In late 2007, Dr. Maria Goodloe-Johnson and Donald Kennedy, the Superintendent and Chief Financial and Operating Officer (CFOO), respectively, of the Seattle Public Schools, requested the Council of the Great City Schools to conduct a high-level management review of the schools district’s human resources, financial, and technology operations. Specifically, the Council was requested to—

- Review and evaluate the leadership, management, organization, and operations of the respective departments.

- Develop recommendations and proposals that would help the departments achieve greater operational efficiency and effectiveness.

In response to this request, the Council assembled a series of Strategic Support Teams comprised of senior managers with extensive experience in human resources, finance, and information technology in other major city school systems across the country. The teams involved the following individuals (Attachment A contains brief resumes of team members)—

- **Project Staff**
  
  Bob Carlson, Project Director  
  Director, Management Services  
  Council of the Great City Schools  

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

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1 The Council has conducted nearly 150 instructional, management, and operational reviews in about 45 big-city school districts over the last several years. The organization conducts these reviews using Strategic Support Teams of current and former senior managers with strong reputations for developing and promoting effective operations and best practices in major urban school systems across the country. The reports generated by these reviews are often critical, but they also have been the foundation for improving the operations, organization, instruction, and management of many urban school systems. In other cases, the reports are complimentary and form the basis for identifying “best practices” for other urban school systems to replicate. (Attachment E lists the reviews that the Council has conducted.)

2 The Council thanks The Broad Foundation for providing financial support for this project.
• **Human Resources**

Ann Chan, Director of Human Resources Operations
Chicago Public Schools

Tomas Hanna, Deputy Superintendent and Chief of Operations
Providence Public Schools

Barbara Jenkins, Chief of Staff
School District of Orange County (Orlando)

Ascencion Juarez, Chief Human Resources Officer
Chicago Public Schools

Wendy Macy, Director, Personnel Commission
Los Angeles Unified School District

Sue Wybraniec, Executive Director of Human Resources
Tucson Unified School District

• **Finance**

James Beall
Chief Financial Officer
Prince George’s County Public Schools

Michael Eugene, Business Manager
Los Angeles Unified School District

Kenneth Gotsch, Former Chief Financial Officer
Chicago Public Schools & Los Angeles Unified School District

William Kowba, Chief Financial Officer
San Diego Unified School District

Pedro Martinez, Chief Financial Officer
Chicago Public Schools

• **Information Technology**

Mike Casey, Executive Director
San Diego Unified School District

Russell Doupnik, Executive Director
Charleston County Public Schools
To conduct their work, the Strategic Support Teams reviewed documents provided by school district staff before visiting the Seattle Public Schools. The teams also examined additional documents, reports, and data during their visits. (A list of documents reviewed by the teams is presented in Appendix B.)

The teams conducted fieldwork for the project during four-day site visits to Seattle on January 15-18, January 29-February 1, and February 3-6, 2008. The general schedules for the site visits are described below. (The detailed Working Agendas for each of the site visits are presented in Appendix C.)

The teams met with the Superintendent and Chief Financial/Operating Officer on the first night of their visits to understand their expectations and objectives for the reviews, and to make last-minute adjustments to the work schedules. The teams used the first two full days of the site visits to conduct interviews with key staff members.\(^3\) (Complete lists of individuals interviewed are included in Appendix C.) The final day of each visit was devoted to outlining and synthesizing the teams’ findings and recommendations, and to debriefing senior management.

The Council sent drafts of each section of this report to the respective team members for their review to ensure accuracy and obtain concurrence with the recommendations. This management letter contains the findings and recommendations that have been developed by each team to improve the operational efficiency and effectiveness of each of the departments reviewed.

### A. Human Resources

The Human Resources Department of the Seattle Public Schools is staffed with 53.5 full-time equivalent (FTEs) positions that are organized into five Service Teams that

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\(^3\) The Council’s peer reviews are based on interviews of staff and others, a review of documents provided by the district, observations of operations, and professional judgment. The teams 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.
report to the Director. The department is responsible for a full range of personnel and payroll functions, including—

- Recruitment
- Staffing
- Classification
- Compensation
- Contract administration
- Labor relations
- Employee discipline support
- Affirmative action
- Payroll
- Benefits administration
- Leave administration

The school district’s management has recognized that the department plays a critical role in district operations, but that the department is not functioning in an efficient and effective manner. While the human resources operation has been plagued with service issues for a number of years, the 2007-08 school year has been particularly difficult. The pre-existing problems have been amplified by—

- The implementation of a new HR/payroll system
- The transfer of the Payroll Unit from the Finance Services Division to the Human Resources (HR) Department and the splitting of payroll staff between HR, Accounts Payable, and Information Technology
- The reorganization of the Human Resources Department into Service Teams

The Superintendent recognizes that the problems with human resources operations are a significant distraction from the district’s mission.

Findings and Observations

The Council’s Strategic Support Team findings and observations in human resources are organized into four general areas: Commendation, Leadership and Management, Organization, and Operations.

กระจาย Commendation

- The district’s senior management efforts to identify and address many of the serious issues facing the HR department are commendable.4

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4 An analysis prepared by the outgoing HR Director in November 2007 included a matrix of issues by departmental function. A second analysis prepared by the district’s General Counsel in December 2007
Leadership and Management

- The Human Resources Department has had six Directors over the last eight years. That turnover, coupled with the fact that some of the directors lacked experience with K-12 school operations and were unfamiliar with the district’s culture, has resulted in inconsistent leadership and organizational instability.

- The HR Department has failed to address long-standing systemic management and operational issues.

- The department lacks a strategic business plan that sets goals and objectives and measures progress against them.

- The most basic personnel information, e.g., numbers of vacancies, turnover rates, numbers of applicants, recruitment yields, or transaction processing time, is not compiled, tracked, reported, or monitored.

- The 2007 implementation of the new HR/Payroll system was plagued with the following problems—
  - There was no clearly defined executive sponsor or owner of the project.
  - The technical leads assigned to the project did not have the needed skills or resources.
  - Stakeholders were not fully engaged in the process.
  - There was little effort to manage the requisite change processes.
  - The initial and post-implementation phases were under-funded and understaffed.
  - The project suffered from a nearly complete turnover of staff.²
  - User training was too broad and was conducted four months before implementation.
  - Accurate procedural manuals and quick reference guides were not provided to system users.
  - The technical consultants for the e-recruit component of the system were not engaged until six months after implementation.

provided the Superintendent with a comprehensive overview of the operation and an insightful enumeration of its shortcomings.

² The team was told that no one from the original implementation team is still with the district.
• The department does not have a customer focus and is generally viewed by its customers as non-responsive and not accessible. For example--
  
  o Service expectations have not been set for the HR staff.
  
  o Focus groups and customer surveys are not used to gauge service performance.
  
  o Customers report that job openings are not described accurately or posted on a timely basis.
  
  o School principals get involved in getting staff concerns resolved because HR staff reportedly does not return employee phone calls.
  
  o The failure to fill critical positions in a federally funded program could result in the loss of funds to the district.
  
  o The team was told that HR’s failure to provide needed data on teacher qualifications is holding up $3 million in categorical funds to the district.

• The inability of HR to process disciplinary actions and union grievances on a timely or consistent basis may be resulting in the retention of possibly unsuitable personnel and financial losses to the district.

• Staff morale in the department is low and there is no sense of urgency in the work that is performed by staff.

• The department managers have observed passive/aggressive resistance to change within HR.

• The department has lost the trust and confidence of its customers.

• Alleged breaches of confidentiality have marginalized the effectiveness of the Employee Assistance Program.

**Organization**

• The Human Resources Department does not report directly to the Superintendent, but has an unorthodox reporting relationship to the Office of the General Counsel who, in turn, reports to the Superintendent.  

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6 The team was told that the reporting lines resulted from the willingness of the General Counsel to take on the operational challenges of the department.
The mid-2007 reorganization of the HR Department into a “matrix organization” comprised of five Service Teams that were charged with performing the full array of HR services for the central office and five Instructional Directors was poorly planned, timed, executed, and communicated. For example--

- Reorganizing the department while implementing a new payroll system impeded the district’s ability to do either successfully.
- The titles, positions, salary levels, roles, and responsibilities of Service Team members were not redefined.
- There was no assessment of skill sets to determine if the right people were assigned to the right positions.\(^7\)
- Functional silos exist within each of the Service Teams because members were not cross-trained.\(^8\)
- When a member of a Service Team is absent the absence creates delays in work flows and responses to customers.
- The Service Teams interpret policies, procedures, and collective bargaining agreements in potentially inconsistent ways.
- The technical leadership in areas such as payroll and labor relations was lost in the reorganization.
- The department’s office layout is not conducive to Service Team interaction.
- The effort to reorganize the HR Department into a matrix organization to serve schools in each of the instructional divisions was undermined when the schools assigned to the five Service Teams were not the same as the schools that are assigned to the five Instructional Directors.
- Only one of five principals interviewed could identify the Service Team and team leader who had been assigned to them because the reorganization was poorly communicated.
- Informal relationships, pre-existing contacts, and “work-arounds” are used by school administrators to get needed services.

\(^7\) The lack of human resource professionals within the department maybe the reason that the reorganization of the HR Department, as well as other efforts to address management and operational issues, have not succeeded.

\(^8\) One reason for creating the Services Teams was to break down the functional silos that had existed within the HR Department. The failure to cross-train the staff assigned to the Service Teams, however, merely allowed the re-emergence of multiple, but smaller, versions of the same functional silos.
• There is no single authority to resolve payroll issues, concerns or questions because the people with the technical expertise have been reassigned to the HR Service Teams, the Finance Department, and the Department of Technology.

• The Labor Relations Director’s position has been vacant since 2004 and the ensuing lack of labor-relations expertise has resulted in inconsistent interpretations of contracts, deteriorating relationships with the district’s bargaining units, and increases in grievances, arbitrations, and costly litigation.

**Operations**

• There is no overall recruitment plan or staffing time lines because the application and selection process is decentralized.

• The district’s decentralized teacher application and selection process is cumbersome, inefficient, time consuming, and does not yield sufficient quantifiable data to measure outcomes. For example—

  o Qualified applicants are lost to other school systems because district recruiters do not have the authority to offer employment contracts.

  o Rather than submitting a single application for district employment, teacher candidates must submit separate applications to and are required to be interviewed by each school where they have an interest in working. (No interview notes are maintained, however, to document the process).

  o The application and selection process has led to the perception that the teaching staff work for individual schools rather than the district.

  o There is no concerted effort to hire for diversity and quality as called for by Board policy. The effort to achieve gender, ethnic, and racial diversify is undermined since, as reported to the team, schools tend to hire applicants who “look like the rest of the faculty”.

  o There is no follow-up to determine why teacher candidates go elsewhere because interview notes are not maintained.

• There is no plan for filling positions in high-poverty schools, which tend to have higher opening-day and ongoing vacancies.

• There are no standards for hiring new teachers. The process was described to the team as the “fly-paper system—whoever happens to stick is hired.”

