Third, we thank The Broad Foundation for providing the necessary resources to cover the team's expenses during its trip to Charlotte. We are grateful.

Finally, we thank Dan Cochran, former Executive Director of Human Resources for the School Board of Broward County. He served as the project's principal investigator and drafted the report. Moreover, we thank Bob Carlson, the Council's Director of Management Services, who directed the overall project. Their work was excellent and critical to the project's success.

Michael Casserly  
Executive Director  
Council of the Great City Schools

## **I. EXECUTIVE SUMMARY**

In October 2006, Peter Gorman, the Superintendent of the Charlotte-Mecklenburg Schools, asked the Council of the Great City Schools to examine the district's human resources division and to provide the following--

- A high level review of the human resource division's organizational and administrative structure with recommendations for improvements.
- An assessment of the effectiveness of the human resource division's performance as an integral strategic partner in the achievement of the district's goals and objectives.
- An evaluation of the human resource division's operational practices and procedures for effectiveness, efficiency, and utility.
- An assessment of the human resource division's readiness and staff capacity to implement a new Enterprise Resource Planning (ERP) system.
- An evaluation of the human resource division's customer focus and services provided to schools and departments.
- A review of the human resource division's role in the recruitment, job satisfaction, and retention of a high quality workforce.

In response, the Council assembled a Strategic Support Team of senior managers with extensive experience in human resources administration and operations in other large urban school systems across the country. The team reviewed information provided by the district and interviewed district staff during a four-day site visit to Charlotte on October 15-18, 2006.

To do its work, the Council of the Great City Schools conducted two kinds of assessments of the district's Human Resources Division. The first involved the site visit to review documents and interview staff. The second involved a self-assessment where the Council asked the division to rate itself on a series of "best practices."

The following summarizes the recommendations that resulted from the first assessment--

- Develop and implement a multiyear strategic plan that focuses on customer needs, efficient resource utilization, and strategic results aligned with the district's mission, vision, and balanced scorecard objectives.

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- Coordinate the development and implementation of a districtwide functionally aligned training and development program to build employee capacity for the accomplishment of strategic goals.
- Conduct a systematic review and evaluation of the district's teacher recruitment program.
- Provide a multifaceted employee retention program to reduce employee turnover and attrition.
- Implement internal workflow-process initiatives aligned to those identified in the Hackett Report to insure smooth transition with the Lawson ERP implementation.
- Implement an Employee Self Service plan in conjunction with the Lawson ERP initiative that will allow employees to access and change personal information, enroll in benefits, verify employment, etc.--thus eliminating the need for HR staff to perform non-value added actions.
- Revise the district's employee evaluation processes.
- Reorganize the Employment and Licensure Units with cross-functional teams focused on customer service and efficiency of operations.
- Reorganize the Employee Relations Unit so that it is accountable for a cross-functional linkage between employee relations and training and development.
- Establish and cross-functionally staff a "one-stop" customer information and service center to provide same-day responses to all requests.
- Hold senior human resources leadership accountable for implementation of functional goals, targets, and results focused on customer service and maximum return on investment of both human and financial resources.
- Assess the full impact and implications of the Lawson ERP system related to major functions and realigned workflows.
- Implement an extensive district-supported lateral entry alternative teacher training and licensure program focused on dramatically increasing the number of qualified candidates for teacher employment.
- Develop a districtwide budget and student enrollment forecast model to support "serious" teacher recruitment beginning annually in January.
- Implement a districtwide leadership-training academy charged with identification, development, induction, and mentoring of principals, assistant principals and

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other district leaders. Require demonstrated performance in critical leadership areas prior to eligibility for promotion to higher positions.

- Implement a senior management level salary and compensation advisory committee reporting to the superintendent to insure that salaries are competitive with the external market and internally equitable between positions and departments.

The Strategic Support Team did not make specific recommendations related to the district's self-assessment, but did encourage the Human Resources Division to carefully examine the following areas--

- Planning, coordinating, providing, and evaluating staff and professional development programs in both non-instructional and instructional areas.
- Salary and competitive-benefits package adjustments in order to compete for highly qualified applicants and retain them after employment.
- The entire range of management practices of the HR Division.
- Evaluation and termination procedures to ensure students are not impacted by employees who fail to meet performance expectations or whose behavior is potentially harmful to students.
- Efficient and cost-effective systems for managing absenteeism and the use of substitute personnel.
- The efficient and readily accessible manner of maintaining personnel records.

The recommendations presented in this report are not meant to be exhaustive. They were designed, instead, to provide the district with a starting point for making improvements in division operations.

As a starting point, the Council and the Strategic Support Team working on this project recommend that the district adopt a new management philosophy and organizational structure that reengineers human resources and realigns its functions with the district's strategic objectives. Basically, this would move human resources away from a division that has increasingly been performing personnel functions, which are largely transactional in nature, provide limited "value-added" to the district, and fails to provide the strategic "human capital" that is essential to accomplishing the district's strategic objectives.

## **II. DISTRICT OVERVIEW**

The Charlotte-Mecklenburg School District (CMS) is the largest school system in the state of North Carolina and the 25<sup>th</sup> largest in the nation. Consolidated in 1960, the school system encompasses a wide geographic area of urban, suburban, and rural communities. The district employs more than 16,000 persons, who work in support of approximately 161 schools and over 132,000 pre-k through 12 students. The school system, whose annual operating budget exceeds \$1.05 billion, is governed by an elected board of education that has recently hired a new superintendent. The school system focuses on goals related to high academic achievement, effective educators, adequate resources and facilities, safe and orderly schools, freedom and flexibility with accountability, world class service, and strong parent and community connections.

The district has consistently been recognized as a leader in public education and is often seen on the leading edge of innovative instructional and academic programs. In 2005, CMS was recognized by the *Wall Street Journal* in an article, “How Charlotte Tops Big Cities in School Tests.” The system was also the subject of cutting-edge research by the Council of the Great City Schools on how urban school districts improve, and two of its leaders were presented with the Council’s Richard Green Award. The school system has also been recognized as the first large urban school district to receive the Southern Association of College and Schools “High Quality Accreditation.” The school system has consistently outperformed its peers on student test scores when compared to comparable school systems at both the state and national levels.

As is common among large urban school districts across the country, however, the district faces demanding challenges related to increased student enrollments, expanded student diversity, more complex educational requirements, and often conflicting interest group pressures with mounting and restrictive budget constraints.

Student enrollment has grown from about 20,000 in 1949 to more than 132,000 students grades pre-k through 12. In fact, the system has grown by more than 3-5,000 students a year over the past several years—far outstripping the rate of increases seen in other major school districts nationally. Over this same time period, minority student enrollment increased to about 63 percent of the total student body, which is now approximately 47.4 percent African-American, 13.6 percent Latino, 4.3 percent Asian, and 3.5 percent Indian. White student enrollment has declined to about 36 percent. About 45.5 percent of enrolled students are eligible for a free or reduced price lunch and approximately 11,000 students require English-as-a-second-language support.

Even though student achievement is generally comparable to or above state and national averages, the district is under constant pressure to improve performance. Community activist groups demand more services, while the business community expects stronger return on investment. Parents and students expect more and better services for an increasing variety of student needs and special requirements.

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The district has been generally successful in recruiting a high-quality teacher workforce but continuing high turnover rates reduce institutional knowledge and require additional resources to meet on-going recruitment and retention demands. Communications between various divisions of the central office and the schools are often seen as either inadequate or conflicted, leaving individual school administrators to function in their own best interests. Operational procedures, though thoroughly mapped in the Hackett Report, are outdated and will require extensive realignment in terms of workflow and staff training if implementation of the Lawson Enterprise Resource Planning system is to be successful.

Not only are student enrollments increasing but also the increasingly diverse student body requires increasing types and quantities of services. Demands for higher student achievement and increased accountability along with a variety of state and federal mandates, moreover, have made it difficult for the district to maintain its standards of service. Thus, mounting challenges have stretched both financial and human resources to their limits, even though budget dollars and numbers of employees have increased.

Despite these challenges, the district continues to advance student achievement and make substantial progress in attaining its goals. The workforce is highly skilled and motivated to support schools and students. The business community, college and university leaders, community activists, parents, and other stakeholders remain solidly in support of the school system and its leadership. The district is currently embarked on a number of high-risk enterprises and strategies designed to address its challenges and to position itself to maintain and enhance its reputation as one of the nation's most outstanding urban school systems.



### **III. PROJECT OVERVIEW**

The Council of the Great City Schools (“the Council”) has conducted approximately 140 instructional, management, and operational reviews in 37 big city school districts over the last eight years. The organization conducts these reviews using Strategic Support Teams of current and former senior managers with strong reputations for effective operations and innovative practices in major urban public school systems across the country. (Appendix E lists the reviews conducted by the Council.)

#### **A. Project Goals**

In October 2006, Peter Gorman, the new Superintendent of the Charlotte-Mecklenburg Schools, asked the Council of the Great City Schools to examine the district’s human resource division and to provide the following--

- A high level review of the human resource division’s organizational and administrative structure with recommendations for improvements.
- An assessment of the effectiveness of the human resource division’s performance as an integral strategic partner in the achievement of the district’s goals and objectives.
- An evaluation of the human resource division’s operational practices and procedures for effectiveness, efficiency, and utility.
- An assessment of the human resource division’s readiness and staff capacity to implement a new Enterprise Resource Planning (ERP) system.
- An evaluation of the human resource division’s customer focus and services provided to schools and departments.
- A review of the human resource division’s role in the recruitment, job satisfaction, and retention of a high quality workforce.

#### **B. Strategic Support Teams**

In response, the Council assembled a Strategic Support Team of senior managers with extensive experience in human resources administration and operations in other large urban school systems. The team was composed of the following members (See Appendix C for biographies of Strategic Support Team members)--

- **Strategic Support Team**

Dan Cochran  
Executive Director, Human Resources (Retired)  
Broward County School District

Ascencion Juarez  
Chief Human Resources Officer  
Chicago Public Schools

Wendy Macy  
Director, Personnel Commission  
Los Angeles Unified School District

Shae Goodman-Robinson  
Executive Director, Human resources  
Jackson Public Schools

- **Council Staff**

Robert Carlson  
Director of Management Services  
Council of the Great City Schools

### **C. Project Activities**

To meet project objectives, the Strategic Support Team conducted the following activities during and after its four-day site visit to Charlotte on October 15-18, 2006. (The working agenda for the site visit is shown in Appendix A.)

- Reviewed relevant information and documentation provided by district staff. (A list of documents reviewed by the team is presented in Appendix B.)
- Interviewed key district and human resources division staff members as well as other relevant stakeholders, such as school principals. (A list of people interviewed by the team is presented in Appendix C.)<sup>1</sup>
- Conducted additional analyses related to issues identified during the interview process.

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<sup>1</sup> The Council's review was based on interviews with staff and others, a review of documents provided by the district, observations of operations, and the team's professional judgment. The team conducting the interviews rely on the willingness of those interviewed to be truthful and forthcoming, and make every effort to provide an objective assessment of district functions but cannot always judge the accuracy of statements made by all interviewees.

- Assessed critical issues relevant to potential improvement opportunities in the district's human resource practices.
- Developed a series of recommendations to assist the district in its efforts to improve the effectiveness and efficiency of its human resource program.
- Synthesized and refined the team's findings and recommendations and briefed the Chief Operating Officer.

The Council sent draft copies of this report to team members for review to ensure accuracy and obtain their concurrence with recommendations. The final report was then forwarded to superintendent for consideration.

### **D. Project Benefits**

The reports generated by the Council of the Great City Schools and its Strategic Support Teams are occasionally critical. As such, they serve as the basis for improving operations, organization, instruction, and management of many urban school systems nationally. In other cases, the reports are complimentary and serve as the foundation for identifying innovative practices. This peer review approach has a number of benefits over reviews conducted by other groups.

- **Credibility.** The teams are highly credible because they are made up of subject matter experts, who understand the issues and challenges that urban school districts experience and know how to provide realistic recommendations that can be implemented in the real world.
- **Collegiality.** By working with current and former school administrators, the school district's staff members expand the list of colleagues with whom they can share ideas. This collegiality promotes the sharing of efficiencies, as administrators benefit from lessons learned in other large urban school districts across the country.
- **Cost-Efficiency.** Since the teams have first-hand knowledge of school district administration and operations, they are able to identify issues and concerns quickly, knowing where and how to probe. This efficiency reduces the "learning curve" for team members and enables the Council to offer high-quality services at reduced costs.

## **IV. FINDINGS AND RECOMMENDATIONS**

To do its work, the Council of the Great City Schools conducted two kinds of assessments of the district’s Human Resources Division. The first involved a site visit by a Strategic Support Team that reviewed documents and interviewed staff. The second involved a self-assessment where the Council asked the division to rate itself on a series of “best practices.” The Council and the Strategic Team strongly recommend that the district carefully review the findings and reconcile the differences that surface from both the site visit and the self-assessment.

### **A. Site Visit**

#### **1. Findings**

The following findings were based on the Strategic Support Team’s site visit to the district and are divided into three major categories—

- Organization and Resource Management
- Leadership and Decision Making
- Management and Operations

#### **Organization and Resource Management**

##### **District Organization<sup>2</sup>**

Although not part of its immediate charge, the team noted several issues during the interview process related to the district’s overall administrative structure (See Exhibit 1 below). Issues of concern to the team included the following—

- The existing organizational structure of the district may not meet the strategic alignment requirements of the school system’s strategic vision, mission, goals, and objectives.
- Existing line authority for major instructional and operational functions in the organization may diminish or undermine ownership and accountability for results.

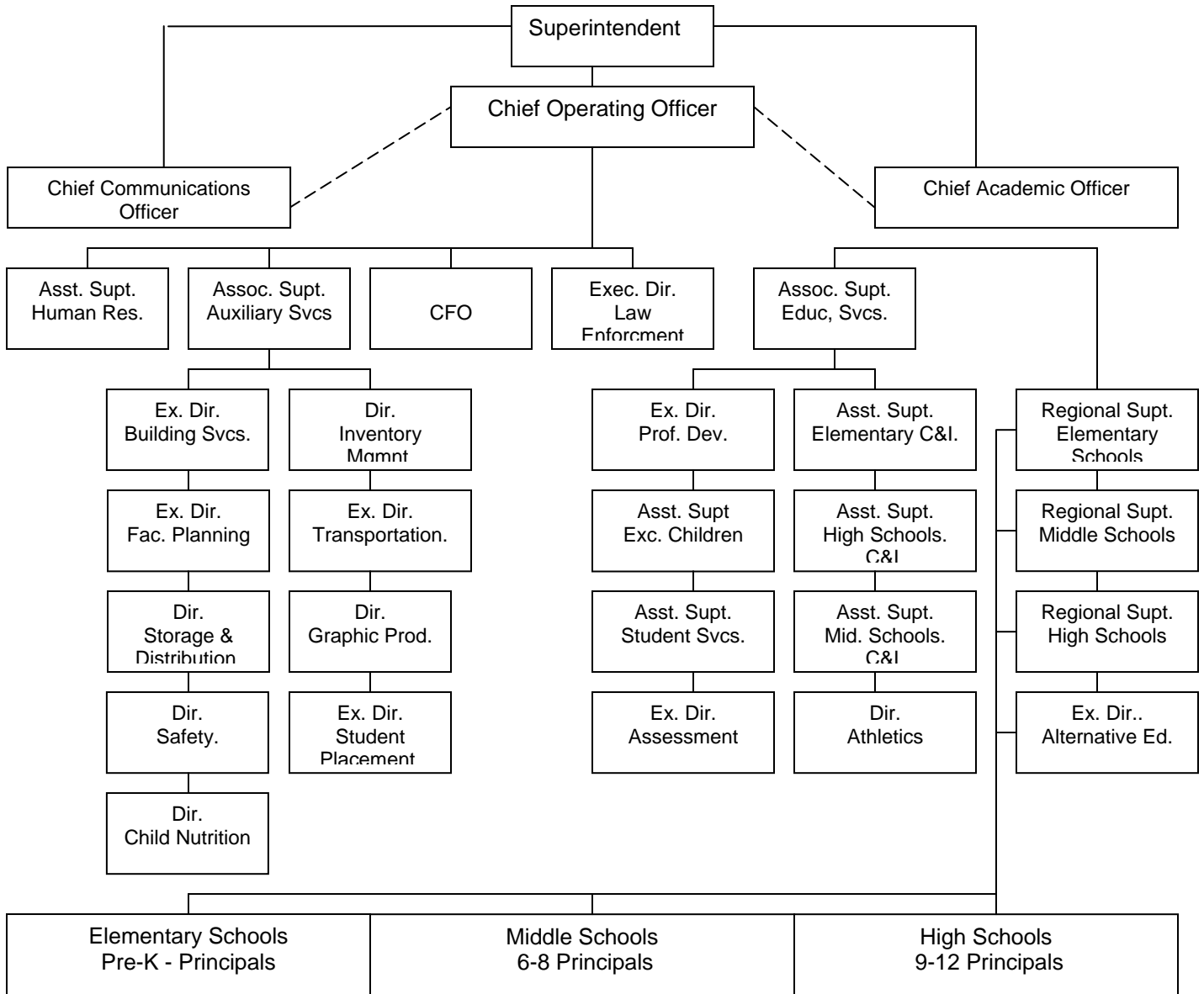
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<sup>2</sup> The team appreciates that organizational structures are the prerogatives and personal preferences of all Chief Executive Officers, including the Superintendent of the Charlotte-Mecklenburg Schools. The team raises issues about organizational structure here to suggest that the superintendent, who is relatively new to the district, consider flattening his organizational structure with five direct reports (business operations, finance, personnel, instruction, and technology) to ensure that all critical administrative decisions are aligned with the district’s strategic direction and his high-risk projects. The current more streamlined organizational structure could be restored when he is confident that the strategic alignment has been accomplished and the high-risk projects are well on the way to full implementation.

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- Senior management may not be correctly positioned in the organizational structure to support interdependent and sometimes conflicting high-risk projects in the district, such as decentralization and ERP implementation.

**Exhibit 1 – Current District Organization**



- Timeliness and accuracy of information flow may be diminished in the district because of multiple levels of hierarchy.
- A three-tiered administrative reporting structure may not provide sufficient data for informed decisions at the superintendent’s level.

- A formal reporting structure designed to provide the superintendent with consistent up-to-the-minute data is lacking.

### **Resource Management Organization**

- Political as well as financial and human capital requirements of the district may not be adequately “flushed out” within the current structure.
- The annual budget and student enrollment forecasting process does not adequately provide for teacher employment dynamics and timing.
- High-level teacher recruitment concerns, such as overly restrictive and complex licensure issues, are not successfully leveraged at the state level even though two state board of education members live in the district.
- Lateral-entry teacher recruitment is not focused at a high-enough level to meet the increasing employment requirements of the district.
- State college and university programs continue to fall far short of teacher recruitment needs without high-level district corrective action.
- There is a lack of customer service focus at all levels of the organization.
- The district does not have a high-level program to address its high employee attrition rate.
- Accountability for employee performance at the highest levels is not monitored adequately for appropriate consequences or rewards.
- The position control linkage between the staffing of vacancies by the human resource unit and the allocation of positions by the budget office is not well defined.

### **Leadership and Decision Making**

- Classified vacancies in major employment areas of transportation, custodial, building maintenance, and food services are not filled on a timely basis.
- Compensation is not competitive with comparable jobs in the region and a philosophy requiring low-entry salaries, regardless of experience, makes recruitment difficult.
- Compensation inequity has resulted in principals being hired from the outside at higher salaries than comparable principals or supervisors of principals who have extensive experience within the district.

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- Teaching staff receive annual longevity increases while classified employees receive only across the board raises based on state increases.
- Recruitment of teachers is adversely affected by staffing formulas not provided until March.
- Ownership and accountability for the retention of teachers and other employee groups is not adequate, and training of principals on retention strategies is insufficient and focused on “warm fuzzies.”
- Allowing up to four types of personnel files on employees may unduly expose the district to violations of privacy laws and lawsuits by employees.
- Human resource leaders have not clearly communicated or trained principals and other school-based personnel on basic and mandated district requirements that could help them better understand what HR does and why it does it.
- Workplace satisfaction initiatives, including training of principals to reduce teacher turnover, is inadequate.
- There is no alignment between employee concerns identified by the employee relations unit and training programs designed to mitigate them.
- Employment of additional personnel to meet the increasing volume of work needs of the district due to continued growth has been inadequate.
- Teacher recruitment activities have not been reviewed for results or updated to reflect changing market conditions and challenges.
- Regional superintendents lack sufficient involvement in the teacher recruitment process to support principals in high-need schools.
- Principal and assistant principal training and induction programs lack sufficient “real world” application, and some candidates have been promoted without having completed all requirements.
- The Lawson ERP implementation project, which is now behind schedule, may experience additional delays and financial overruns due to systems testing, customizations, workflow process revisions, and user training.