• There is no career ladder to enable paraprofessionals or teacher aides to become credentialed teachers.
The district’s payroll system could be at risk for the following reasons—

- There is no empirical data on the number or severity of payroll errors. Information provided to the team on payroll errors was anecdotal and based on the number of recorded phone-call complaints.
- The team heard examples of overpayments, underpayments, and non-payments.
- The team was told that there are insufficiently detailed reports to reconcile the payroll expenditures to the district’s General Ledger salary accounts.
- Monthly transmittals to the state retirement department are not reviewed for accuracy.
- The Employee Benefits Administrator (broker) reportedly cannot effectively or accurately administer the program because he does not have access to the district’s employment and payroll information.
- The district has no position-control system in place.
- Two separate sets of personnel files are maintained, i.e., one for payroll and another for everything else

The HR Department underutilizes the functionalities of the district’s computer (ERP) systems. For example—

- Requests for reports are sent to a Department of Technology programmer because there is no ad hoc reporting capability in HR.
- The team saw evidence that the use of spreadsheets rather than the district’s integrated systems has created isolated information islands (i.e., “work-arounds”).
- The e-recruitment function has not been fully implemented.
- The use of an inefficient, paper-driven payroll system for substitutes has resulted in substantial overtime costs.

The HR Department lacks standard operating procedures and uniform work flows for core functions. For example—

- The team heard that past practices and oral agreements often supersede bargained contract language.
- HR procedures were described by one manager as “folklore.”
The Request to Staff Vacant Position (RSVP) with which principals reported they were comfortable has been discontinued without a replacement.

Principals indicated that the hiring process for assistant principals was unclear and confusing.

Principals work around HR to fill vacant positions.

The displaced teacher process is unclear and results in hiring delays.

- It appears that the HR department is not giving adequate attention to a number of compliance issues including Workers’ Compensation, Unemployment Insurance claims, the Americans with Disabilities Act, the Family and Medical Leave Act, the Fair Labor Standards Act, notices to teachers of credential renewal requirements, and Highly Qualified Teacher reporting under the No Child Left Behind (NCLB) Act.

- A number of the school board’s HR policies appear to be outdated or incongruent.
  - The policy on employee substance abuse, for example, only deals with situations that occur on district premises or while conducting district business.

- New and continuing employees have limited training and professional development opportunities.

- Staff members do not participate in local, state, or national professional human resources activities.

**Recommendations**

1. Move swiftly to appoint a professional Director of Human Resources with special consideration given to candidates with K-12 experience and effective change-management skills.

2. Conduct a comprehensive independent audit of the district’s new payroll system to determine the scope, causes, and severity of underpayment, overpayment, and non-payments, and take corrective actions to make it an effective and efficient operation.

3. Allocate the resources necessary to maximize the functionality of the district’s HR computer systems including—
   a. Establishing a position control system
   b. Fully implementing the e-recruitment system
c. Upgrading and interfacing the computerized substitute-teacher calling system with the payroll system

4. Require the new Director of Human Resources, as a condition of employment, to create—
   a. A departmental business plan with a strategic vision, goals, objectives, and measurable performance indicators
   b. Formalized processes for determining customer needs and evaluating customer satisfaction with delivered services

5. Consider establishing the HR department as a direct report to the Superintendent, at least until major problems are solved.

6. Consolidate the payroll staff into a unit managed by technically competent payroll professionals.

7. Reestablish the Labor Relations Unit within the HR Department and consolidate all labor relation functions under its director.

8. Reconstitute the HR Service Teams (exclusive of payroll and labor relations functions), define/redefine job descriptions and position qualifications, and fill the positions with staff members who possess the appropriate skill sets and willingness to do the work.

9. Restructure the district’s recruitment, application, and selection processes with appropriate yearly timelines and deliverables that—
   a. Set employment standards
   b. Allow recruiters to contract with highly qualified applicants
   c. Use a single district employment application
   d. Document candidate interviews
   e. Focus on filling vacancies in hard-to-staff schools
   f. Obtain data on why qualified applicants choose not to work for the district
   g. Connect candidates with principals in a timely and organized manner

10. Establish a career path for teacher aides and paraprofessionals to become certified teachers.
11. Document standard operating procedures and work flows in desk manuals and quick reference guides that can be used by staff and customers.

12. Develop processes and staff training programs that focus on compliance issues.

13. Outsource the Employee Assistance Program with an appropriate firewall to ensure employee confidence in the program’s confidentiality.

14. Establish an on-going training and professional development program for new and continuing HR staff.

B. Financial Services

The Seattle Public Schools’ (SPS) Finance Services Division is headed by the Chief Financial/Operations Officer (CFOO), who has four direct reports in the financial area: the Budget Manager; the Accounting Manager; the Warehouse, Mail, Purchasing, and Contracts Manager; and the Internal Auditor. The following is a brief description of the areas under these positions.

- The Budget Department is staffed with 12 positions including the Manager, a Supervisor, and 10 Analysts. The department is responsible for—
  - Preparing, publishing, and monitoring the General Fund and Capital Budgets
  - Filing state budget reports with the Office of Superintendent of Public Instruction
  - Providing schools and central administrative units with technical budget assistance
  - Providing analyses and projections of district expenditures and revenues.

- The Accounting Services Department is organized into four units, including—
  - The General Ledger/Reporting Unit, which is staffed with seven positions, including a supervisor.
  - The Grants Unit, which includes four analysts and a supervisor
  - Accounts Payable, which has 10 positions, seven of which are clerical, two of which provide administrative services for contracts, one which monitors the associated student body funds, and a supervisor.

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9 The CFOO also has five non-financial departments reporting to him; Facilities, Technology Services, Enrollment and Planning, Strategic Alignment, and School Support Services.
Review of Human Resources, Finance, and Information Technology of the Seattle Public Schools

- The Payroll Accounting Unit which has two positions10

The Accounting Services Department is also responsible for—

- Depositing cash receipts and recording district revenues
- Investing available cash resources
- Issuing payments to suppliers in receipt of goods and services
- Recording district expenditures in accordance with state and federal requirements
- Providing formal fiscal reporting and related financial information to district managers, the public, and state and federal agencies
- Acting as district liaison to the Washington State Auditors Office
- Acting as custodian of district financial records and steward of district assets

- The Warehouse/Mail, Purchasing, and Contracts Department, which consists of—

  - The Purchasing Unit, comprised of a manager and four buyers, which is responsible for the procurement of non-warehouse materials, supplies and equipment
  - The Warehouse Unit, consisting of a coordinator, ten drivers, four warehousers, three expeditors, and a warehouse buyer, which is responsible for the acquisition, receipt, storage, and distribution of approximately 2,000 warehoused items
  - The Mail Unit with two mail clerks that sorts and prepares mail for internal distribution
  - A Contracts Manager and a Contracts Supervisor who coordinate master contracts for goods and services as well as capital contracts

- The Internal Audit Office, which is comprised of a single position and is responsible for performing the district’s internal audit function and acts as a district liaison to the Washington State Auditors Office

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10 Payroll related staffs are also part of the Human Resources and Technology Services organizations.
Findings and Observations

The Council’s Strategic Support Team’s findings and observations in financial services are organized into four general areas: Commendations, Leadership and Management, Organization, and Operations.

Commendations

- The district maintains reasonable fund balances, has a strong cash position, and is in generally good financial health.

- The Finance Services Division prepares a long-term (five-year) financial forecast to anticipate trends and to facilitate planning.

- The school board has established a three member Finance Committee, which—
  - Monitors the financial matters of the district
  - Approves the budget development timelines
  - Provides oversight of the budget development process
  - Conducts budget based program reviews
  - Proposes financial policy to the full board.

- The Purchasing Unit conducts customer satisfaction surveys and maintains a strong customer focus.

Leadership and Management

- Although a systemwide vision and strategic plan is being developed, there is no interim focus on near-term priorities that the finance staff can use to guide the development of programs and services through the budget process.

- There is little use of data to measure the district’s financial performance. For example, the team saw no evidence that any of the following basic data elements were being used—
  - Periodic analysis of the percentage of actual expenditures to budgeted expectations
  - Analysis of deficit spending trends and ending balances
Allocation of one-time resources

Percentage of grant funds expended

Percentage of prior year audit findings eliminated

Discounts taken and discounts lost

Stock-turn ratios

Percentage of spending subject to competitive thresholds that is not competed

Cost avoidance/savings from competed procurements

Percentage of dollars under strategically sourced contracts vs. individual buys

Most of the work of financial staff members is transactional in nature, rather than being analytic and strategic.

There is a general lack of accountability within the Finance Services Division. For example—

There is no defined ownership for position control or accountability to ensure positions are budgeted prior to being filled.

There appear to be no consequences for failure to meet performance standards, comply with purchasing policies, or keep spending within authorized budgets.

The culture appears to be one in which “it is easier to ask for forgiveness than to ask for permission.”

There has been excessive turnover in the senior management of the Financial Services Division. Fortunately, the division’s middle management has been relatively stable and has been able to sustain the district’s financial operations.

There is a general lack of professional development and training opportunities for new and continuing employees, and limited opportunities for customers to learn financial and purchasing procedures and processes.

There are inherent weakness in the district’s systems of internal controls, including the following—
Inadequate position control (referenced above) can lead to over-hiring and over-expenditure of the budget, and combined with weak reporting systems or projections, can cause other resources (including the unreserved fund balance that may remain from the prior year) to be quickly consumed and weaken the stability and fiscal integrity of the district.\textsuperscript{11}

Some schools have opened unauthorized bank accounts to avoid scrutiny of Student Body Activity fund expenditures.

P-Card expenditures are not reviewed beyond the user departments.

There is no apparent budget-check process to prevent over-expenditure of line item budgets.

- The district does not prepare a Consolidated Annual Financial Report (CAFR), which typically includes Independent Auditors’ Reports (Opinion), Management Discussion and Analyses, Financial Statements, Notes to Financial Statements, Supplementary Information, Compliance Reports, and Audit Findings and Recommendations.\textsuperscript{12}

- There is inadequate interim financial reporting. For example—

  - The monthly financial reports include actual revenues and expenditures, but do not include projections for the remainder of the year that management could use to compare how the district is performing compared to the budget plan.

  - The monthly financial reports contain little explanatory narrative to guide management.

- Financial reports are not prepared for program administrators and district management on a regular basis. For example—

  - A revenues and expenditures (profit and loss) statement for the Child Nutrition Program that was requested by the team indicated that the program had a loss in FY 07 that apparently was not known by the program manager.

\textsuperscript{11} Personnel costs are a major consumer of resources in a public school system, typically accounting for 80 percent or more of the annual operating budget.

\textsuperscript{12} The Washington State Auditor conducts an annual audit of the district and issues a report on the district’s financial statements and compliance with federal laws and regulations. It is the opinion of the team that the State Auditor’s report contains only minimal financial information and, in the opinion of the team, does not conform to the Governmental Accounting Standards Board (GASB) financial reporting standards and criteria (particularly GASB Statement number 34 and possibly GASB Statements 33, 37, 38, 43 and 45\textsuperscript{12}). The team also took note that the State Auditor’s report was dated nine months after the close of the fiscal year.
because data are only run for end-of-year accounting purposes and not reported to management as a decision-making or monitoring tool.

- Activities performed within the Financial Services Division and between it and other district divisions are poorly planned, communicated, and coordinated.
  - For example, at the divisional level—
    - The buyers, particularly the lower-dollar transactional staff, do not know what the contract managers are working on.
    - Fifty percent (50%) of the Accounts Payable staff time is reportedly spent on system exceptions, including payments for purchases made outside the authorized processes.
    - Contract writers include “payment within 30-days of receipt” discounts in procurement contracts, even though Accounts Payable is unable to meet this timeline, so the district is unable to take advantage of early payment discounts.
    - Some Accounting staff reported there are no confirming\textsuperscript{13} purchase orders (POs) in the district, while another group reported that the use of confirming POs is pervasive in the Facilities Department.
  - For example, at the district level—
    - The problems associated with the 2007 implementation of the new HR/Payroll system resulted in large part from poor interdepartmental communications, planning, and coordination between the Finance Services Division, and the Technology, and Human Resources Departments.
    - Poor planning and coordination in moving the payroll staff from the Finance Services Division to the Human Resources Department; the reorganizing of the Human resources Department into Service Teams; and eliminating the Payroll Supervisor all led to the loss of technical leadership in the payroll unit.

- The district’s Internal Audit function is inadequate.
  - There is no annual audit plan based on a district risk assessment and mitigation plan.

\textsuperscript{13} Confirming purchases orders are purchase orders issued after a transaction has already taken place.
There is only one Internal Auditor position, which is currently filled by a person who is new to the system and has limited experience in managing an internal audit function in such a large and complex organization.

- The district does not have an Ethics Officer although Board Policy F11.01 III provides for an “Ethics Office.”

- The district does not have a “hot line” for reporting inappropriate spending activities or financial transactions.

- The procurement function has the potential for risking loss and abuse because—
  - The school board’s approval level for procurement at $250,000 is very high for a district of this size.
  - School board approval for procurement transactions, reportedly, can take two months to complete.
  - The procurement function has no performance measurement tracking system.

### Organization

- There is no single point of leadership or technical expertise for the payroll function because tasks, with no clearly defined roles and responsibilities, have been assigned to the Financial Services Division, Technology, and Human Resources Departments. This structure has the potential for ineffective and inefficient services supporting payroll and position control.

- The roles, responsibilities, and authority for providing financial services and ensuring adequate internal control are unclear because financial positions have been assigned to various organizational units outside the Financial Services Division, e.g., the Learning and Teaching Division and the Facilities, Food Services, and the Technology Departments. The disbursement of resources outside the Finance Services Division dilutes the district’s ability to conduct enterprise-wide assessments and analysis and has the potential for ineffective and inefficient services supporting financial-services control.

- The Chief Financial and Operations Officer (CFOO) has four financial and five non-financial direct reports.\(^\text{14}\) (See earlier section.) This wide span of control puts the district at risk of inadequate attention to important fiscal matters.

\(^\text{14}\) The CFOO’s five non-financial direct reports include: Facilities, Technology Services, Enrollment and Planning, Strategic Alignment, and School Support Services.
Operations

- The financial functions set forth by School Board Policies are not adequately supported by uniform workflows and process documentation, administrative regulations, standard operating procedures and guides, or desk manuals. For example—
  - Although the district follows state law regarding the formal bidding threshold for procurement, the district-established thresholds for informal bids and quotes are not documented. In other cases, the procurement process is bypassed altogether through direct purchases, e.g., some Facilities Department purchases.
  - There is no written process to determine economic re-order points and quantities for items stocked in the district warehouses.
  - There is no documented process to consolidate multiple small purchases into larger, more economical purchase orders.

- There are deficiencies in the budget development process that include—
  - The budget development process is not driven by or connected to a district strategic plan.
  - A formal budget development process has not been defined by management.
  - The process is not driven by a strategically driven performance-based process, but rather is based on prior allocations.
  - The budget development process does not consider salary lapses (vacancies and turnover).
  - The process does not price-out the cost of salary-schedule step and column increases.
  - The budget development process does not identify instances when one-time revenues are used to support ongoing costs.
  - The process does not have guidelines for using balances or the level of reserves.
  - There is no budget development calendar.
  - There have been inadequate system refinements, senior management involvement and support, and user training to fully maximize FlexView as a budget tool.
The Finance Services Division underutilizes the functionalities of the district’s computer systems with the following consequences—

- Accounting staff are not able to easily reconcile payroll expenditures to the General Ledger because of the complexity in generating reports.
- Staff cannot reconcile the warrants issued against the payroll bank account because the new HR/Payroll system has not produced the required information.
- The district is at risk of under- or over-spending special funds because of the lack of data on grant expenditures.
- The ability to properly project expenditures is limited by the inability to establish salary encumbrances.
- Capital programs are unable to set up multi-year encumbrances.
- The inability of the district’s computer systems’ to accommodate hierarchical controls denies access to the information that is required by budget and accounting staff to do their jobs.
- The staff’s inability to update the on-line catalog has undermined the district’s “Business to Business” procurement system.
- There has been a continued reliance on paper transactions because the district’s on-line receiving function is not fully utilized.

There are significant Accounts Payable issues that include—

- An Accounts Payable aging report of unpaid, outstanding invoices is not being prepared.
- Payment discounts are being missed and late fees are being assessed because the district fails to make payments on a timely basis.
- Some potentially inappropriate expenditures by schools and in the capital programs are not being adequately investigated or acted upon.

The district lacks a treasury function to direct how funds that are required by state law to be deposited with the County Treasurer are invested. The district’s lack of attention to this responsibility resulted in over $300 million in bond proceeds not being invested in a longer term investment program.

There are a number of problematic areas in the procurement system, including—
There is no formal process (outside of the capital program) that encourages small, minority, and female owned businesses to do business with the district.

The Board approval threshold for reviewing and approving purchase contracts at $250,000 or more is higher than comparably sized districts.

The contract/purchase order administrative signature level appears to be high.

The district’s protracted procurement process means that a purchase that requires school board approval will take at least two months.

The district procurement team does not pursue direct shipments, value added, or strategic sourcing opportunities.\(^\text{15}\)

- The process of accounting for furniture, fixtures, and equipment (FF&E) has several notable weaknesses, including—
  - A single person is responsible for tracking all of the district’s FF&E assets.
  - The assets of each school are only accounted for once every three years because the physical count is conducted on a rotating-cycle basis.
  - Differences between district asset records and physical counts are sent to schools for investigation, although only one in four schools responds.
  - The inventory of FF&E is maintained in a DOS-based application that is not part of the district’s accounting system.
  - There is no process to account for FF&E asset shrinkage.

**Recommendations**

The Council’s Strategic Support Team has the following recommendation based on the findings outlined above.

1. Accelerate the development, communication, and implementation of a districtwide strategic plan that includes goals, objectives, and measurable performance indicators. The strategic plan should drive the development of a priority-based budget.

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\(^{15}\) Strategic Sourcing is defined as a disciplined, systematic process for reducing the total costs of externally purchased materials, products, and services while maintaining or improving levels of quality and service. Strategic Sourcing evaluates the total cost of ownership, the consolidation of purchasing power, standardization, the alignment of business processes, and improved teamwork and cross-functional collaboration.
2. Create a strategic vision and business plan for the Finance Services Division that includes goals, objectives, and performance measures that tie into the district-wide plan.

3. Develop and implement a systemwide performance management plan that measures performance using key indicators to monitor efficiency or effectiveness of progress toward attaining strategic plan goals and objectives. As part of the effort—
   a. Conduct formative performance/risk assessments during the year and summative assessments at year-end, with remedial action taken when indicated to mitigate risk or to improve performance.
   b. Empower and hold staff accountable for their individual and team performance against agreed upon measures.

4. Create a district support team organization under the leadership of a Chief Operating Officer with executives responsible for each of the following areas—
   a. Finance department (including payroll\footnote{16})
   b. Department of Technology
   c. Facilities Department
   d. Human Resources
   e. School Support Services.

5. Create and empower cross-functional teams to address the critical issues facing the division. Specifically—
   a. Develop an immediate remediation plan (with specific priorities) to address the problem of achieving full functionality of the district’s Enterprise-wide Resource Planning (ERP) computer system. Ensure the allocation of adequate and dedicated resources to this effort.
   b. Conduct a risk assessment and develop a mitigation plan to address the district’s internal control weaknesses, including the lack of a position-control system.

6. Engage an independent CPA firm to conduct a comprehensive annual audit and to assist the Finance Services Division in the preparation of a Consolidated Annual Financial Report (CAFR) in accordance with the Governmental Accounting Standards Board’s (GASB) financial reporting standards and criteria.

\footnote{16} Payroll staff in the various departments should be consolidated within the finance department under the leadership of a technically competent payroll manager. Consideration should also be given to consolidating the financial personnel currently assigned to other areas of the district’s organization.
7. Establish reporting standards for the district’s interim financial reports that include—
   a. Reporting by fund, as well as by major programs within the various funds (e.g., the Child Nutrition Program)
   b. Reporting of year-to-date actual revenues and expenditures
   c. Projection of revenues and expenditures for the remainder of the year
   d. Comparison of projected revenue and expenditures with budgeted amounts
   e. Explanatory notes and comments on any material or significant variances between projected outcomes and the budget.
   f. Establishment of other monthly financial management reports for use as decision-making tools during the year.

8. Strengthen the district’s Internal Audit function by augmenting the office with additional experienced professional personnel.

9. Establish an Audit Committee composed of board members and community leaders with experience in the accounting and auditing field, and empowered with the following responsibilities—
   a. Reviewing and approving the Internal Auditor’s annual work plan based on a risk assessment of district operations
   b. Reviewing and commenting on all internal and external audit reports
   c. Reviewing and commenting on all interim and annual financial reports.

10. Establish guidelines for district budget development that includes—
    a. A budget-development calendar
    b. Direct connection of the budget with the strategic plan
    c. Identification of significant one-time revenues and expenditures
    d. Guidelines regarding the use of balances and reserves
    e. Costing out of all significant policy and salary issues
    f. Staffing allocations and other formula-driven allotments.
11. Establish, publish, and communicate to staff and customers all departmental standard operating procedures and work flows and document them in desk manuals and quick reference guides.

12. Establish an ongoing training and professional development program in the Finance Services Division for new and continuing employees as well as for customers.

13. Take a more active role in the management of the investment of district funds held by the County Treasurer.

14. Adopt modern procurement strategies and techniques, including just-in-time supply chain management, strategic sourcing, and value added buying.

C. Department of Technology Services

The Department of Technology (DoTS) reports to the Chief Financial Officer. The DoTS is headed by a Director, who has nine Manager positions, a Supervisor, and a Senior Program Consultant as direct reports. The DoTS’s budget for the fiscal year 2007 (ended 8/31/07) was $20.4 million. This budget consisted of $8.3 million (or 40 percent) from the General Fund and $12.1 million (or 60 percent) from the Capital Projects Fund. The total budget supported a staff of approximately 101 full time equivalents (FTEs).

The major operating units in the DoTS include the following—

- Computer and Network Operations is responsible for the operation, administration, and security of all central computer systems and data networks.

- Networks and Telecommunications manages, operates, and maintains the district's wide-area network, and coordinates, installs, and operates the telecommunication systems and services (including telephones, voice mail, cellular phones, paging, leased lines and long distance services).

- Systems and Programming maintains and develops the district’s enterprise computer application systems, including student information, human resources/payroll, financial, student assignment and transportation systems. The unit also works with the Communications Department to maintain the district website.

- Technology Training and Support Center provides technology training and support to school and central office staff, a TechLine help-desk call center, and support for system applications.

- Instructional Technology provides professional development for teachers to infuse technology into classroom instruction.
On-Site Technology Support provides on-site support at schools and in central offices for workstations, servers, network systems and software/hardware installations.

Library Media Services and Instructional Broadcast Center works directly with school principals and librarians on library initiatives, and provides cataloging and support for library automation software and computers. The Instructional Broadcast Center television studio develops and broadcasts programming about the school district, professional development, and instruction.