### **Management and Operations**

- Internal workflow processes are highly “paper” dependent and have not been systematically revised to meet the demands of increasing volume and changing operational environments.

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- The process of hiring teachers for both the current and next school years at the same time causes workflow delays.
- Background and reference checks are inefficient and take too much time.
- The lag time between employment fairs and actual job assignments can be up to three months and result in candidates taking jobs with other districts.
- Employment and licensure specialists are not cross-trained to assist each other, a situation that reduces employment processing efficiency.
- The district's training and development functions lack coordination and strategic alignment.
- Employee-benefits enrollment and administration is highly inefficient and lacks a focus on customer satisfaction.
- Training for classified employee groups is fractured and appears to lack much of an overall districtwide focus.
- Lateral-entry training for human resource induction and instruction mentoring programs lack coordination and alignment.
- Training and development programs do not have accountability and satisfaction measures of effectiveness.
- Personnel-records management is very paper intensive and poorly managed.
- Notice of teacher vacancies, the teacher reassignment process, and teacher-transfer processes lack coordination and alignment.
- Exit interviews are conducted with no organized program in place to address issues identified as causing employee dissatisfaction.
- Responsibility for the application and maintenance of teacher licensure has been assumed by the district.
- Successful completion of mandatory principal and assistant principal training and development programs are not consistently required for promotion, a situation that may contribute to some staff not being successful after being promoted.
- The process for developing the candidate pool to fill principal positions and the process for selection is not well articulated throughout the district.



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- Principals reported that two to three weeks often pass before they receive a list of qualified teacher candidates to fill announced vacancies.
- Frequent turnover of employment analysts results in processing delays and constant training of new analysts.
- Teacher candidate and new-hire communications and information systems often fail to advise job seekers clearly and/or those who have accepted a job offer.

### **2. Recommendations**

The Council recommends a number of strategies to improve the organization, management, and operations of the Human Resource Division of the Charlotte-Mecklenburg schools.

- Develop and implement a multiyear strategic plan focusing on customer needs, efficient resource utilization, and strategic results aligned with the district's mission, vision, and balanced scorecard objectives.
- Develop and implement a districtwide and functionally aligned training and development program to build employee capacity to accomplish strategic goals.
- Implement a systematic review and evaluation of the district's teacher recruitment program to insure that—
  - An annual marketing and recruiting plan is implemented to meet the needs of the district and is aligned with changing market demands.
  - Annual goals and results are used to guide recruitment activities.
  - All recruiters are trained and held accountable for results.
  - Communications between applicants, principals, and human resources professionals are timely, accurate, and sufficient to keep candidates from seeking employment elsewhere.
  - Regional superintendents, instructional directors, and principals are actively engaged in timely recruitment efforts.
  - Both financial and human resources are utilized efficiently for maximum return on investment.
- Provide a multifaceted employee retention program to reduce employee turnover and attrition that includes—

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- Workplace satisfaction initiatives at all schools and offices.
- Retention training for all administrators and supervisors.
- Incentives and rewards aimed at the intrinsic value of employees.
- Induction orientation and mentoring of new employees.
- Personal growth and effectiveness of veteran employees.
- Implement internal workflow-process initiatives aligned with those in the Hackett Report to insure smooth transition with the Lawson ERP implementation, including the following—
  - Review and revise current HR practices and procedures with customer service focus.
  - Realign and cross-train HR staff for maximum utilization and efficiency of operations.
- Implement an Employee Self-Service plan in conjunction with the Lawson ERP initiative that will allow employees to access and change personal information, enroll in benefits, verify employment, etc.—thus eliminating the need for HR staff to perform so many non-value added actions.
- Revise the district’s employee evaluation processes to insure—
  - Alignment with the district’s strategic mission, vision, and balanced scorecard objectives.
  - Ownership and accountability for operations and performance results.
  - Clearly defined expectations for customer service.
  - Performance standards that are aligned with major functional assignments.
  - Consequences for the failure to perform according to expectations.
  - Intrinsic rewards and recognitions for exceptional performance.
- Reorganize the Employment and Licensure Unit into cross-functional teams focused on customer service and efficiency of operations, including the following actions—
  - Change the Unit’s name to Recruitment, Employment, and Induction Services.

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- Reorganize the three director's roles as heads of the cross-functional teams, insuring functional alignment and integration of recruitment personnel, employment analysts and licensure specialists, and induction processing.
- Organize cross-functional work teams to support both instructional and non-instructional services in schools and departments.
- Reorganize the Employee Relations Unit to be accountable for cross-functional linkages between employee relations and district training and development, including the following actions—
  - Change the Unit's name to Employee Relations and Development.
  - Expand the new-hire orientation to include a focus on building district loyalty and commitment.
  - Establish a linkage between employee relations issues and district training programs to mitigation workplace dissatisfaction.
  - Implement a districtwide linkage between all training and development efforts to focus on strategic goals and objectives.
  - Coordinate the instructional and other divisions with the HR unit to insure that staff capacity and program expertise are maximized across the district.
- Establish and staff with cross-function personnel a “one-stop” customer information and service center to provide same-day responses to all requests.
- Hold senior human resource leadership accountable for implementing functional goals, targets, and results focused on customer service and maximum return on investment of both human and financial resources.
- Assess the full impact of the Lawson ERP system on major functions and on the alignment of workflows, including—
  - User-training requirements for all managers and staff.
  - Security-clearance levels and needs for all HR staff.
  - Customer-focused, user-friendly application and recruitment processes.
  - Efficiency of “hand-offs” between functions and operating units.

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- Implement an extensive district-supported, lateral-entry alternative teacher training and licensure program focused on increasing the number of qualified candidates for teacher employment, including—
  - Enhanced partnerships with area colleges and universities.
  - Community-supported “grow-our-own” induction efforts.
  - Recruitment of teacher assistants and comparable groups who know schools.
  - One-stop information and service for all potential candidates.
  - Summer internships and financial-support work programs.
  - Trained mentors and administrators to support and assist new teachers.
- Develop a districtwide budget and student enrollment forecast model to support “serious” teacher recruitment beginning annually in January, including—
  - School attendance zones and new school enrollments.
  - School budget and allotment estimates provided to principals.
  - Teacher transfers and reassignments conducted electronically directly between principals and teachers, with new teachers being hired during the same period.
  - Principals held accountable for hiring teachers according to trend data and forecast estimates rather than waiting until final budget approval when teacher supply and quality is significantly diminished.
- Implement a districtwide leadership-training academy charged with identifying, developing, inducting and mentoring principals, assistant principals, and other district leaders. Require demonstrated performance in all identified critical leadership areas prior to eligibility for promotion to higher positions.
- Implement a senior management level salary and compensation advisory committee reporting to the superintendent to insure that salaries are competitive with the external market and internally equitable between positions and departments, including—
  - Use of an approved point factor-analysis process to determine the appropriate salary level of jobs within the district.

- An annual external compensation study comparing salaries in other school districts (with a primary emphasis on teacher salaries) and similar government or private sector jobs.
- Use of a spreadsheet matrix to compare and contrast all salaries across departments and jobs in order to maintain internal equity and comparability.
- Implementation of salary and compensation guidelines and rules to insure fairness and consistency.

### **B. Self Assessment**

The second method used by the Council to assess the district’s Human Resources Division involved the use of an instrument that enabled the division to rate itself on a series of “best practices.” The assessment was adapted with permission from one developed by the Florida Office of Program Policy Analysis and Government Accountability (OPPAGA) and Florida’s Auditor General, and was endorsed by the Council’s Chief Human Resources Officers at their 2004 annual meeting as a model instrument to assess school system operations.

The instrument, which can be used as either a self assessment or an external one, was developed to help districts 1) use performance and cost-efficient measures to evaluate programs; 2) use appropriate benchmarks based on comparable school districts, government agencies, and industry standards; 3) identify potential cost-savings; and 4) focus budget and resources on district priorities and goals, including student performance. The surveys are grounded in a set of “best practices and indicators” that were identified from extensive literature reviews, interviews of education personnel experts, representatives from professional organizations, and educators in other states. The survey measures 17 standards and 161 indicators in five functional HR areas—

- Staff Development (3 Standards and 39 Practices)
- Recruitment, Hiring and Retention (2 Standards and 33 Practices)
- Human Resources Management (8 Standards and 52 Practices)
- Personnel Evaluation (2 Standards and 24 Practices)
- Absenteeism and Personnel Records Management (2 Standards and 13 Practices)

### **1. Findings**

In sum, the Charlotte-Mecklenburg Public Schools’ (CMPS) Human Resources Division’s self-assessment using the OPPAGA survey indicates that the H.R. Division uses 107 (66.5 percent) of the 161 indicators of “best human resources management practices.”

### Staff Development Practices

The CMS Human Resources Division reported that it uses 82.1 percent of the 39 indicators of best practices in staff development in three standards areas.

- **Standard 1:** The district’s HR Division provides a comprehensive staff development program to achieve and maintain high levels of productivity and employee performance among *non-instructional* employees.
  - The HR Division uses seven (63.6 percent) of the 11 indicators of best practices, including<sup>3</sup>—
    - The HR Division conducts orientation programs for all new employees.
    - The HR Division’s orientation programs include information on district procedures, performance expectations and evaluations, training and career opportunities, and personnel policies regarding such issues as absences, leave approval and tardiness.
    - The HR Division has a districtwide training program and maintains training records on each staff member.
    - The HR Division plans training programs based on districtwide needs assessments that include input from employees and their supervisors.
    - The HR Division has procedures to evaluate individual in-service training activities.
    - The HR Division uses employee feedback to evaluate individual in-service training activities.
    - The procedures to evaluate individual in-service training activities included the extent to which the efforts meet identified long-term training objectives.
  - **The HR Division makes limited or partial use of the following best practices--**
    - The HR Division solicits and uses input from supervisors and employees hired within the last three years to establish, revise, or affirm its new employee orientation programs for non-instructional employees, including content and approach.
    - The district establishes and implements formal staff development plans to provide on-going training of non-instructional employees.
  - **The HR Division does not use the following best practices--**

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<sup>3</sup> The Council’s Strategic Support Team did not see or hear evidence that the Human Resources Department was involved in the staff development program for non-instructional employees as inferred by the division’s responses to the survey.

- The HR Division has mentoring programs, as appropriate, for new non-instructional employees.
  - The responsibility for training classes of non-instructional employees may be delegated to another unit within the district (i.e., transportation employees may be trained by the district's transportation unit), but that unit provides the district training officer with copies of annual plans, training schedules, and attendance rosters.
- **Standard 2:** The district's HR Division provides a comprehensive staff development program for *instructional* employees to attain and maintain high quality instruction and to achieve high levels of student performance.
    - The HR Division uses 21 (91.3 percent) of the 23 indicators of best practices in this area, including<sup>4</sup>--
      - The HR Division conducts orientation programs for all new instructional employees, including information on district procedures, performance expectations and evaluations, training and career opportunities, and personnel policies regarding such issues as absences, leave approval and tardiness.
      - The HR Division maintains training records on each staff member.
      - The HR Division solicits and uses input from supervisors and from new employees within the last three years to establish, revise, or affirm its orientation and induction programs for new instructional employees, including content and approach.
      - The HR Division has a comprehensive induction program that provides new teachers with the opportunities to learn the additional skills necessary to be successful in specific school environments.
      - The HR Division's induction program includes a mentoring component for new teachers.
      - The HR Division assigns mentors to each new teacher to provide guidance and advice as the new employee learns the various aspects of the job.
      - The HR Division trains mentors in the purposes of mentoring and in mentoring techniques and practices.
      - The HR Division plans training programs for instructional employees based on districtwide needs assessments that include input from employees and their supervisors.
      - The HR Division uses analyses of disaggregated student data pertaining to goals for student learning and development to plan training programs.

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<sup>4</sup> The high percentage of self-reported use of these staff development practices should be understood within the context that while these activities occur, the primary responsibility for them is assigned to the Professional Development Division that reports to the Curriculum and Instruction Department, and not to the Human Resources Department.

- The HR Division establishes, implements, and publishes an annual staff development plan for its instructional employees.
  - The HR Division’s staff development plan includes clearly identified objectives for training.
  - The objectives for the HR Division’s staff-development training objectives include improved student performance.
  - The HR Division uses training funds in a cost-effective manner to enable instructional employees to further their professional development in a way that benefits the district and/or improves student outcomes.
  - The HR Division has procedures to evaluate individual in-service training activities.
  - The HR Division evaluates the impact of in-service training activities on student outcomes and employee feedback.
  - The HR Division evaluates the extent to which annual training efforts meet identified long-term training objectives.
  - The HR Division’s training programs for instructional staff includes research-based teaching strategies that increase student learning and development.
  - The HR Division’s training programs for instructional staff includes strategies for assessing student performance.
  - The HR Division’s training programs for instructional staff includes follow-up necessary to ensure improvement.
  - The HR Division’s training programs for instructional staff includes a variety of training approaches (e.g., lecture, simulation of techniques, observation, classroom practice, and feedback).
  - The HR Division has developed policies to encourage instructional personnel to pursue certification by the National Board of Professional Teaching Standards.
- **The HR Division does not use the following best practices—**
    - The HR Division has a professional development system that meets the requirements of State law, including approval by the state Department of Education.
    - The HR Division uses analyses of the aggregated results of employee evaluations to plan training programs.
- **Standard 3:** The district’s HR Division provides a comprehensive staff development program for school-based administrators.
    - The HR Division reported that it uses four (80 percent) of the five indicators of best practices, including--
      - All principals, assistant principals, and school site administrators have completed (or anticipate completing within the current school year) the



HR Division's leadership training program for administrators and school-based managers.<sup>5</sup>

- The HR Division provides training to new administrators prior to their appointment to an administrative position.<sup>6</sup>
- The HR Division's training program for new school administrators includes a mentoring component.<sup>7</sup>
- The HR Division's decisions regarding the retention of school administrators in administrative positions are made after considering feedback solicited and received from non-administrative personnel and from parents.<sup>8</sup>

○ **The HR Division reported limited use of the following best practice--**

- The HR Division has a process for identifying employees with the potential for employment in administrative positions.

### **Recruitment, Hiring, Salary & Benefits Practices**

The CMS Human Resources Division reported that it uses 24 (72.7 percent) of the 33 indicators of best practice in recruitment, hiring, salary, and benefits in three areas.

- **Standard 1:** The district's HR Division has efficient and effective processes for recruiting and hiring qualified personnel.
  - The HR Division uses 15 (78.9 percent) of the 19 indicators of best practices in this area, including--
    - The HR Division has standard districtwide procedures to announce vacancies and to receive and process applications.
    - The HR Division conducts its employment procedures in a manner that assures equal opportunity regardless of age, race, color, religion, sex, and national origin.
    - The HR Division completes background checks on all new employees prior to placing the employee in a position that involves contact with students.
    - The HR Division maintains up-to-date, clear, concise, and readily accessible position descriptions that accurately identify the duties of

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<sup>5</sup> The Human Resources Department reported compliance with this practice as part of an extensive program compiled through Leadership Academy and Professional Development, with HR consultation and participation.

<sup>6</sup> The Human Resources Department reported compliance with this practice as part of the district's Emerging Leaders program.

<sup>7</sup> The Human Resources Department reported compliance with this practice as part of the Principal Mentor and Retired Principal Coach program offered by Professional Development.

<sup>8</sup> The Human Resources Department uses surveys to solicit feedback from non-administrative personnel and parents when decisions are made regarding the retention of school administrators.

each position and the education, experience, knowledge, skills, and competency levels required for each class of positions, and for each district-level administrative position.

- The HR Division can demonstrate that its recruiting practices generate a sufficient number of qualified applicants to fill vacant positions in a timely manner.<sup>9</sup>
- The HR Division can demonstrate that its recruiting strategies are cost-effective.
- The HR Division’s job vacancy announcements provide information on positions to be filled, education, experience, knowledge, skills, and abilities required, and compensation range.
  - Vacancy information is accessible through both a telephone job-line and through the Internet.
  - The job application procedures are applicant-friendly.
  - Application forms are easily accessible.
  - Applications are easily shared within the district so that the applicant is not required to take a separate copy of their application to every different school to which they apply.
  - The HR Division has a procedure for matching applicants with available openings.
- If certain races or ethnicities are underrepresented, the HR Division has implemented a long-term plan to remedy that situation.<sup>10</sup>
- The HR Division can demonstrate that it verifies the qualifications of all of its instructional employees, and that all instructional employees are qualified for the positions that they hold.
- The HR Division has procedures to monitor the number of out-of-field teachers who have been hired, and the status of those teachers’ efforts to attain certification in the field in which they are teaching.
- **The HR Division reported partial or limited use of the following practices—**
  - In those areas in which the district has experienced a shortage of qualified applicants, the HR Division has developed and implemented short- and long-term strategies to remedy the situation.
  - The HR Division periodically compares its entry-level salaries with neighboring districts, and adjusts entry-level salaries as necessary to compete for qualified applicants.<sup>11</sup>

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<sup>9</sup> The Human Resources Department reported that mathematics and early children education are areas where it can demonstrate that its recruiting practices generate a sufficient number of candidates.

<sup>10</sup> The district reported that it complies with this indicator of best practice through its recruitment locations and direction it gives to referrals.

<sup>11</sup> The district reported that it conducts surveys; that its funding is limited for large group changes; that a Request for Proposal (RFP) for a salary study has been approved and under development; that the pay

## **Review of Human Resource Operations in the Charlotte-Mecklenburg Schools**

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- The HR Division can demonstrate that the employees hired within recent years generally reflect the population of the district.<sup>12</sup>
- **The HR Division does not use the following best practice—**
  - Applicants can readily ascertain the status of their application.
- **Standard 2:** The district’s HR Division maintains a reasonably stable work force through competitive salary and benefit packages and through district-wide efforts to address and remedy factors that contribute to increased turnover.
  - The HR Division uses nine (64.3 percent) of the 14 indicators of best practices in this area, including--
    - The district has developed a policy and/or procedures that give a preference based on instructional performance when selecting instructional personnel for positions that receive supplemental pay (i.e., team leaders, mentors, etc.).
    - The district has developed incentive policies to encourage and reward effective teachers, critical shortage teachers, and teachers in hard to place schools.
    - The HR Division conducts exit interviews with employees who terminate their employment.<sup>13</sup>
    - The HR Division periodically compiles and analyzes the results of its exit interviews.
    - The HR Division maintains data on turnover rates for major classes of employees, and monitors this data to identify unusual variations in the turnover rate.
    - The HR Division compiles the results of their exit interviews and the analyses of turnover rates are provided to the superintendent and to the board for their information and consideration at least annually.<sup>14</sup>
    - Unless the district’s turnover rates are lower than the rates in most of its peer districts, the HR Division can demonstrate attempts to identify and remedy factors that adversely affect the district’s ability to retain qualified instructional and non-instructional personnel.
    - The HR Division monitors data related to portions of the workforce approaching retirement, with attempts to forecast any large numbers of

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grades for secretaries changed in 2004-2005 and 2005-2006; and that there has been change in local teacher supplements.

<sup>12</sup> The district reported that certain schools are less diverse.

<sup>13</sup> The HR Division reported that it provides a survey in its exist packet and opportunities for interviews with employees who terminate their employment.

<sup>14</sup> The HR Division reported that it began reporting the results of its exit interviews and the analyses of turnover rates to the board for its information and consideration in 2006.

retirements that are likely to create a need for an abnormally high number of qualified applicants for any given year.

- In setting employee compensation and benefit packages, the district periodically compares its compensation and benefit package with that of neighboring and similar sized school districts, and of other public and private employers in the area.