Legacy Migration Project (RAIN-Relational Academic Information) is completing the implementation of the new transportation system (VersaTrans), developing a new resource plan, and completing the migration off the VAX computer systems.

Findings and Observations

The Council’s Strategic Support Team findings and observations in the area of technology are organized into four general areas: Commendations, Leadership and Management, Organization, and Operations and Technical.

**Commendations**

- The district has a robust Wide Area Network (WAN) that supports various initiatives.
- DoTS staff has a “can-do” attitude reflecting a belief that technology can help resolve district problems and reduce the time and effort required to perform core district instructional and administrative functions.
- The production of employee paychecks on the first payday after going live with a new human resource/payroll system was due to the extraordinary efforts of DoTS and user department staff.
- DoTS maintains a modern well-equipped data center facility with good physical security.

**Leadership and Management**

- The high degree of turnover of DoTS Directors has resulted in organizational instability and inconsistent leadership.
- Prior DoTS Directors appeared to lack both the skills to work with district leadership on its strategic direction and to direct on-going department operations.
• DOTS lacks a formal process to identify, analyze, address or manage its human resource needs, such as—
  o High employee turnover and 10-12 percent vacancy rates
  o Identifying new skill-set requirements
  o Training and professional development needs
  o Career paths and succession planning
  o Performance measurement

• The district does not have a strategic vision for the role technology should play in improving academic achievement or operational efficiency.

• Although the major units have annual project goals, DoTS as a whole does not have an overall business plan with established benchmarks against which performance can be measured.

• Technology plans and initiatives are not aligned or coordinated with academic plans and instructional strategies to support student achievement.

• There is no Information Technology (IT) governance structure or steering committee charged with prioritizing projects, allocating resources, or defining departmental responsibilities and relationships.

• A thorough process for evaluating the business case for technology proposals is not always used before projects are initiated.

• Project decisions are made without regard to either lifecycle costs or how projects fit into an overall districtwide information-management strategy or systems architecture.

• DoTS makes systems decisions without client input and clients are making systems decisions without DoTS input because the decision process is not always coordinated. For example—
  o The recent HR/Payroll system upgrade was driven by the DoTS without the full engagement of all stakeholders.
  o The school nurses hired a programmer and created their own stand-alone system to track student health records. The district’s student information
system has a health module that could have been utilized in lieu of developing a new health system.

- Special Education has created its own system to manage Individual Educational Plans (IEPs).

- The Learning and Teaching Division is building a parent portal – the Source – rather than using the functionality that is available in the district’s existing eSIS (electronic Student Information System).

- The DoTS does not use new system initiatives as opportunities to help user departments design improved business processes, particularly in the HR functional areas.

**DoTS** funding is structurally imbalanced. A funding structure that designates 60 percent of its resources from the Capital Projects budget for new systems development and 40 percent of its resources from the General Fund for systems maintenance and all other IT functions has the following consequences—

- The funding structure and the resulting staffing of projects create a bias to build rather than to buy systems.

- Systems development creates demand for additional resources to maintain the systems as they are implemented.

- The funding structure encourages the purchase of hardware without regarding the human resources required to maintain it.

**Issues related to data security, ownership, integrity and accuracy** are not addressed. For example—

- There is no single authoritative source of student data because of the proliferation of “information islands” outside the electronic student information system (eSIS).

**There is poor communication and coordination both within the DoTS and between the DoTS and its customers.** For example—

- The team heard that a key developer of the legacy system (VAX) was not involved in planning or migrating applications off the VAX.

- There is no formal communication process to provide monthly updates to the school board, staff, stakeholders, or parents regarding the status of major DoTS projects.
There is limited use of the district’s website to provide training; post training documents so users can upgrade their skills; or notify users regarding changes to applications.

There is no mechanism in place so users and subject matter experts can provide feedback to the developers of district applications.

**Organization**

- The DoTS organization has suboptimal spans of control. For example—
  - While the Director has eleven direct reports and some Managers have up to 22 direct reports, other Managers have no supervisory responsibilities.

- Based on a limited comparison of DoTS’s staffing levels with peer districts it appears the department is not under-staffed or under-resourced. (See Exhibit 1.)

### Exhibit 1. Comparison of Peer School Districts

<table>
<thead>
<tr>
<th>School District</th>
<th>Student Population</th>
<th># of IT Staff</th>
<th>Students Per IT Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seattle</td>
<td>46,000</td>
<td>101</td>
<td>455</td>
</tr>
<tr>
<td>Chicago</td>
<td>410,000</td>
<td>230</td>
<td>1,783</td>
</tr>
<tr>
<td>Orlando</td>
<td>179,000</td>
<td>106</td>
<td>1,689</td>
</tr>
<tr>
<td>San Diego</td>
<td>138,000</td>
<td>120</td>
<td>1,150</td>
</tr>
<tr>
<td>Boston</td>
<td>58,000</td>
<td>86</td>
<td>674</td>
</tr>
<tr>
<td>Guilford County</td>
<td>73,000</td>
<td>75</td>
<td>973</td>
</tr>
</tbody>
</table>

- Insufficient clarity about departmental, unit, and individual roles and responsibilities has resulted in redundancies, confusion, and a lack of accountability. For example—
  - There is no single point of leadership or technical expertise for the payroll function because payroll tasks have been dispersed to at least three different departments (i.e., the HR Department’s Service Teams, the Finance Services Department, and the DoTS).
  - IT instructional support functions exist in both the DoTS and the Learning and Teaching Division.
  - The DoTS has units designated as Classroom Technology, Instructional Technology, and Educational Technology.
• The DoTS does not have a Project Management Office (PMO) or a project management methodology, a situation that has led to poor coordination and execution of project management and control.\(^{17}\)

**Operations and Technical**

• The DoTS has not taken advantage of value-added procurements or strategic sourcing opportunities. For example—
  
  o The DoTS employs a cadre of technicians who perform tasks (e.g., delivering, unpacking, setting up, imaging, and web enabling new computers, etc.) that could be incorporated into procurement contracts at less cost and better service.
  
  o Having DoT technicians perform work on computers that is covered by warranty may not be cost effective.
  
  o Free product training and related technical briefings available from vendors are not maximized by DoT.
  
  o Standard products are not always purchased with long term contracts to take maximum advantage of volume pricing.

• It was unclear to the team whether the federal E-Rate program is being maximized or adequately leveraged.

• There is no enterprise-wide information technology architecture that defines the appropriate interrelationship among business functions, information systems, and technology functions, and that serves as a blueprint for decisions related to IT investments.

• The district’s mission critical enrollment functions are at risk because of the age and complexity of its legacy environment.
  
  o While staff members of the DoTS are attempting to migrate applications off the antiquated VAX\(^{18}\) technology, progress has been slow because of the fixation on re-writing existing applications rather than buying new ones,

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\(^{17}\) A PMO can provide the structure needed to standardize project management methods and change management practices, facilitate IT project portfolio management, and determine methodologies for repeatable success. For additional information see: “Why You Need a Project Management Office”, CIO.com, 2007

\(^{18}\) The first VAX/VMS systems were introduced in 1977. In the ensuing years, many major technical advances were made to this product line. While some value can be drawn from these aging systems, users are moving to industry-standard, lower-cost solutions. Owners of existing VAX production systems are finding it increasingly difficult to obtain replacement components and are experiencing increased service costs
leveraging modules the district already owns, and revamping business processes.

- Enhancements continue to be developed for the VAX system at the same time.

- The district maintains two student information systems with overlapping functions but running on dissimilar systems. The eSIS system is not fully utilized, while the internally developed student assignment system continues to be expanded even though it is in a critically obsolete VAX environment.

- The Schools Interoperability Framework (SIF)\(^{19}\) is not used as an interface between the eSIS system and any other SIF-compliant commercial applications. Furthermore, the eSIS software is two versions behind in its updating.

- Although the district does back up its data, there is no comprehensive disaster recovery or business-continuity plan that focuses on mission-critical activities related to finance, human resources/payroll, and student information systems that are dependent on computer applications.

- DoTS does not use the Help Desk HEAT trouble-ticket system to manage workloads, assign staff or analyze the work that is performed. For example—
  - DoTS was unable to estimate how many trouble tickets were handled annually, or what a reasonable daily workload of trouble tickets should be for network analysts.

- The DoTS technical staff does not use remote tools to manage desktops and servers located in schools and offices. This inefficiency is compounded by the placement of 200 servers at school locations and 200 servers at central offices.

- The district has a weak Internet Acceptable-Use policy that may not be compliant with federal guidelines\(^{20}\).

\(^{19}\) SIF is an industry initiative that enables diverse applications to interact and share data through the use of uniform data definitions. As of March 2007, SIF is estimated to have been used in more than 48 states and six countries, supporting five million students.

\(^{20}\) The Children’s Internet Protection Act (CIPA) requires –

- Schools and libraries subject to CIPA may not receive the discounts offered by the E-Rate program unless they certify that they have an Internet safety policy and technology protection measures in place. An Internet safety policy must include technology protection measures to block or filter Internet access to pictures that: (a) are obscene, (b) are child pornography, or (c) are harmful to minors, for computers that are accessed by minors.

- Schools subject to CIPA are required to adopt and enforce a policy to monitor online activities of minors; and

- Schools and libraries subject to CIPA are required to adopt and implement a policy addressing: (a) access by minors to inappropriate matter on the Internet; (b) the safety and security of minors when using electronic mail, chat rooms, and other forms of direct electronic communications; (c)
• There is no web-content governance committee that sets guidelines and formats for schools to post content on the web.

• There is no hardware-replacement cycle, so decisions on computer replacements are driven by funds availability rather than needs analyses.

• There are no standards for PC systems, resulting in inconsistent hardware and software versions and products that are difficult to support.

• Little has been done to define or monitor the role of the consultants who have been engaged to assist with systems development and implementation. As one consultant put it, “I report to myself.”

• There is no voice/telecommunication strategy, so plans for the use of a fiber network for voice communications are undefined.

• A review of the Support Logs for the HR/Payroll system indicated a significant number of high priority and critical issues that are still being identified some five months after implementation of the new system. (For example, the position control module has not been implemented.)

Recommendations

The team concluded that the district should establish a moratorium on new projects until such time as the first two recommendations below have been implemented.

1. Contract with an external third-party to handle talent management issues for DoTS, including—
   a. An executive search for a professional Chief Information Officer (CIO)
   b. An analysis of employee turnover and a market compensation survey
   c. An analysis of job descriptions versus work actually performed
   d. Development of recruitment and retention strategies
   e. Creation of a training and professional development program for DoTS staff
   f. Engineering of performance measurements for staff.

unauthorized access, including so-called “hacking,” and other unlawful activities by minors online; (d) unauthorized disclosure, use, and dissemination of personal information regarding minors; and (e) restricting minors’ access to materials harmful to them.
2. Establish an executive IT governance structure and charge it with—

   a. Defining organizational roles and relationships

   b. Establishing priorities and resource allocations

   c. Developing and overseeing enterprise architecture to guide acquisition, development, and interfacing of systems

   d. Managing the portfolio of IT applications, projects, and resources

   e. Addressing issues of data security, ownership, integrity, and accuracy and, in collaboration with academic leaders, carrying out a student data-quality improvement program

   f. Ensuring that project proposals consider lifecycle cost and how projects fit into the district’s overall information management strategy and systems architecture

   g. Adopting the practice of procuring commercial applications whenever practical in lieu of developing new applications internally

   h. Establishing an Internet Acceptable Use policy in compliance with federal regulations, as well as guidelines on web content for the district and school sites.

3. Create an IT organizational structure based on the core functions of the DoTS, including the addition of a Project Management Office. (See Exhibit 2 for a proposed structure for a reconstituted DoTS.) The new organization should reflect reasonable and consistent spans of control and supervision for the CIO and managers/supervisors.

   **Exhibit 2. Sample Functional Organization Chart**

   ![Sample Functional Organization Chart](image-url)

   - **CIO**
   - **PMO**
   - **Director Support Services**
   - **Director Application Development**
   - **Director Operations**
   - **Manager Instructional Technology**
4. Develop a comprehensive DoTS strategic business plan that links to the district’s strategic plan and that—

   a. Defines technology’s role in improving academic achievement and operational efficiencies

   b. Sets goals, objectives, benchmarks, and measurable performance indicators for each unit within DoTS and that are periodically reviewed with staff, so targets can be adjusted as needed

   c. Establishes standards for service with formalized processes for determining customer needs and for evaluating customer satisfaction

5. Provide a balanced DoTS funding model, so there is a sustainable allocation of resources for new systems/applications development, the maintenance of production systems, and all other IT functions

6. Define standard methodologies for project management and systems development to ensure adequate training is provided to technology staff in these methodologies

7. Consolidate payroll staff in the various departments into a single payroll unit within the Finance Services Division and under the leadership of a technically competent payroll manager

8. Take advantage of value added procurements or strategic sourcing opportunities to reduce cost and improve operational efficiency

9. Re-examine the current E-Rate application process to maximize and leverage this opportunity. (Consult Council staff.)

10. Accelerate efforts to migrate off high-risk legacy systems and take steps to ensure core systems software is current.

11. Establish a comprehensive disaster recovery and business continuity plan.

12. Institute the use of currently available technology tools (e.g. remote network and desktop management tools and the Help Desk HEAT system) to address workload and staffing issues.

13. Continue efforts to consolidate the inventory of remote servers in order to improve the efficiency of the server maintenance function.

14. Establish a computer replacement program based on a needs analysis with adopted standards for all new PC equipment.
15. Create processes and procedures to monitor and evaluate the cost effectiveness of outside consultants.

16. Ensure client-department buy-in so resources will be available to support new systems implementation.

17. Provide an allocation for maintenance personnel when new hardware and software is purchased.

18. Minimize the variety of operating system platforms used because maintaining multiple technical platforms is costly and may be unnecessary.

19. Complete a business process review (clearly documenting the workflow and technical details) and re-engineer all affected functions before designing and implementing new applications.

20. Consider integrating help-desk personnel and technical-training personnel, so they become application problem solvers and are a training resource for users.
ATTACHMENT A. STRATEGIC SUPPORT TEAMS

James Beall

James Beall is the Chief Financial Officer for the Prince George’s County Public Schools. He has over 31 years of leadership experience in business and public education. Mr. Beall’s experience includes approximately 11 years of service as the chief financial executive for Prince George’s County Public Schools, for many years the largest public school system in Maryland and among the 20 largest school systems in the country. As CFO, he leads and supervises the departments of Budget and Management Services; Financial Services (Accounting and Financial Reporting, Accounts Payable, Cash Management and Risk Management); Payroll Services; Purchasing and Supply Services; Fiscal Compliance and Quality Assurance; and at other times in the past, Internal Audit, Management Information and Technology Services, and Grants Development. Mr. Beall also served as the Project Manager for the school system’s integrated ERP implementation replacing outdated legacy systems supporting budgeting, financial, and human resources functions. He holds a Bachelor of Science degree with a major in Accounting from the University of Maryland in College Park and is a Certified Public Accountant, holding an active Maryland license.

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 hundreds of requests for management information; and has developed and maintains a Web-based information 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 Ed. D. and M.A. degrees in administration from The Catholic University of America; a B.A. degree in political science from Ohio Wesleyan University; and has done advanced graduate work in political science at Syracuse University and the State Universities of New York.

Mike Casey

Michael Casey is currently the Executive Director of Information Technology for San Diego City Schools (SDCS). SDCS is the seventh largest urban school district in the U.S. with a student population of 130,000, an operating budget of $1.1 billion, and 20,000 employees. Mr. Casey has 25 years experience with the school district as a teacher, technology resource teacher, Program Manager of Educational Technology, and Project Manager for ERP implementation (PeopleSoft HCM, FI, SIS and SpEd). Mr. Casey has degrees in Chemistry, Mathematics and Physics, as well as a Masters degree in Administration. Mike is a member of Computer Using Educators, California League of
Middle Schools, California League of High Schools, International Society for Technology in Education (ISTE), and the California Network Implementation Committee representing Southern California. Mr. Casey has been a speaker at numerous conferences throughout his career and was recently the Keynote Speaker at the Cisco Annual Conference (2005). Mike’s other teaching experiences include: Instructor San Diego State University and University of California San Diego Extension College.

**Ann Chan**

Ann Chan is the Director of Human Resources Operations with the Chicago Public Schools (CPS). In this role, Ann manages and supports the strategic alignment of all human resources functions to core CPS goals and serves as liaison between the Department of Human Resources and all other CPS units. Most recently, she spearheaded the requirement-gathering phase of the successful replacement of a 35-year-old, homegrown, customized database system with a state-of-the-art Human Capital Management System, PeopleSoft. With over 15 years of experience in the field of Human Resources, Ann is well-versed in the various stages of an employee’s career cycle and human resources services. Prior to coming to CPS, Ann worked for the Sheraton Hotel chain in Chicago and the National Association of Independent Insurers, covering all functions of human resources from hiring to benefit plans to employee relations. At the Sheraton, she was responsible for the staffing of a brand new 1,209 room Sheraton Hotel. Ann received her degree in Psychology from the University of Illinois in Champaign and is a member of the Society for Human Resources Management. In addition to her on-the-job experience, Ann brings a strong commitment to high-quality, professional service to the CPS, where she has established a solid reputation for helping administrators, teachers, and education support personnel optimize their time and efforts in providing students with the best education possible.

**Russell Doupnik**

Russell Doupnik is the Executive Director, Information Technology, for the Charleston County School District in South Carolina. He directs the provision of data, video, voice, and communications systems for the academic and business functions of the district, which has 43,000 students and 6,500 staff. Before joining the district in 2004, Mr. Doupnik served as the Deputy Chief Information Officer for the state of Maryland. There he led an enterprise-architecture project covering 74 agencies and 74,000 employees; established enterprise technology security and disaster recovery programs; and oversaw contract management and project management for major technology projects. Prior to assuming that post Russ Doupnik was chief information officer for two large urban counties in Maryland. He started his career in finance and received an MBA (finance) from the University of Baltimore and a BA from Washington College in Maryland.

**Michael Eugene**

Michael Eugene is the Business Manager for the Los Angeles Unified School District. In that capacity he manages Procurement/Supply Chain, Warehouse/distribution,
Transportation, Food Services and various administrative operations. Prior to joining LAUSD, Mr. Eugene served as the Chief Operating Officer for the Cleveland Metropolitan School District. Before coming to public education, Mr. Eugene was a management consultant in the private and not-for-profit sectors specializing in performance measurement, benchmarking, and public budgeting. Mr. Eugene holds a master’s degree in public administration.

Richard Frazier

Richard Frazier is the former General Manager, ERP Systems, for the Houston Independent School District (HISD). Mr. Frazier worked for the district for 35 years. In 1999 he was assigned the duty of project manager of the district’s SAP implementation (financial, procurement, funds management, accounts receivable and payable, fleet management, maintenance tracking, and warehouse and asset management system). Later, as General Manager, ERP systems, Mr. Frazier was responsible for both the SAP and PeopleSoft (HR/Payroll) systems. In this capacity, he was responsible for all aspects of managing the utilization of the two systems throughout the district. In 2005, Mr. Frazier was given the responsibility of implementing a student information system across the district. Under his leadership, the system was implemented in less than a year, encompassing 307 schools, 15,000 teachers, 2000 other district personnel, and 210,000 students. Prior to these assignments, Mr. Frazier served as Executive Director of Resource and Systems Management, Director of Alternative Schools and Programs, Coordinator of the High School for Engineering Professions, and teacher. He received his bachelor’s degree from the University of St. Thomas (Houston) in mathematics and science, and his master’s degree from Sam Houston State University in school administration.

Kenneth Gotsch

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

Tomás Hanna

Tomás Hanna is currently the Deputy Superintendent of Operations for the Providence School Department. Under the leadership of Mayor David Cicilline and Superintendent
Dr. Donnie W. Evans, Mr. Hanna has been charged with oversight of the following areas: human resources and labor relations, school operations (athletics, climate, security, and emergency preparedness), student registration, student affairs (disciplinary matters), transportation, and food services. Prior to joining the Providence School Department, Mr. Hanna served as the Senior Vice President of Human Resources for the Philadelphia Public Schools. Paul Vallas, CEO of the Philadelphia Public Schools, tapped the former principal of Kensington High School in August of 2002 to lead the district’s efforts in the area of teacher recruitment and retention and expanded his duties to leading the entire HR operation in December, 2004. Mr. Vallas charged Mr. Hanna with streamlining the hiring process, improving services to new teacher candidates, providing more effective customer service to all the District’s 25,000 employees, and developing more collegial relationships with the District’s 11 labor unions.

Barbara Jenkins

Dr. Jenkins currently serves as Chief of Staff for Orange County Public Schools in Orlando, Florida. As a cabinet member of large urban district with over 24,000 staff members serving 178,000 students, she serves as the superintendent’s designee, oversees Strategic Planning, Community Relations, Legislative, Human Resources, Labor Relations, and Community Relations Departments. From 1998-2005 she was the Assistant Superintendent for Human Resources in the Charlotte-Mecklenburg Schools in Charlotte, North Carolina, where she was responsible for Employee Relations, Licensure, Benefits, Information Systems, Compensation and Employment. CMS is an urban district with 14,000 staff members serving 120,000 students. She previously served as Senior Director for Elementary Education in Orange County, where she was responsible for the supervision of principals and schools. Her undergraduate degrees and doctorate were received from the University of Central Florida. She is a fellow of the Broad Superintendents Academy.

Ascencion Juarez

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

**David W. Koch**

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

**William Kowba**

**William Kowba** is the Chief Financial Officer of the San Diego Unified School District (SDUSD). At the time of this report he was also acting Chief Operating Officer and Interim Superintendent of SDUSD.