○ **The HR Division makes partial use of the following practices—**

- The HR Division has implemented strategies to improve the retention of good employees, such as linking pay increases to performance.<sup>15</sup>
- The HR Division periodically compares its turnover rates with the turnover rates of peer districts.<sup>16</sup>
- The HR Division identifies factors that adversely affect the district's ability to retain qualified instructional and non-instructional personnel through climate surveys, exit interviews, the collective bargaining process, or district-wide personnel reviews.
- When criteria such as position, years of experience, education level, district cost of living, and job requirements are considered, the district's compensation and benefits package, including the contribution to the state retirement system, is competitive with the value and compensation of other public and private employers in the area.<sup>17</sup>
- The district periodically analyzes and compares major classes of positions within the district for internal equity, and adjusts salaries as appropriate based upon those reviews.<sup>18</sup>

### **Human Resources Management Practices**

The CMS Human Resources Division uses 24 (46.2 percent) of the 52 human resources management's best practices in eight standards areas.

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<sup>15</sup> The HR Division reported that principal pay is performance based; that four high schools go to performance salary supplements in 2007-2008; that other pay initiatives based on performance are bonuses; that evaluation forms were designed to allow performance-based increases; and that legislated annual salary increases from the state have language forcing across the board salary increases for most groups rather than flexible language to allow performance pay.

<sup>16</sup> The HR Division reported that the comparison of turnover rates is limited to teacher turnover.

<sup>17</sup> The HR Division reported that while the district's compensation and benefits package is competitive with the value and compensation of other public and private employers in the area, the compensation and benefits packages offered to non-licensed employees is not competitive with other public and private employers in the area.

<sup>18</sup> The HR Division reported that there is no clear funding source for large group changes. Secretaries at all grades were changed in 2004-2005 and in 2005-2006 and that teacher supplements are changed in some years.

## **Review of Human Resource Operations in the Charlotte-Mecklenburg Schools**

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- **Standard 1:** The district’s HR Division maintains clear and effective channels of communication with employees.
  - The HR Division uses five (62.5 percent) of the eight indicators of best practices in this area, including—
    - The HR Division produces and distributes a handbook to its employees, which includes information on such subjects as employee rights and responsibilities, fringe benefits, general working requirements (workdays, leave policies, holidays, etc.), personnel evaluation process, grievance procedures, and compensation policies; a copy of applicable collective bargaining agreement; and pamphlets or other written material explaining district benefit programs.<sup>19</sup>
    - The HR Division maintains an internet/intranet-based site that contains correct and current detailed information for employees, including district personnel policies, a district calendar, district office staffing information (who is responsible for what and how to contact), and other relevant district data and information.
    - The HR Division has established cost-effective means of directly informing employees of district news, policy and personnel changes, and other relevant information.
    - The HR Division officials schedule periodic visits to individual school and other work sites to meet with employees.
    - When developing or revising major policies, the HR Division solicits and uses input from interested and affected employees through surveys, task forces, work groups or other consensus-gathering approaches.
  - **The HR Division makes partial use of the following practices—**
    - The HR Division has established a system for soliciting feedback from its employees. The process for receiving and acting upon employee feedback is clearly articulated, and the district can demonstrate that it has regularly solicited feedback and responded to the feedback it has received.<sup>20</sup>
    - The HR Division has clearly articulated the responsibilities for each office at the district level in the employee handbook, in documents provided to parents, or school website so that district employees, parents, and the school board can determine the functions of those offices.<sup>21</sup>

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<sup>19</sup> The Strategic Team did not have a copy of the employee handbook to determine if it met all of the criteria of best practices.

<sup>20</sup> The district reported it responds to concerns within 24 hours; that the superintendent is accessible by email; that the HR Division has formed a principal advisory committee; and that the Office of Public Information conducts opening-of-school surveys and other constituent surveys.

<sup>21</sup> The district reported that department information is provided on its website. The team was unclear as to the relevance that the additional notes of the HR Division that “organization information of Human

- The HR Division has customer-friendly processes that enable employees, parents, and school board members to contact and to obtain information from knowledgeable sources at the district office.<sup>22</sup>
- **Standard 2:** The district’s HR Division has developed efficient and cost-effective policies and practices for providing substitute teachers and other substitute personnel.
  - The HR Division uses three (42.9 percent) of the seven indicators of best practices in this area, including--
    - The HR Division monitors rates of absenteeism among teachers and other essential employees.
    - The HR Division has clearly defined procedures for teachers and essential non-instructional personnel to notify the appropriate school or district officials of an anticipated absence and for substitutes to be contacted.
    - The HR Division equitably assigns substitutes among schools.<sup>23</sup>
  - **The HR Division reported partial or limited use of the following practices—**
    - The HR Division has defined what constitutes excessive absenteeism, and has developed policies/practices to deal effectively with the problems created by excessive absenteeism.<sup>24</sup>
    - The HR Division recruits and maintains a sufficient number of substitute teachers to cover most absenteeism peaks.<sup>25</sup>
    - The HR Division provides ongoing training and orientation for substitute teachers.<sup>26</sup>
- **Standard 3:** The district’s HR Division maintains personnel records in a highly efficient and accessible manner.

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Resources (is provided monthly) to teacher organization;” and that “Board management oversight workshops are televised.”

<sup>22</sup> The district reported that application receipt and status process needs improvement; and that a shared service center with cross-trained employees is under development.

<sup>23</sup> The district reported that it uses a Substitute Operating System (SOS) to assign substitutes to schools; but that substitutes can limit the geographic area, schools or grade levels to which they will go.

<sup>24</sup> The district reported that it uses information from the Los Angeles Unified School District to assess the statistical impact when there is an excess of four absentee days; and that the Chief Operating Officer is focusing on absenteeism this year with a presentation made to district principals during the week that the team visited the district.

<sup>25</sup> The district reported that its ability to recruit and maintain sufficient numbers of substitute teachers to cover absenteeism is school dependent.

<sup>26</sup> The district reported that it does orientation on a regular basis throughout the year. Nevertheless, that it does not provide ongoing training for current substitutes.

- The HR Division uses six (85.7 percent) of the seven indicators of best practices in this area, including--
  - The HR Division maintains personnel records, including confidential records, in accordance with State statutes and regulations.
  - The HR Division has an efficient and effective record-keeping system for both automated and hardcopy personnel records, and uses appropriate and cost-efficient archiving methods.
  - The HR Division uses automated record-keeping systems and minimizes the use of antiquated or time-consuming hardcopy record systems.
  - The HR Division has developed an automated personnel system that enables officials at school sites to access personnel records on the automated personnel system.
  - The HR Division can demonstrate that it updates personnel records in a timely manner.
  - Hardcopy records are generally filed into individual personnel records in a prioritized fashion so that needed records can be found in the file.
  
- **The HR Division does not use the following practice—**
  - When appropriate, personnel records can be amended by school personnel, diminishing the need for the transfer of paper from the school to the district office.
  
- **Standard 4:** The district's HR Division has developed cost-containment practices for its Workers Compensation Program.
  - The HR Division uses one (20 percent) of five indicators of best practices in this area, including<sup>27</sup>--
    - The HR Division has procedures that are distributed to all employees concerning prompt reporting of all on-the-job injuries.
  
  - **The HR Division does not use the following best practices<sup>28</sup>—**
    - The HR Division has a safety inspection program that determines the corrective actions necessary based upon past workers' compensation

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<sup>27</sup> The low level of compliance with these indicators results from the fact that the handling of pay claims, cost management, and contacting doctors is the responsibility of the county and state. The HR Division, however, has implemented direct care for Workers Compensation to specific clinics to control costs. The standard and five practices related to Workers Compensation were not included in the compilation of indicators practiced by the district.

<sup>28</sup> The district reported that it did not comply with these indicators because the county and state are responsible for handling paying claims, cost management, and contacting doctors. The Human Resources Department, however, has implemented direct care for Workers Compensation to specific clinics to control costs.

claim experience and proactive inspection of known and probable high-risk areas and professions.<sup>29</sup>

- The HR Division can demonstrate that it reviews its Workers Compensation Program to valuate workers' compensation claims and expenses.
  - The HR Division uses a comparison with state and national statistics, peer and area school districts, and as appropriate for some positions, other government agencies and private industry in the review of its Workers Compensation Program.
  - The HR Division uses the results of these evaluations to be proactive in attempts to cost effectively reduce frequency and cost of Workers Compensation claims.
- **Standard 5:** The district's HR Division has established and implemented accountability mechanisms to ensure the performance, efficiency, and effectiveness of its programs.
    - The HR Division uses two (50 percent) of the four indicators of best practices in this area, including—
      - The HR Division has clearly stated goals and measurable objectives that reflect the intent (purpose), expected outcomes of its program, and address the major aspects of the program's expenditures.<sup>30</sup>
      - The HR Division uses appropriate performance and cost-efficiency measures and interpretive benchmarks to evaluate its programs and uses these in management decision-making.
    - **The HR Division reported that it made limited use of the following practice—**
      - The HR Division regularly evaluates the performance and cost of its programs and analyzes potential cost savings of alternatives, such as outside contracting and privatization.<sup>31</sup>
    - **The HR Division does not use the following practice—**
      - The HR Division has established and implemented strategies to continually assess the reliability of its program performance and cost data.

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<sup>29</sup> The district reported that the program is done through the Director of Safety, who receives the information from the Human Resources Department.

<sup>30</sup> The district reported that it's Balanced Scorecard and new Data Dashboard sets stated goals and measurable objectives that reflect the purpose and expected outcomes of its program and address the major aspects of its programs' expenditures. It also reported that the Human Resources Department is currently developing a charter for implementing a new board policy on Effective Teachers and Administrators

<sup>31</sup> The district reported that it is conducting analyses to determine the cost benefit of using an online insurance open enrollment system; and various technologies to reduce paper.



- **Standard 6:** The district's HR Division periodically reviews the organizational structure and staffing levels of its office to minimize administrative layers and processes.
  - The HR Division uses one (20 percent) of the five indicators of best practices in this area--
    - At least annually, the director of the HR Division prepares a report to the superintendent and/or the school board on the activities of the program and on any changes that are needed to improve the organizational structure.
  - **The HR Division does not use any of the following best practices--**
    - The HR Division periodically conducts review of its organizational structure and staffing levels to minimize administrative layers and processes. The results of these reviews are provided in writing to the school board.
    - The HR Division periodically compares its own staffing levels to human resources operations in comparable districts using appropriate measures such as number of human resource staff per district employee or human resource cost per district employee, and reports the results of this review in writing to the school board.<sup>32</sup>
    - The HR Division can demonstrate that it has an appropriate structure and that staffing levels are reasonable based on applicable comparisons and/or benchmarks.
    - As presently aligned, the structure of the HR Division includes reasonable lines of authority and spans of control given the responsibilities of each organizational unit.<sup>33</sup>
- **Standard 7:** The district's HR Division periodically evaluates its personnel practices and adjusts these practices as needed to reduce costs and/or improve efficiency and effectiveness.
  - The HR Division uses six (66.7 percent) of the nine indicators of best practices in this area, including--

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<sup>32</sup> At the request of the district, the Council conducted a study in 2001 that compared the staffing levels of comparable human resources operations.