**Wendy Macy**

**Wendy Macy** is the Personnel Director of the Personnel Commission of the Los Angeles Unified School District (LAUSD). The Personnel Commission is an autonomous merit-based agency that provides Human Resources services for the 40,000 classified employees of the LAUSD. She has 16 years of human resources, legal and risk management experience. Since 2001, she has also been assigned to the Office of General Counsel and the Office of Chief Operating Officer, and was involved in numerous business and operational functions, including the creation of a risk management department. Wendy holds a bachelor’s degree in History and Psychology, magna cum laude, from Harvard University and a juris doctorate, cum laude from Harvard Law School. Wendy is admitted to practice in federal and state courts in California and Pennsylvania. She has been certified as a Senior Professional in Human Resources. She currently serves on the External Affairs Committee of the national Risk and Insurance Management Society and on the Board of the Los Angeles Chapter of the Risk and Insurance Management Society. She is also on the Board of the California Health Care Coalition. She is a member of numerous other legal and human resources organizations, including the Society for Human Resources Management, the International Public Management Association for Human Resources, the California Schools Personnel...
Kimberly Rice

Kimberly Rice is the Chief Information Officer for the Boston Public Schools. She leads the Office of Instructional and Information Technology (OIIT), which is responsible for Network & Infrastructure, Budget & Procurement of Technology, Application Development, Data & Information, instructional & Assistive Technology, School & User Support, Library & Media Centers, Program Management, and Repairs. Before coming to BPS, Ms. Rice worked as a technical business analyst for supporting web-based application development. She formerly worked as Director of Strategic Planning for Information Services at the Massachusetts Department of Education. Ms. Rice was the data architect on the Massachusetts Virtual Education Space (VES) design team, now MassONE, and later became Executive Director of the statewide VES Educational Collaborative. Her career began in the classroom, teaching fourth grade and serving as the Curriculum Coordinator for K-5 elementary Science and Engineering Technology. Ms. Rice has recently been honored as a finalist for EduStat CIO of the Year award in 2007 and has been awarded with Technology & Learning’s 2006 Leader of the Year award.

Robert W. Runcie

Robert Runcie is the Chief Information Officer for the Board of Education of the City of Chicago. Prior to joining the Chicago Public Schools’ Office of Technology Services in May 2003, he served for seven years as the president of Advanced Data Concepts, a Chicago-based management consulting and technology services company. He has also worked with large technology integration companies including Computer Sciences Corporation and Andersen (now Accenture). In his current position, Mr. Runcie has positioned information technology to be a major player in building the future of education at the Chicago Public Schools. He has created a vision for the Office of Technology Services to serve as a catalyst in transforming the business of education. Mr. Runcie graduated from Northwestern University’s Kellogg School of Management and Harvard University, from which he received a Bachelor of Arts degree in economics.

Sue Wybraniec

Sue Wybraniec is the Executive Director of Human Resources for the Tucson Unified School District. Prior to her service at TUSD, she served in various capacities at Maricopa County in Phoenix, AZ and as HR Director participated in the Government Performance Project, Rating the Counties, a program of Governing Magazine. Her early career was spent working with YWCAs throughout the country and finally providing management consulting services to YWCAs in the western region. She has an M.B.A. and HR Certificate from Keller Graduate School of Management (DeVry University) and a B.A. from Augustana College, Rock Island, Illinois.
Terrence O. Young

Terrence O. Young is the Chief Information and Special Services Officer for the Guilford County Schools, Greensboro, North Carolina. His areas of leadership include instructional computer skills curriculum training; Career Technical Education business applications; Network Operations Center computer facility management and maintenance; student information management; communication installations, wide-area network; distance learning systems. He also provides leadership for planning, coordinating, and directing the assessment, evaluation, accountability, and research programs of the school district, and the facilitation of improved student achievement through objective measurement, analysis, evaluation and documentation. Dr. Young previously served at Associate Superintendent for the Guilford County Schools and Principal, Assistant Principal, and Coordinator of Enriched Programs for Chapel Hill Carrboro City Schools, Chapel Hill, North Carolina. Dr. Young received his Master of Arts and Bachelor of Science in Education from the City College of New York and his Doctorate of Educational Leadership in Educational Administration from the University of North Carolina at Chapel Hill.
ATTACHMENT B. DOCUMENTS REVIEWED

A. Human Resources

- Human Resources Organization Chart
- Overview – Human Resources Department, Seattle Public Schools, 11/12/07
- Matrix of HR Functions and Tasks, 11/12/07
- Human Resources Department Report, December 14, 2007
- Personnel Services, Procedures and Definitions, Effective with the 2003-2004 Fiscal Year.
- HR Managers Meeting Minutes, January 9, 2008
- Seattle Public Schools, Board Policies

B. Finance

- FY 2008 Operating Budgets, School Board Action Report, June 20, 2007
- F-195 Budget for Fiscal Year 2007-2008
- F-196 Annual Financial Statements for Fiscal Year 2006-2007
- F-196 Annual Financial Statements for Fiscal Year 2005-2006
- Budget and Excess Levy Summary, Fiscal Year 2007-2008
- Funds Availability Report 2007, 1/15/2008
- Funds Availability Report 2006, 1/15/2008
- Organization and Financing of Washington Public Schools, State Superintendent of Public Instruction, January 2006
- Washington School Finance Primer, Office of Superintendent of Public Instruction, School Apportionment and Financial Services, September, 1999
- Cutoff Dates for Fiscal Year 2006-2007, Memorandum from Director of Finance and Business Services, May 7, 2007
Personal Services Procedures and Definitions, effective with the 2003-2004 Fiscal Year
Accounting Department Month End Checklists
General Fund Cash Handling Procedures, Finance Services Division, 4/30/2007
Checking Account Procedures, undated
ASB Procedures, 8/31/07
Fixed Assets and Surplus Procedures, April 2007
Summary of Accounts Payable/Disbursements Processes, General Fund, undated
Regulations and Procedures Governing Travel, updated June 19, 2006
Budget Training – Managing Your Budget, Budget Office, 2007
Budget Training – Building a Budget, Budget Office, 2006
Policies and Procedures – Activity Based Budgeting, June 19, 2007
2007-08 Activity Based Budget Summary template
2007-08 Activity Based Budgets – Central Departments
Fiscal Year 2008-09 Decision Modeling (Flex-View)
Child Nutrition Services FY 2007, Revenue and Expenditure Report, January 2008
District organization chart, November 20, 2007
Finance Department organization chart, 2007-2008

C. Information Technology

Department of Technology (DoTS) Organization Chart
DoTSs Services and Project Goals
DoTSs Accomplishments
DoTSs Staff Roster
DoTSs Budget
DoTSS RFP List
eRate Overview
eRate Reimbursement Summary
Seattle Public Schools (SPS) Technology Plan
SPS Computer Standards
Electronic Purchasing Process B2B
Dell Premier Website
Computer Donation Policy
Network Use Agreement
SPS Use of the Internet
Internet Use – Elementary
Internet Use – Secondary
Internet Filter Override Handbook
SPS Anti-Harassment
Library Media Materials
Cyberbullying for Administrators
Instructional Technology Vision
Review of Human Resources, Finance, and Information Technology of the Seattle Public Schools

- Instructional Technology Website
- Instructional Technology Example
- Library Services Website
- Library Services Example
- Technology Use in Classrooms
- Student Learning Technology Plan
- TTASC Technology Training and Support Vision
- TTASC Technology Training and Support Website
- TTASC Technology Training and Support Training Calendar
- Techline Vision
- Techline Website
- Techline Example
- HEAT Overview
- Network Analyst Handbook Table of Contents
- Network Analyst Handbook Example
- eSIS (student information system) Quick Reference Document (QRD) Table of Contents
- eSIS QRD Example
- eSIS Just In Time (JIT) Table of Contents
- eSIS JIT Example
- SAP QRD Table of Contents
- SAP QRD Example
- WISE QRD Table of Contents
- WISE QRD Example
- Transportation QRD Table of Contents
- Transportation QRD Example
- EMail QRD Table of Contents
- EMail QRD Example
- Revised Code of Washington 28A.320.330 School funds enumerated
- Revised Code of Washington 28A.530.010 Directors may borrow money, issue bonds.
- Seattle School Board Workshop – WISE HR/Payroll Conversion, January 14, 2008
- VAX On-Call Analyst – job description
- Service Request Logs – eSIS Tasks, February 6, 2008
- System Operations Log Examples, February 6, 2008
- HR SAP Support Logs, January 2008
- Tech Line Call Summary and examples, February 6, 2008
- Sample Service Tickets from the HEAT Service Desk System, February 6, 2008
<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Location</th>
<th>Time</th>
</tr>
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<tbody>
<tr>
<td>Tuesday, January 15</td>
<td>Team Arrival</td>
<td>Vintage Hotel</td>
<td>6:15 p.m.</td>
</tr>
<tr>
<td></td>
<td>Team to Meet in Hotel Lobby</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dinner Meeting</td>
<td>Tulio Ristorante</td>
<td>6:30 p.m.</td>
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<td>Wednesday, January 16</td>
<td>Continental Breakfast</td>
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<td>7:30 - 8:00 a.m.</td>
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<tr>
<td></td>
<td>Team Interview</td>
<td>Laurie Taylor, Dir., HR Admin.</td>
<td>8:00 - 9:15 a.m.</td>
</tr>
<tr>
<td></td>
<td>Team Interviews</td>
<td>Jeannette Bliss, Mgr., HR Service Team 1</td>
<td>9:30 – 10:45 a.m.</td>
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<tr>
<td></td>
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<td>Misa Garmoe, Mgr., HR Service Team 2</td>
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<td></td>
<td></td>
<td>Tom Peterson, Interim Mgr., HR Service Team 3</td>
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<td></td>
<td></td>
<td>Gloria Morris, Mgr., HR Service Team 4</td>
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<td></td>
<td></td>
<td>Penny Peters, Interim Mgr., HR Service Team 5</td>
<td></td>
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<tr>
<td></td>
<td>Team Interviews</td>
<td>Pat Covich, Supvr., HR Specialist Team 6</td>
<td>11:00 - 12:15 p.m.</td>
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<td></td>
<td></td>
<td>Employment, Staffing, PCRs</td>
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<tr>
<td></td>
<td></td>
<td>Wanda Banta, HR Service Team 1</td>
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<td></td>
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<td>Dana DeJarnatt, HR Service Team 2</td>
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<td></td>
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<td>Margaret Porter, HR Service Team 3</td>
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<td>Leslyn Jones Petitt, HR Service Team 4</td>
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<td>Amy Valianti, HR Service Team 5</td>
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<td></td>
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<td>HR Specialist Team 6</td>
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<tr>
<td></td>
<td></td>
<td>Lois Brown, Substitute Office</td>
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<td></td>
<td></td>
<td>Sue Durant, Substitute Office</td>
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<td></td>
<td></td>
<td>Laurel Moody, Position Control</td>
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<tr>
<td></td>
<td>Team Interviews</td>
<td>Fred Stephens, Dir. Of Facilities</td>
<td>12:30 - 1:30 p.m.</td>
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<tr>
<td></td>
<td></td>
<td>Linda Sebring, Budget Director</td>
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<td>Marjorie Mills, Dir. Technology</td>
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<td></td>
<td>Working Luncheon</td>
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<td>Team Interviews</td>
<td>Payroll</td>
<td>1:30 - 2:45 p.m.</td>
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<tr>
<td></td>
<td></td>
<td>Chibike Nwabude, HR Service Team 1</td>
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</tr>
</tbody>
</table>
### Review of Human Resources, Finance, and Information Technology of the Seattle Public Schools