<sup>33</sup> The district indicated that issues related to the reasonableness of lines of authority and spans of control are being deferred pending the forthcoming upgrades to the Enterprise Resource Planning (ERP) system and how it will affect the district's organizational structure. The team noted that this is an additional example of a change being delayed pending upgrades to the ERP system.

- The HR Division periodically conducts a review of its service delivery to identify ways of reducing costs and improving efficiency and effectiveness.
  - The HR Division substantially implements the recommendations resulting from review of its service delivery.
  - The HR Division handles requests for personnel assistance from administrators and employees efficiently.
  - The HR Division makes use of automated phone systems, email, faxing, and the district website as a means of answering inquiries whenever possible.
  - The employee benefits offered by the district provide value to the employees at a level that justifies their costs to the district.
  - The HR Division identifies and adopts less costly approaches to providing employee benefits whenever possible.
- **The HR Division reported partial or limited use of the following best practices--**
- The HR Division periodically solicits feedback from staff throughout the district to determine whether its operations are serving the district effectively and efficiently.<sup>34</sup>
  - The HR Division puts the results of this feedback, including recommendations for program improvements, into writing to the superintendent and/or the school board.<sup>35</sup>
- **The HR Division does not use the following best practice—**
- To reduce the costs of writing checks, the HR Division requires all new employees to receive salary warrants through direct deposit unless the requirement is waived due to special circumstances.<sup>36</sup>
- **Standard 8:** For classes of employees that are unionized, the district’s HR Division maintains an effective collective bargaining process.
- The HR Division reported that none of the eight indicators were applicable since the district is in a “right-to-work” state.

### **Personnel Evaluation Practices**

The CMS Human Resources Division uses 19 (79.2 percent) of the 24 indicators of best practices in the area of personnel evaluations.

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<sup>34</sup> The district reported partial compliance by using the superintendent’s Teacher Advisory Council and principals to access efficiencies and effectiveness in operations.

<sup>35</sup> The district reported limited compliance since the only reported instance of using this practice was a September 2006 survey that was done by the Office of Public Information.

<sup>36</sup> The district reported that this practice is not encouraged.

- **Standard 1:** The district’s HR Division has designed a system for formally evaluating employees to improve and reward excellent performance and productivity, and to identify and address performance that does not meet the district’s expectations for the employee.
  - The HR Division uses 10 (66.7 percent) of the 15 indicators of best practices in this area, including—
    - The HR Division has established and implemented procedures for assessing the performance of all instructional personnel as required by State law, and these procedures have been approved by the Division of Education.
    - The HR Division provides written information regarding the performance assessment process to all personnel at the beginning of a rating period, including performance criteria that will be used in the assessment and the process that will be used to make the assessment.
    - The HR Division has performance criteria including measures and standards related to student outcomes for instructional personnel, as required by State law.
    - The HR Division provides employees with a written employee disciplinary procedure that includes provisions of due process.
    - The HR Division has developed a system for evaluating instructional employees that includes an appraisal of the employee’s content knowledge in the area of instruction.
    - The HR Division uses master teachers to assist in the evaluation of new teachers.
    - The HR Division has structured an evaluation process in such a way that poorly performing employees are clearly informed that their performance does not meet the district’s expectations.
    - When an employee’s performance does not meet expectations, the HR Division provides employees with a written notice as to when their performance will be reevaluated, and a copy of this notice is provided to the district.<sup>37</sup>
    - The HR Division has developed procedures regarding the maintenance of records regarding instructional employees who have been notified that their performance has been unsatisfactory, instructional employees who have been placed on probationary status, and disciplinary actions taken against instructional personnel due to poor performance or for any other reason.
    - The HR Division has developed policies regarding the drug testing of employees and regarding the provision of employee assistance to employees who are impaired by alcohol or drug abuse, in accordance with State law.

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<sup>37</sup> The district reported that it also provides an Action Plan to supplement the written notification process.

- **The HR Division partially uses the following best practices<sup>38</sup> --**
  - The HR Division regularly provides training, guidance, and coaching to persons who conduct personnel evaluations to ensure they evaluate personnel properly.
  - The HR Division developed a process by which it determines/verifies that immediate supervisors have completed performance evaluations at least once a year or as required by district policy.
  
- **The HR Division does not use the following best practices—**
  - The HR Division has developed and used a 360-degree evaluation procedure to solicit input from peers and subordinates, and, when appropriate, from parents and from other classes of employees.
  - The HR Division has developed and implemented policies and/or procedures that link a portion of instructional employee salary to measures of student performance.<sup>39</sup>
  
- **Standard 2:** The district’s HR Division ensures that employees who repeatedly fail to meet the district’s performance expectations, or whose behavior or job performance is potentially harmful to students, are promptly removed from contact with students, and that the appropriate steps are taken to terminate the person’s employment.
  
- The HR Division uses 100 percent of the nine indicators of best practices in this area, including—
  - The HR Division regularly provides training, guidance, and coaching to managers on the procedures and issues associated with working with poorly performing employees.
  - The HR Division has established procedures and criteria to identify the employee behaviors and performance problems that are potentially harmful to students.
  - The HR Division has developed a plan for ensuring that marginal or poorly performing employees receive counseling, individual development plans, official notice of probation and employee appeal procedures.
  - The HR Division has a process for monitoring the ongoing performance of marginal or poorly performing employees to ensure that either performance is improved or employment is terminated.

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<sup>38</sup> The district reported that both practices are limited to licensed staff. The practices are not HR responsibilities for classified personnel and other staff.

<sup>39</sup> The district indicated that it intends to initiate a pilot program in four schools in 2007-2008 that will link a portion of an instructional employee salary to measures of student performance.

- The HR Division has a process for monitoring the progress and performance of students who are under the instruction of a teacher who has been identified as a poor performer.
- At least one official in the HR Division is charged with the responsibility of working with principals to document poor performance appropriately and to provide administrative and legal consultation to the principals in making and implementing decisions to terminate employees.
- The HR Division has developed procedures that provide for the prompt investigation and resolution of allegations of behavior by district employees that is potentially harmful to students.
- The HR Division has developed procedures that expeditiously remove from contact with students those employees whose behavior, attitude, or performance may be harmful to students.
- The HR Division has procedures in place to ensure that poorly performing employees are not repeatedly transferred among school sites in lieu of termination of their employment.

### **Absenteeism & Personnel Records Management Practices**

The Human Resources Division reported 61.5 percent use of the 13 indicators of best practices in the area of absenteeism and personnel records management.

- **Standard 1:** The district’s HR Division has efficient and cost-effective systems for managing absenteeism and the use of substitute teachers and other substitute personnel.
  - The HR Division uses three (42.9 percent) of the seven indicators of best practices in this area, including—
    - The HR Division monitors rates of absenteeism and the use of substitutes among teachers and other essential employees.
    - The HR Division has clearly defined procedures for teachers and essential non-instructional personnel to notify the appropriate school or district officials of an anticipated absence and for substitutes to be contacted.
    - The HR Division provides ongoing training and orientation for substitute teachers.<sup>40</sup>
  - **The HR Division makes partial use the following best practices—**
    - The HR Division has defined the rate of absenteeism that requires review, and has developed policies/practices to deal effectively with the problems created by excessive absenteeism.<sup>41</sup>

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<sup>40</sup> The district indicated that the HR Division regularly provides orientation for substitutes throughout the year, but does not offer advanced, on-going orientation for current substitutes.

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- The HR Division recruits and maintains a sufficient number of substitute teachers to cover most absenteeism peaks.<sup>42</sup>
- The HR Division has implemented ways to decrease absenteeism, which may include an incentive program to reward good attendance.<sup>43</sup>
- **The HR Division does not use the following best practice—**
  - The HR Division routinely provides special assistance (training and oversight) to those who must substitute for extended teacher absences.
- **Standard 2:** The district’s HR Division maintains personnel records in an efficient and readily accessible manner.
  - The HR Division uses five (83.3 percent) of the six indicators of best practices in this area, including—
    - The HR Division maintains personnel records, including confidential records, in accordance with State statutes and regulations.
    - The HR Division uses automated record-keeping systems and minimizes the use of antiquated or time-consuming hardcopy record systems.
    - The HR Division has an efficient and effective record keeping system for both automated and hardcopy personnel records, including a system for the identifying and archiving old records.
    - The HR Division has established procedures to allow officials at school sites to access automated personnel records.
    - The HR Division can demonstrate that it updates personnel records in a timely manner, and, when dealing with a filing backlog, files hardcopy records in a prioritized fashion so that records can be found in the file.
  - **The HR Division does not use the following best practice—**
    - School administrators can amend personnel records without compromising the security of those records, this diminishing the need for the transfer of paper from the school to the district office.

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<sup>41</sup> The district reported that it uses the rate set by the Los Angeles Unified School District that defines four (4.0) absences as excessive. The district also indicated that the Chief Operating Officer has initiated a new initiative this school year to deal with absenteeism.

<sup>42</sup> The district indicated that the HR Division uses an automated call system to manage the substitute program, but that its ability to recruit and supply sufficient numbers of substitutes is dependent upon the geographic areas, schools, and grade levels.

<sup>43</sup> The district reported that it has implemented a “Pay for Performance” program in a number of pilot schools and for bus drivers.