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>3:00 - 4:15 p.m.</td>
<td><strong>Team Interviews</strong></td>
<td>Ginny Rillo, HR Service Team 2</td>
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<tr>
<td></td>
<td></td>
<td>Salina Hemmen, HR Service Team 4</td>
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<tr>
<td></td>
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<td>Sandy Taksas, HR Service Team 5</td>
</tr>
<tr>
<td>4:15 - 5:30 p.m.</td>
<td><strong>Team Interviews</strong></td>
<td>Beverly Johnson, HR Service Team 1</td>
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<tr>
<td></td>
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<td>Mary Lou Webster, HR Service Team 1</td>
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<td></td>
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<td>Demetrice Lewis, HR Service Team 2</td>
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<td></td>
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<td>Eva Edwards, HR Service Team 3</td>
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<td></td>
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<td>Sue Means, HR Service Team 4</td>
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<td></td>
<td></td>
<td>Serena Gregerson, HR Service Team 5</td>
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<tr>
<td>Thursday, January 17</td>
<td><strong>Continental Breakfast</strong></td>
<td>HR Administrative Staff</td>
</tr>
<tr>
<td>7:30 - 8:00 a.m.</td>
<td></td>
<td>Harvey Deutsch</td>
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<tr>
<td></td>
<td></td>
<td>Penny Peters</td>
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<tr>
<td></td>
<td></td>
<td>Starla Smith</td>
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<tr>
<td></td>
<td></td>
<td>Beverly Booker</td>
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<tr>
<td></td>
<td></td>
<td>Fran Dauelsberg</td>
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<td></td>
<td></td>
<td>Patricia Miller</td>
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<tr>
<td></td>
<td></td>
<td>Stacey Murray</td>
</tr>
<tr>
<td>9:30 – 10:45 p.m.</td>
<td><strong>Team Interviews</strong></td>
<td>Ed Directors</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Gloria Mitchell, HR Service Area 1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Patrick Johnson, HR Service Area 2</td>
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<td></td>
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<td>Michelle Corker, HR Service Area 2</td>
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<td>Carla Santorno, HR Service Area 2</td>
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<td>Pat Sander, HR Service Area 3</td>
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<td>Scott Whitbeck, HR Service Area 3</td>
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<td></td>
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<td>Ruth Medsker, HR Service Area 4</td>
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<td></td>
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<td>Phil Brockman, HR Service Area 5</td>
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<td></td>
<td></td>
<td>Michael Tolley, HR Service Area 5</td>
</tr>
<tr>
<td>11:00 – 12:15 Noon</td>
<td><strong>Team Interviews</strong></td>
<td>Olga Addae, VP, SEA</td>
</tr>
<tr>
<td>12:15 - 1:00 p.m.</td>
<td><strong>Working Luncheon</strong></td>
<td>Dave Westberg, Local 609</td>
</tr>
<tr>
<td>1:00 - 2:15 p.m.</td>
<td><strong>Team Interviews</strong></td>
<td>Ron Harrell, Automotive Machinists</td>
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<tr>
<td>2:30 - 3:45 p.m.</td>
<td><strong>Team Interviews</strong></td>
<td>Lee Newgent, Building Trades</td>
</tr>
<tr>
<td>4:00 - 5:15 p.m.</td>
<td><strong>Team Interviews</strong></td>
<td>Marni Campbell, PASS President</td>
</tr>
<tr>
<td>5:30 p.m.</td>
<td>Team Discussion of Work Plan for Balance of Site Visit</td>
<td>Randomly Selected Principals</td>
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**Friday, day, October 26**

<table>
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<tr>
<th>Time</th>
<th>Event</th>
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<tr>
<td>7:00 - 7:30 a.m.</td>
<td><strong>Continental Breakfast</strong></td>
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<tr>
<td>Time</td>
<td>Event</td>
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</tr>
<tr>
<td>7:30 – 12:00 Noon.</td>
<td>Team Meeting</td>
</tr>
<tr>
<td>12:00 - 1:00 p.m.</td>
<td>Working Luncheon</td>
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<tr>
<td>1:00 p.m.</td>
<td>Adjournment &amp; Departures</td>
</tr>
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</table>
### Finance

**Seattle Public Schools**  
January 29-February 1, 2008

**Working Agenda**  
Subject to Change as Required

#### Tuesday, January 29

<table>
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<tr>
<th>Time</th>
<th>Event</th>
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<tr>
<td>6:15 p.m.</td>
<td>Team to Meet in Hotel Lobby</td>
</tr>
<tr>
<td>6:30 p.m.</td>
<td>Dinner Meeting</td>
</tr>
</tbody>
</table>

**Team Arrival**  
Vintage Hotel  
1100 Fifth Avenue  
Seattle, WA  98101  
206.624.8000

<table>
<thead>
<tr>
<th>Time</th>
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<tbody>
<tr>
<td>6:15 p.m.</td>
<td>Team to Meet in Hotel Lobby</td>
</tr>
<tr>
<td>6:30 p.m.</td>
<td>Dinner Meeting</td>
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</table>

**Dr. Maria Goodloe-Johnson**  
Superintendent  
*Others (TBD, e.g.,)*  
*Don Kennedy, CFO*

#### Wednesday, January 30

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>7:30 - 8:00 a.m.</td>
<td>Continental Breakfast</td>
</tr>
<tr>
<td>8:00 - 9:15 a.m.</td>
<td>Team Interview</td>
</tr>
<tr>
<td>9:30 – 10:45 a.m.</td>
<td>Team Interviews</td>
</tr>
<tr>
<td>11:00 - 12:15 p.m.</td>
<td>Team Interviews</td>
</tr>
<tr>
<td>12:30 - 1:30 p.m.</td>
<td>Working Luncheon</td>
</tr>
<tr>
<td>1:30 - 2:45 p.m.</td>
<td>Team Interviews</td>
</tr>
<tr>
<td>3:00 - 4:15 p.m.</td>
<td>Team Interviews</td>
</tr>
<tr>
<td>4:15 - 5:30 p.m.</td>
<td>Team Interviews</td>
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</table>

**Karlurki Nderu, Internal Auditor**  
*Cheri Stafford, OIS III*  
*Gary Deltz, Warehouse Coordinator*  
*Anne Faherenbruch, Contracts Supervisor*  
*Barry Okada, Buyer*

#### Thursday, January 31

<table>
<thead>
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<th>Time</th>
<th>Event</th>
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<tr>
<td>7:30 - 8:00 a.m.</td>
<td>Continental Breakfast</td>
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<tr>
<td>8:00 - 9:15 a.m.</td>
<td>Team Interviews</td>
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</table>

**Susan Llewellyn, Contracts**  
**Craig Murphy, Purchasing**  
**Jennifer Diles, Budget Analyst**
<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Participants</th>
</tr>
</thead>
</table>
| 9:30 – 10:45 | Team Interviews                            | Sim Henderson, Budget Analyst  
Cheryl Klinker, Budget Analyst  
Jennifer Cassel, Budget Analyst  
Leora Tyau, Budget Analyst  
Linda Chan, CP Accountant  
Anna Chui, CP Accountant  
Sonia Crandall, Accounting Specialist II  
Marlene Fuller, AP Accounting Specialist  
Patty Murray, AP Accounting Specialist  
Lee Oldham, AP Accounting Specialist  
Mark Sutton, AP Accounting Specialist  
Leonard Young, Accounting Specialist II  
Erma Hill, ASB Fund Analyst  
Debra Kuhn, Buyer  
Wanda Huber, OS III  
Susan Johnston, Buyer  
Paul Nermo, Buyer  
Kathie Davis, Buyer |
| 11:00 – 12:15| Team Interviews                            | Minda Escarez, Accounting  
Elma Allen, Cash Office  
Grace Ngai, Accounting Analyst III  
June Chan, Accounting Specialist  
Linda Chan, CP Accountant  
Sonia Crandall, Accounting Specialist II  
Linda Chan, CP Accountant  
Sonia Crandall, Accounting Specialist II  
Linda Chan, CP Accountant  
Sonia Crandall, Accounting Specialist II  |
| 12:15 - 1:00 | Working Luncheon                           | Lloyd Wallace, Fixed Asset  
Judy Otsuji, System control  
Grace Ngai, Accounting Analyst III  
June Chan, Accounting Specialist  
Linda Chan, CP Accountant  
Sonia Crandall, Accounting Specialist II  |
| 1:00 - 2:15  | Team Interviews                            | Jim Bradley, Business Systems Analyst  
Marie Guzzardo, Accounting Specialist, Services  
Eric Sonett, Mgr., Facilities & Capital  
Duggan Harman, Mgr., L&T Fiscal  
Kevin Corrigan, Asst. Grants Finance Mgr., L&T  
Duggan Harman, Mgr., L&T Fiscal  
Kevin Corrigan, Asst. Grants Finance Mgr., L&T  |
| 2:30 - 3:45  | Team Interviews                            | Jim Bradley, Business Systems Analyst  
Marie Guzzardo, Accounting Specialist, Services  
Eric Sonett, Mgr., Facilities & Capital  
Duggan Harman, Mgr., L&T Fiscal  
Kevin Corrigan, Asst. Grants Finance Mgr., L&T  
Duggan Harman, Mgr., L&T Fiscal  
Kevin Corrigan, Asst. Grants Finance Mgr., L&T  |
| 4:00 - 5:15  | Team Interviews                            | SAP Representatives (TBD)  
SAP Representatives (TBD)  
SAP Representatives (TBD)  
SAP Representatives (TBD)  |
| 5:30 p.m.    | Team Discussion of Work Plan for Balance of Site Visit |  
SAP Representatives (TBD)  
SAP Representatives (TBD)  
SAP Representatives (TBD)  
SAP Representatives (TBD)  |
| Friday, February 1 | Continental Breakfast |  
Continental Breakfast  
Continental Breakfast  
Continental Breakfast  
Continental Breakfast  |
### Review of Human Resources, Finance, and Information Technology of the Seattle Public Schools

<table>
<thead>
<tr>
<th>Time</th>
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<th>Location</th>
<th>Presenter</th>
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<tbody>
<tr>
<td>7:30 – 12:00 Noon.</td>
<td>Team Meeting</td>
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<tr>
<td>12:00 - 1:00 p.m.</td>
<td>Working Luncheon</td>
<td>Tulio Ristorante</td>
<td>Dr. Maria Goodloe-Johnson</td>
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<td></td>
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<td>Superintendent</td>
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<td></td>
<td>Don Kennedy, CFO</td>
</tr>
<tr>
<td>1:00 p.m.</td>
<td>Adjournment &amp; Departures</td>
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</tbody>
</table>
Strategic Support/Technical Assistance Team
Department of Technology Services
Seattle Public Schools
February 3-6, 2008

Working Agenda (Tentative)
Subject to Change as Required

Sunday, February 3
Team Arrival
Vintage Hotel
1100 Fifth Avenue
Seattle, WA 98101
206.624.8000

6:15 p.m. Team to Meet in Hotel Lobby
6:30 p.m. Dinner Meeting Dr. Maria Goodloe-Johnson
Others (TBD, e.g.,)
Carla, Santorno, CAO
Don Kennedy, CFO
Non Stavnshoj, SIT
Gary Ikeda, General Counsel

Monday, February 4
7:30 - 8:00 a.m. Continental Breakfast
8:00 - 9:15 a.m. Team Interview Marjorie Mills, Dir., DoTS Services
9:30 – 10:45 a.m. Team Interviews Judy McNamee, Mgr., Systems Operations
Richard Rogers, Mgr., Telecom & Networks
Fred LaCroix, Mgr., Systems & Programming
Barbara Lippke, Mgr., Tech Training & Support
Fran Clifton, On-Site Technology Support
11:00 - 12:15 p.m. Team Interviews Cathy McLeod, Mgr., Library & Media Svcs
Fran Clifton, Mgr., Classroom Technology
Barbara Lippke Mgr., Instructional

Technology
12:30 - 1:30 p.m. Working Luncheon
1:30 - 2:45 p.m. Team Interviews Network/Sys Admin.
J. Young
C. Eastman
D. Hemmen
T. Martinez
3:00 - 4:15 p.m. Team Interviews Data Center
R. Dixon
H. Hui
Q. Nguyen
V. Perkins
L. Tappon
N. Wilder
4:15 - 5:30 p.m. Team Interviews Telcom Systems
Review of Human Resources, Finance, and Information Technology of the Seattle Public Schools

D. Hansen
R. Smith
J. Lange
Network Systems
S. Junor
Cell Phone Billing
T. Lott

5:30 p.m.  Team Discussion of Work Plan for Balance of Site Visit

Tuesday, February 5

7:30 - 8:00 a.m.  Continental Breakfast

8:00 - 9:15 a.m.  Team Interviews

Network Analysts
S. Al Khursan
S. Bogut
J. Chen
L. J. Corpuz
M. Cross
J. Hammer
A. Imran
M. Isenberg
J. Randles
B. Miller
M. Morton
J. Nguyen
S. Noebei
R. Shore
P. Loughborough
S. Wallave
R. Yaplee
V. VanderHeyden
M. Johnson

9:30 - 10:45 p.m.  Team Interviews

Financial Systems
J. Bradley
M. Chan
M. Fraser
J. Jones
R. Seko
HR/Payroll Systems
R. Byers
K. Cunningham
S. Reddy
S Osla-Sepulvida
W. Banta

11:00 - 12:00 p.m.  Team Interviews

Web Services
A. Markishtum
D. Moore
VAX Systems
K. Hoxit
Other Systems
M. Medina

12:00 - 1:00 p.m.  Working Luncheon

1:00 - 2:30 p.m.  Team Interviews

eSIS S&P
P. DeFusco
G. Lantz
G. Larson
Review of Human Resources, Finance, and Information Technology of the Seattle Public Schools

K. Firestone
P. Suiunca
B. Alplanalp

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<td>2:30 - 4:00 p.m.</td>
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<td>4:00 - 5:15 p.m.</td>
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<td>Team Discussion of Work Plan for Balance of Site Visit</td>
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**Wednesday, February 6**

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<td>Discussion of Findings &amp; Recommendations</td>
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<td>1:00 p.m.</td>
<td>Adjournment &amp; Departures</td>
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ATTACHMENT D. INDIVIDUALS INTERVIEWED

A. Human Resources

- Dr. Maria Goodloe-Johnson, Superintendent
- Gary Ikeda, General Counsel
- Don Kennedy, Chief Financial Officer
- Fred Stephens, Director of Facilities
- Sherry Johnson, Assistant Budget Director
- Marjorie Mills, Director of Technology
- Michelle Corker, Instructional Director
- Scott Whitbeck, Instructional Director
- Linda Hoste, Director of Curriculum and Professional Learning
- Pat Sanders, Instructional Director
- Ruth Medsker, Instructional Director
- Laurie Taylor, Director of Human Resources
- Tom Peterson, Interim Director of Human Resources
- Jeannette Bliss, Mgr., HR Service Team 1
- Misa Garmoe, Mgr., HR Service Team 2
- Gloria Morris, Mgr., HR Service Team 4
- Penny Peters, Interim Mgr., HR Service Team 5
- Pat Covich, Supvr., HR Specialist Team
- Wanda Banta, HR Service Team 1
- Dana DeJarnatt, HR Service Team 2
- Margaret Porter, HR Service Team 3
- Leslyn Jones Petitt, HR Service Team 4
- Amy Valeanti, HR Service Team 5
- Lois Brown, Substitute Office
- Sue Durant, Substitute Office
- Laurel Moody, Position Control
- Catherine Erickson, EAP Supervisor
- Chibike Nwabude, HR Service Team 1
- Ginny Rillo, HR Service Team 2
- Debi Isla Sepulveda, HR Service Team 6
- Salina Hemmen, HR Service Team 4
- Sandy Taksas, HR Service Team 5
- Beverly Johnson, HR Service Team 1
- Mary Lou Webster, HR Service Team 1
- Demetrice Lewis, HR Service Team 2
- Eva Edwards, HR Service Team 3
- Sue Means, HR Service Team 4
- Serena Gregerson, HR Service Team 5
- Harvey Deutsch, Recruiter
• Starla Smith, Senior Administrative Assistant
• Beverly Booker, Personnel Specialist
• Patricia Miller, Personnel Specialist
• Stacey Murray, Recruiter
• Marni Campbell, Principal, High School
• Ed Noh, Principal, Elementary School
• Jill Hudson, Principal, Middle School
• Robert Gary Jr., Principal, High School
• Audhra Lutz, Principal, Middle School
• Windy Kimball, President, SEA
• Dave Westberg, Business Agent, Local 609
• Lee Newgent, Business Agent, Building Trades

B. Finance

• Dr. Maria Goodloe-Johnson, Superintendent
• Don Kennedy, Chief Financial Officer
• Ronic Liria, Manager, Accounting
• Linda Sebring, Director, Budgeting
• Bob Westgard, Manager
• Karlurki Nderu, Internal Auditor
• Cheri Stafford, OIS III
• Gary Deltz, Warehouse Coordinator
• Anne Faherenbruch, Contracts Supervisor
• Barry Okada, Buyer
• Barry Tsoi, GL/Reporting
• Barb Sweet, Sr. Payroll Specialist
• Roxana Meville, Benefit Specialist
• Kathy Technow, AP Supervisor
• Tom Cambronero, Grants Supervisor
• Kevin Kent, Sr. Analyst II
• Tsegai Bekele, Sr. Analyst I
• Annette Baker, Sr. Data Analyst
• Sherry Johnson, Supervisor
• Susan Llewellyn, Contracts Manager
• Craig Murphy, Purchasing Manager
• Jennifer Diles, Budget Analyst
• Sim Henderson, Budget Analyst
• Cheryl Klinker, Budget Analyst
• Jennifer Cassel, Budget Analyst
Review of Human Resources, Finance, and Information Technology of the Seattle Public Schools

- Leora Tyau, Budget Analyst
- Kevin Dial, Budget Analyst
- Linda Chan, CP Accountant
- Anna Chui, CP Accountant
- Sonia Crandall, Accounting Specialist II
- Marlene Fuller, AP Accounting Specialist
- Patty Murray, AP Accounting Specialist
- Lee Oldham, AP Accounting Specialist
- Mark Sutton, AP Accounting Specialist
- Leonard Young, Accounting Specialist II
- Erma Hill, ASB Fund Analyst
- Fred LaCroix, Systems and Programming Manager
- Marjorie Mills, Director, DOTS
- Lloyd Wallace, Fixed Asset Supervisor
- Judy Otsuji, System Control Analyst
- Grace Ngai, Accounting Analyst III
- June Chan, Accounting Records Specialist
- Elma Allen, Cash Office Coordinator
- Minda Escarez, Accounting Specialist II
- Kenny Ching, Accounting Analyst
- Kathy Gallchan, Accounting Analyst
- Marie Guzzardo, Accounting Specialist, Food Services
- Eric Sonett, Manager, Facilities & Capital Projects
- Duggan Harman, Manager, Learning & Teaching, Fiscal Compliance
- Kevin Corrigan, Assistant Grants Finance Manager, Learning & Teaching
- Marlene Meyers, Senior Cost Technician, Learning & Teaching
- Min Yee, Cost Analyst, Compliance, Learning & Teaching
- Marcie Overbeck, Program Analyst, School to Work Program
- Victoria Ouk, Cost Support Analyst, DOTS

C. Information Technology

- Dr. Maria Goodloe-Johnson, Superintendent
- Don Kennedy, Chief Financial Officer
- Marjorie Mills, Director, Technology Services
- Judy McNamee, Manager, Systems Operations
- Richard Rogers, Manager, Telecom & Networks
- Fred LaCroix, Manager, Systems & Programming
- Barbara Lippke, Manager, Tech Training & Support
- Fran Clifton, Manager, On-Site Technology Support

Council of the Great City Schools 56
Debbie Hansen, Telecom Analyst
Ron Smith, Telecom Analyst
John Lange, Telecom Analyst
Steve Junor, Telecom Analyst
Tracey Lott, Administrative Assistant
James Young, Support Analyst
Chris Eastman, Network Analyst
Tito Martinez, Senior Analyst
April Johnson, Network Administrator (Contractor)
Richard Dixon, Operations Supervisor
Gloria Lantz, Senior Program Analyst
Gabriela Larson, Senior Program Analyst
Kay Firestone, Oracle Data Base Administrator
Pamela Suianuoa, Business Analyst
Betsy Abplanalp, Training Coordinator
Cathy McLeod, Manager, Library & Media Services
Fran Clifton, Manager, Classroom Technology
Barbara Lippke, Manager, Instructional Technology
Mike Donlin, Manager, Education Technology Program
Anne Robinson, Manager, Special Projects
Sam Alkhursan, Network Analyst
Jin G. Chen, Network Analyst
L. J. Corpuz, Network Analyst
Steve Noebel, Network Analyst
Vanessa VanderHeyden, Network Analyst
Matt Johnson, Network Analyst
Jim Bradley, SAP Financial Support
Marshall Chan, SAP Programer
Matt Fraser, SAP System Administration
Becky Meritt, Business Systems Analyst
Ryan Seko, SAP System Analyst
Kit Cunningham, Programmer/Analyst
Sargeeta Reddy, Programmer/Analyst
Tiffani Marsing, Business Analyst
Joy Smith, Business System Analyst
Jill McCullough, Business Analyst
Jim O’Keeffe, Business Analyst
Jeff Jones, Business Systems Analyst
Amy Markishtum, District Web Master
Dan Moore, Web Application Development
Greg Hughes, Instructional Broadcast Center
Kathy Hoxit, VAX System Analyst
Susan Roe, Project Consultant (Contractor)
Eric Caldwell, Instructional Technology
• Gary Cranston, Instructional Technology
• Abbey Alessi, Instructional Technology
• Harvey Wright, Instructional Technology
• Janice Johnson-Palmer, Instructional Technology
• Darla Donnelly, Instructional Technology
• LeAnn Sahlin, Instructional Technology
• Robert Shore, Project Manager
• Craig Barwell, Network Analyst
• Michael Rotten, Network Analyst
• Margaret Purcell, Project Manager
• Susan Karboski, SQL Server Data Base Administrator
• Christina Tsui, VAX Programmer/Analyst
• Mark Fleming, SQL Server Developer
• Margarita Medina, Web Developer
• Barbara Grubel, VAX Programmer/Analyst
• Ken Wong, VAX Programmer/Analyst
ATTACHMENT E. ABOUT THE COUNCIL OF THE GREAT CITY SCHOOLS

Council of the Great City Schools

The Council of the Great City Schools is a coalition of 66 of the nation’s largest urban public school systems. Its Board of Directors is composed of the Superintendent of Schools and one School Board member from each member city. An Executive Committee of 24 individuals, equally divided in number between Superintendents and School Board members, provides regular oversight of the 501(c)(3) organization. The mission of the Council is to advocate for urban public education and assist its members in their improvement and reform. The Council provides services to its members in the areas of legislation, research, communications, curriculum and instruction, and management. The group convenes two major conferences each year; conducts studies of urban school conditions and trends; and operates ongoing networks of senior school district managers with responsibilities for such areas as federal programs, operations, finance, personnel, communications, research, and technology. The Council was founded in 1956 and incorporated in 1961, and has its headquarters in Washington, D.C.
### History of Strategic Support Teams Conducted by the Council of the Great City Schools

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