### **2. Recommendations**

The Strategic Support Team did not make specific recommendations related to the district's self-assessment. A careful review by the Human Resources Division of the best management practices that are not and/or only partially used should lead to the adoption of those which would improve the district's human resources management operations. In doing so, the team encourages the Division to examine the following areas carefully--

- Planning, coordinating, providing, and evaluating staff and professional development programs in both non-instructional and instructional areas.
- Salary and competitive benefits packages adjustments to compete for highly qualified applicants and to retain them after employment.
- The entire range of management practices of the HR Division with particular focus on the following—
  - Communications channels with employees.
  - Policies and practices providing substitute teachers and other personnel.
  - Workers Compensation cost-containment practices.
  - Accountability measures to ensure efficiency and effectiveness in HR.
  - The organizational structure and staffing levels of the HR Division.
  - Evaluation and adjustment of personnel practices to reduce costs and improve efficiencies and effectiveness.
- Evaluation and termination procedures to ensure students are not impacted by employees who fail to meet performance expectations or whose behavior is potentially harmful to students.
- Efficient and cost-effective systems for managing absenteeism and the use of substitute personnel.
- The efficient and readily accessible manner of maintaining personnel records.

## **V. CONCLUSION**

As noted in the Executive Summary of this report, the Charlotte-Mecklenburg Schools has consistently been recognized as a leader in public education and has been seen on the cutting edge of innovative instructional and academic programs.

The Executive Summary goes on to point out that even though student achievement is above state and national averages, the district is under constant pressure to improve performance. It faces demanding challenges related to increased student enrollments, expanded student diversity, more complex educational requirements, and often conflicting interest group pressures with mounting and restrictive budget constraints.

As a starting point, the Council and the Strategic Support Team working on this project recommend that the district adopt a new management philosophy and organizational structure that reengineers human resources and realigns its functions with the district's broader strategic objectives. This would move human resources away from a division that has increasingly been performing personnel functions that are largely transactional in nature, that provides limited "value-added" to the district, and fails to provide the strategic "human capital" that is essential to accomplishing the district's strategic objectives.

The rationale for reengineering human resources is grounded in the following three premises. First, the ability of Charlotte-Mecklenburg to meet the challenges it faces depends on its organizational ability to learn and grow. Second, the enablers for learning and growth come primarily from employees, systems, and organizational alignment. Third, strategies for superior performance require significant investments in people, systems, and processes that build the district's capabilities. Consequently, objectives and measures for these enablers of superior performance should be human resource driven and an integral part of district performance.

As envisioned, human resources should be the district's leader in attracting, developing, and retaining a highly motivated and strategically focused workforce. A core group of three employee-based measures – satisfaction, productivity, and retention – would provide outcome measures from investments in employees, systems, and organizational alignment. The drivers of these outcomes would include indices of strategic job coverage, strategic information availability, and degree of personal, team, and departmental alignment with strategic objectives.

The Strategic Support Team is available to clarify any of the findings and recommendations in this report, and provide any additional assistance if required.



**APPENDIX A: WORKING AGENDA**

**Strategic Support/Technical Assistance Team  
Human Resources Operations  
Charlotte-Mecklenburg Schools  
October 15-18, 2006**

**Contact: Kathy Auger**  
**Assistant Superintendent, Human Resources**  
**Office: 980.343.6610**  
**Cell: 704.574.8057**

**Sunday, October 15**

**Team Arrival**  
Embassy Suites  
4800 South Tyron Street  
Charlotte, NC 28217  
(704) 527-8400

7:00 p.m.

**Dinner Meeting**

Mr. Maurice O. Green, COO

**Monday, October 16**

8:00 - 9:30 a.m.

**Team Meeting**  
701 E. 2<sup>nd</sup> Street

**Dr. Ruth Perez, CAO**  
**Guy Chamberlain**  
Assoc. Supt., Auxiliary Svcs.  
**Sheila Shirley**  
Chief Financial Officer  
**Muffet Garber**  
Assoc. Supt., Educational Svcs.  
**Ms. Nora Carr**, Communications Officer  
**Robert Avossa**, Chief of Staff

10:00 - 11:30 a.m.

**Team Meeting**

**Kathy Auger**  
Acting Asst. Supt., HR  
**Executive Coordinator**

12:00 - 1:00 p.m.

Working Luncheon

1:00 - 2:30 p.m.

**Team Meeting**

**Vincent Smith**  
Exec. Dir., HR Admin.  
**Monique Witherspoon**  
Ex. Dir., Employment/Licensure  
**Janet Hamilton**  
Ex. Dir., Employee Relations

2:30 - 4:00 p.m.

**Team Meeting**

**John Brady**  
Dir., Employment  
**Teresa Shipman**  
Dir., Licensure  
**Evelyn Coston**  
Dir., Recruitment

## **Review of Human Resource Operations in the Charlotte-Mecklenburg Schools**

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2:30 - 4:00 p.m.	<b>Team Meeting</b>	<b>Janice Richardson</b> Dir., HRIS <b>Carrie Miranda</b> Dir., Benefits & Compensation
4:00 - 5:30 p.m.	<b>Team Meeting</b>	<b>Employee Relations Specialists</b> <b>Orientation Coordinator</b> <b>Compliance Information Technician</b> <b>Compliance Coordinator</b>

5:30 p.m.	Team Discussion of Work Plan for Balance of Site Visit
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### **Tuesday, October 17**

8:00 - 9:00 a.m.	<b>Team Meeting</b>	<b>Employment Analysts</b> <b>Licensure Case Managers</b> <b>Certificated &amp; Non-Instructional</b> <b>Managers &amp; Employment Analysts</b>
9:00 - 10:00 a.m.	<b>Team Meeting</b>	<b>HRIS Analyst</b> <b>Data Analyst</b> <b>Technician, Applicant Flow</b> <b>Substitute Operating System Tech.</b> <b>HRIS Technician</b> <b>JPS Technician</b> <b>HR Records Technician</b>
10:00 - 11:00 a.m.	<b>Team Meeting</b>	<b>Benefits Supervisor</b> <b>Employee Benefits Reps.</b> <b>Benefits Technician</b> <b>Compensation Specialists</b> <b>Comp. &amp; Benefit Specialist</b>
11:00 - 12:00 a.m.	<b>Team Meeting</b>	<b>Teacher Association Representatives</b>

12:00 - 1:00 p.m.	Working Luncheon
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1:00 - 2:30 p.m.	<b>Team Meeting</b>	<b>Lawson Transition Team</b>
2:30 - 4:00 p.m.	<b>Team Meeting</b>	<b>Regional Superintendents</b>
4:00 - 5:30 a.m.	<b>Team Meeting</b>	<b>Principals, Randomly Selected</b>

### **Wednesday, October 18**

8:00 - 12:00 Noon.	<b>Team Meeting</b>	<b>Discussion of Findings &amp; Recommendations</b>
12:00 - 1:00 p.m.	Working Luncheon Debriefing	<b>Mr. Maurice O. Green, COO</b>
1:00 p.m.	Adjournment & Departures	

**APPENDIX B: DOCUMENTS REVIEWED**

- District Organization Chart
- HR Organization Chart
- HR Staffing Roster
- 2006-07 Budget
- Comprehensive Annual Financial Report
- BOE Vision, Mission and Core Beliefs and Commitments
- BOE Theory of Action
- BOE Summary of Reform Policies
- BOE Reform Policies
- Board Policies and Administrative Regulations
- Lawson “As Is” Documents/Future Scripts/
- Future Process Flows for Licensure, Compensation, Employment, Employee Relations, Staffing Control/Position Management, HRIS, Benefits
- CMS and Charlotte Chamber – Efficiency and Effectiveness Review
- Program Audit - Ensuring That Our Schools Have the Best Teachers
- Phase 1 Vision for Licensure, Compensation, Employment, Position Management, Employee Data Management (HRIS), Benefits, Time and Attendance
- Future ERP System Overview (Lawson) and Legacy System Data Sheets
- CMS 2006-07 Opening of Schools Survey
- Balanced Scorecard
- High School Challenge Reform Presentation
- Compensation Presentation
- 2005 Legislative Agenda
- 2006 Legislative Agenda
- 2006-07 Evaluation Guide
- Recruitment Packet

**APPENDIX C: INDIVIDUALS INTERVIEWED**

- Mr. Maurice O. Green, Chief Operating Officer
- Dr. Ruth Perez, Chief Academic Officer
- Guy Chamberlain, Assoc. Supt., Auxiliary Services
- Sheila Shirley, Chief Financial Officer
- Muffet Garber, Assoc. Supt., Educational Services
- Nora Carr, Communications Officer
- Robert Avossa, Chief of Staff
- Kathy Auger, Acting Asst. Supt., HR
- Denis Corbett, Executive Coordinator
- Vincent Smith, Exec. Director, HR Administration
- Monique Gardner-Witherspoon, Executive Director, Employment & Licensure
- Janet Hamilton, Executive Director, Employee Relations
- John Brady, Director, Employment
- Teresa Shipman, Director, Licensure
- Evelyn Coston, Director, Recruitment
- Janice Richardson, Director, HRIS
- Carrie Miranda, Director, Benefits & Compensation
- Sharon Pringle, Employee Relations Specialist
- Ellent Seth, Compliance Information Coordinator
- Tia Cooper, Orientation Coordinator
- Kay Cunningham, Employee Relations Specialist
- Regine George, Employee Relations Specialist
- Carla Chambers, Employment Analysts
- Sharon Leake, Employment Analysts
- Jeff Peckham, Employment Analysts
- Randy Caudle, Employment Analysts
- Nancy Wilson, Employment Analysts
- Coni Johnson, Employment Analysts
- Sheil Allsbury, Employment Analysts
- Teresa Clark, Employment Analysts
- Jacqueline Robinson, Employment Analysts
- Greg Sweet, Employment Analysts
- Ellen Stewart, Employment Analysts
- Sandra Wood, Employment Analysts
- Christianna Williams, Employment Analysts
- Cindy Jeffares, Employment Analysts
- Flo Sessoms, Employment Analysts
- Robert Cannon, Employment Analysts
- Lewis Walker, Employment Analysts
- Mike Hodge, Employment Analysts
- Cardner Johnson, Employment Analysts
- BJ Greene, Employment Analysts
- Jane Ridgell, Employment Analysts

## **Review of Human Resource Operations in the Charlotte-Mecklenburg Schools**

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- Selina Parks, Employment Analysts
- Sopona In, Employment Analysts
- Paula Rinnix, Employment Analysts
- Suzanne Carpino, Employment Analysts
- Amanda Dahmer, HRIS Analyst
- Sheila Williams, Sr. Admin Sec
- Nancy Crosby, HRIS Technician
- Jacqueline Douglas, Applicant Flow Tech
- Pay Kelly, HRIS Records Technician
- Cassandra Atkinson, SOS Technician
- Willis Young, HRIS Analyst
- Jerome Rhodes, Benefit Representative
- Shamaine Howard, Benefits Representative
- Eileen Dretts, Benefits Supervisor
- Pat Rocca, Compensation Specialist
- Lynda Pearl, Compensation Specialist
- Susan Sith, Benefits Representative
- David Ferguson, Benefits Representative
- Ann Hay, Benefits Representative
- Shirley Clark, Benefits Representative
- Shenite Ihekaine, Benefits Technician
- Andy Smith, Comp Specialist
- Judy Kidd, President of the Classroom Teachers Association
- Mary McCray, Classroom Teachers Association
- Terry Middleton, Chief Information Officer
- Jim Haugen, Project Manager, (Lawson)
- Jan Richardson, Director, HRIS
- Muffet Garber, Regional Superintendent
- Jane Rhyne, Regional Superintendent
- Carolyn Hubbard, Regional Superintendent
- Louis Layne, Regional Superintendent
- James Hammond, Regional Superintendent
- Nora Carr, Regional Superintendent
- Principals

**APPENDIX D: STRATEGIC SUPPORT TEAM BIOS**

**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, Human Resources Directors, and Chief Information Officers and Technology Directors; fields 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 bachelor's 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.

**Daniel Cochran**

**Dan G. Cochran** has more than 25 years experience in human resources, having served as Chief Human Resources Officer in Atlanta, Georgia and Broward County, Florida. He currently works as a consultant with the Chief Human Resources Officer and Chief Personnel Officer in the Los Angeles Unified School District. Mr. Cochran has successfully implemented major school district human resource "re-engineering" in both the southeast and west coast. His primary emphasis is in strategic planning and customer focused results and has a proven record of accomplishment of achievement in all primary human resources functional areas including recruitment, employment, payroll, benefits, compensation, evaluation, documentation, employee relations, union negotiations, staff development, employee services, and employee retention. In addition to his extensive experience, Mr. Cochran has completed doctoral and legal course work, served on various regional and state committees and has made presentations at both state and national conferences.

**Shae Goodman-Robinson**

**Shae Goodman-Robinson** is currently serving as the Executive Director of Human Resources for the Jackson Public School District in Jackson, Mississippi. She has served in the field of education for 23 years. During that time, she has been a science teacher, curriculum coordinator of science (K-12), Assistant Principal, Middle School Principal, and an Executive Principal. She has served in the position of Executive Director of Human Resources since 2003. In this position, she is responsible for providing HR services to the District's 4,800 classified and certified employees. Under her leadership, the department has experienced an increase in its recruitment efforts with a Director of Teacher Recruitment, developed recruitment videos, maintained for the past three years an accredited personnel status with our Mississippi Department of Education, and surpassed our 95 percent substitute teacher fill-rate for the 2005-2006 school year as well

as for the current 2006-2007 school year. Ms. Goodman-Robinson is a graduate of the University of Southern Mississippi.

**Ascension Juarez**

**Ascension V. Juarez** has served as the Chief Human Resources Officer of the Chicago Public Schools (CPS) since 2002. Under his leadership, the department has experienced the most successful recruiting seasons in the history of the CPS; online staffing has been fully implemented; the substitute fill-rate has remained at near 100 percent level; and turnaround time for personnel transactions has been cut to 24 hours. Currently, the department is in the midst of a massive restructuring initiative that will provide even greater service to principals, teachers, and non-teaching employees. During his career with the CPS, Ascension has served as a teacher, curriculum writer, coordinator in Employee Relations, coordinator in Salary Administration and Staffing, principal, and director of Salary Administration, Staffing, & Employee Records before being selected by Mr. Arne Duncan, Chief Executive Officer of the CPS, to head up the Department of Human Resources. Mr. Juarez is also a key member of the strategic bargaining team that negotiated the latest contracts with the Chicago Teachers Union and the six different unions that represent non-teaching employees of the CPS.

**Wendy Macy**

**Wendy Macy** is the Personnel Director for the Los Angeles Unified School District responsible for human resources services for the District's 40,000 classified employees. She has 15 years legal, human resources and risk management experience. Ms. Macy has been at the LAUSD since 2001, and her projects and responsibilities have included creation of a risk management department, employee absence management, development of labor cost data, health benefits, workers' compensation, and employee wellness. She currently heads a staff in classification and compensation, recruitment and selection, assignments, and professional development of classified employees, as well as discipline and examination appeals. She is a graduate of Harvard College, magna cum laude, and Harvard Law School, cum laude, and is admitted to practice in federal and state courts in California and Pennsylvania. Currently the Personnel Commission is engaged in strategic support of the LAUSD with three goals of organizational design and development, recruitment and selection of the best talent and capacity building, and professional development to improve district staff.

**APPENDIX E: COUNCIL REVIEWS**

<b>City</b>	<b>Area</b>	<b>Year</b>
Albuquerque		
	Facilities and Roofing	2003
	Human Resources	2003
	Information Technology	2003
	Special Education	2005
	Legal Services	2005
Anchorage		
	Finance	2004
Broward County (FLA.)		
	Information Technology	2000
Buffalo		
	Superintendent Support	2000
	Organizational Structure	2000
	Curriculum and Instruction	2000
	Personnel	2000
	Facilities and Operations	2000
	Communications	2000
	Finance	2000
	Finance II	2003
Caddo Parish (LA.)		
	Facilities	2004
Charleston		
	Special Education	2005
Charlotte-Mecklenburg		
	Human Resources	2006
Cincinnati		
	Curriculum and Instruction	2004
Cleveland		
	Student Assignments	1999, 2000
	Transportation	2000
	Safety and Security	2000
	Facilities Financing	2000
	Facilities Operations	2000
	Transportation	2004
	Curriculum and Instruction	2005
Columbus		
	Superintendent Support	2001
	Human Resources	2001
	Facilities Financing	2002
	Finance and Treasury	2003



## Review of Human Resource Operations in the Charlotte-Mecklenburg Schools

	Budget	2003
	Curriculum and Instruction	2005
Dayton		
	Superintendent Support	2001
	Curriculum and Instruction	2001
	Finance	2001
	Communications	2002
	Curriculum and Instruction	2005
	Budget	2005
Denver		
	Superintendent Support	2001
	Personnel	2001
	Curriculum and Instruction	2005
	Bilingual Education	2006
Des Moines		
	Budget and Finance	2003
Detroit		
	Curriculum and Instruction	2002
	Assessment	2002
	Communications	2002
	Curriculum and Assessment	2003
	Communications	2003
	Textbook Procurement	2004
	Food Services	2006
Greensboro		
	Bilingual Education	2002
	Information Technology	2003
	Special Education	2003
	Facilities	2004
	Human Resources	2006
Hillsborough County		
	Transportation	2005
	Procurement	2005
Jacksonville		
	Organization and Management	2002
	Operations	2002
	Human Resources	2002
	Finance	2002
	Information Technology	2002
	Finance	2006
Kansas City		
	Human Resources	2005
	Information Technology	2005

## **Review of Human Resource Operations in the Charlotte-Mecklenburg Schools**

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	Finance	2005
	Operations	2005
	Purchasing	2006
	Curriculum and Instruction	2006
Los Angeles		
	Budget and Finance	2002
	Organizational Structure	2005
	Finance	2005
	Information Technology	2005
	Human Resources	2005
	Business Services	2005
Louisville		
	Management Information	2005
Miami-Dade County		
	Construction Management	2003
Milwaukee		
	Research and Testing	1999
	Safety and Security	2000
	School Board Support	1999
	Curriculum and Instruction	2006
Minneapolis		
	Curriculum and Instruction	2004
	Finance	2004
	Federal Programs	2004
Newark		
	Curriculum and Instruction	2006
New Orleans		
	Personnel	2001
	Transportation	2002
	Information Technology	2003
	Hurricane Damage Assessment	2005
	Curriculum and Instruction	2006
Norfolk		
	Testing and Assessment	2003
Philadelphia		
	Curriculum and Instruction	2003
	Federal Programs	2003
	Food Service	2003
	Facilities	2003
	Transportation	2003
	Human Resources	2004
Pittsburgh		
	Curriculum and Instruction	2005

## **Review of Human Resource Operations in the Charlotte-Mecklenburg Schools**

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	Technology	2006
	Finance & Budget	2006
Providence		
	Business Operations	2001
	MIS and Technology	2001
	Personnel	2001
Richmond		
	Transportation	2003
	Curriculum and Instruction	2003
	Federal Programs	2003
	Special Education	2003
Rochester		
	Finance and Technology	2003
	Transportation	2004
	Food Services	2004
San Diego		
	Finance	2006
	Procurement	2006
	Food Service	2006
San Francisco		
	Technology	2001
St. Louis		
	Special Education	2003
	Curriculum and Instruction	2004
	Federal Programs	2004
	Textbook Procurement	2004
	Human Resources	2005
Toledo		
	Curriculum and Instruction	2005
Washington, D.C.		
	Finance and Procurement	1998
	Personnel	1998
	Communications	1998
	Transportation	1998
	Facilities Management	1998
	Special Education	1998
	Legal and General Counsel	1998
	MIS and Technology	1998
	Curriculum and Instruction	2003
	Budget and Finance	2005
	Transportation	2005
Wilmington		
	Curriculum and Instruction	2006

**APPENDIX F: ABOUT THE COUNCIL**

The Council of the Great City Schools is a coalition of sixty-six (66) of the nation's largest urban school systems. Its Board of Directors is composed of the Superintendent of Schools and one School Board member from each member district. An Executive Committee of twenty-four (24) individuals, equally divided in number between Superintendents and School Board members, provides oversight of the 501(c)(3) organization in-between Board meetings.

The mission of the Council is to advocate for and to assist in the improvement of public education in the nation's major cities. To meet that mission, the Council provides services to its members in the areas of legislation, research, communications, teacher recruitment, curriculum and instruction, and management.

The group convenes two major conferences each year on promising practices in urban education; conducts studies on urban school conditions and trends; and operates ongoing networks of senior managers in each city with responsibility in such areas as federal programs, operations and finance, personnel, communications, research, technology, and others. The Council, founded in 1956 and incorporated in 1961, has its headquarters in Washington, D.C.