AGENDA

Meeting Type:	S
Date.	04/20/1993
SUBJECT	Joint City County School Board Lunch

City of Charlotte, City Clerk's Office

City/County/School Board Luncheon
Tuesday, April 20, 1993
12:00 Noon
Charlotte-Mecklenburg Government Center

I.	Opening Remarks	H Parks Helms
II.	Chamber School Efficiency Study	Deborah Pinchak
III	School Master Plan	Chuck Dulaney Stanley Watkins
IV	School Capital Needs	Reverend George Battle
V	Adjournment of City Council/School Board Meeting	
VI	Continuation of Board of County Commission April 19, 1993 Meeting	H Parks Helms

1) Appointment to ABC Board
2) Executive Session
   a) Litigation
   b) Personnel Matter
   c) Land Acquisition

VII Adjournment of Board of County Commission Meeting

BUDGET INFORMATION CALENDAR

•May 14- 336-INFO
Employee Hotline will offer a recorded Benefits Update

•May 21- *Update Newsletter*
Employees will receive Benefits Update, Budget Information Calendar, etc , with paychecks

•May 26, 5 p.m.- Budget Presentation, Cable Channel 32*
The City Manager will present the Budget to the City Council

•May 27, 8:15 a.m.- Budget Presentation, Training Channel*
Budget highlights will be presented to department heads and key staff

•May 28, *Around City Hall Magazine*
Employees will receive a message from the City Manager, Budget Highlights, Benefits Update, Budget Calendar, etc

•June 4- *Update Newsletter* (Tentative)

•June 7, 7 p.m.- Budget Public Hearing, Cable Channel 32*
The City Council will hold the annual public hearing on the Budget

•June 16, Noon- *City Employee Update* TV Call-In, Training Channel
Employees will have an opportuntiy to call-in questions about the budget, benefits, etc

•June 18- *Update Newsletter* (Tentative)

•June 25- *Around City Hall Magazine*

•June 28, 6:30 p.m.- City Council Meeting/ Budget Adoption, Cable Channel 32*

•June/July- City Employee Information Enrollment Meetings
Meetings will be held for all employees to receive information on the new benefits package and to enroll in the program The Human Resources Department will contact all departments to schedule the meetings

*Meeting held in the CMGC, Meeting Chamber

Training Channel Cablevision, Channel 22, Vision Cable, Channel 69, CMGC, Channel 53

Charlotte-Mecklenburg School Facilities Master Plan

Capital Improvement Program Report

April 20, 1993

Prepared by
Charlotte-Mecklenburg Schools
&
Charlotte-Mecklenburg Planning Commission

PLAN FOCUS

To produce a 10-year school facilities physical development plan that accomplishes the following:

- Accommodates forecasted student enrollment
- Achieves school placement policy parameters established by the Charlotte-Mecklenburg School Board
- Upgrades all school facilities to meet the challenges of a modern curriculum structure
- Incorporates alternative school development strategies to the extent they do not compromise the curriculum mission of the school system

PLAN DEVELOPMENT GUIDELINES

Plan development guidelines seek to achieve the following objectives in the order of their priority:

- Racially balancing each school's student population (while minimizing satellite assignments)
- Maintaining student stability and continuity from grade to grade
- Efficiently utilizing school facilities

To achieve the development objectives, the following tools will be used in the following order of priority:

- Stand Alone Schools
- Mid-Point Schools
- Magnet Schools

POLICY ASSUMPTIONS GOVERNING THE PLAN'S DEVELOPMENT

1. **Student Population Forecast** - The student population forecast was derived from the Enrollment Projection Module in the School Facilities Planning Model. The student forecast for the 10-Year school planning horizon is 101,226 as shown in the figure below.

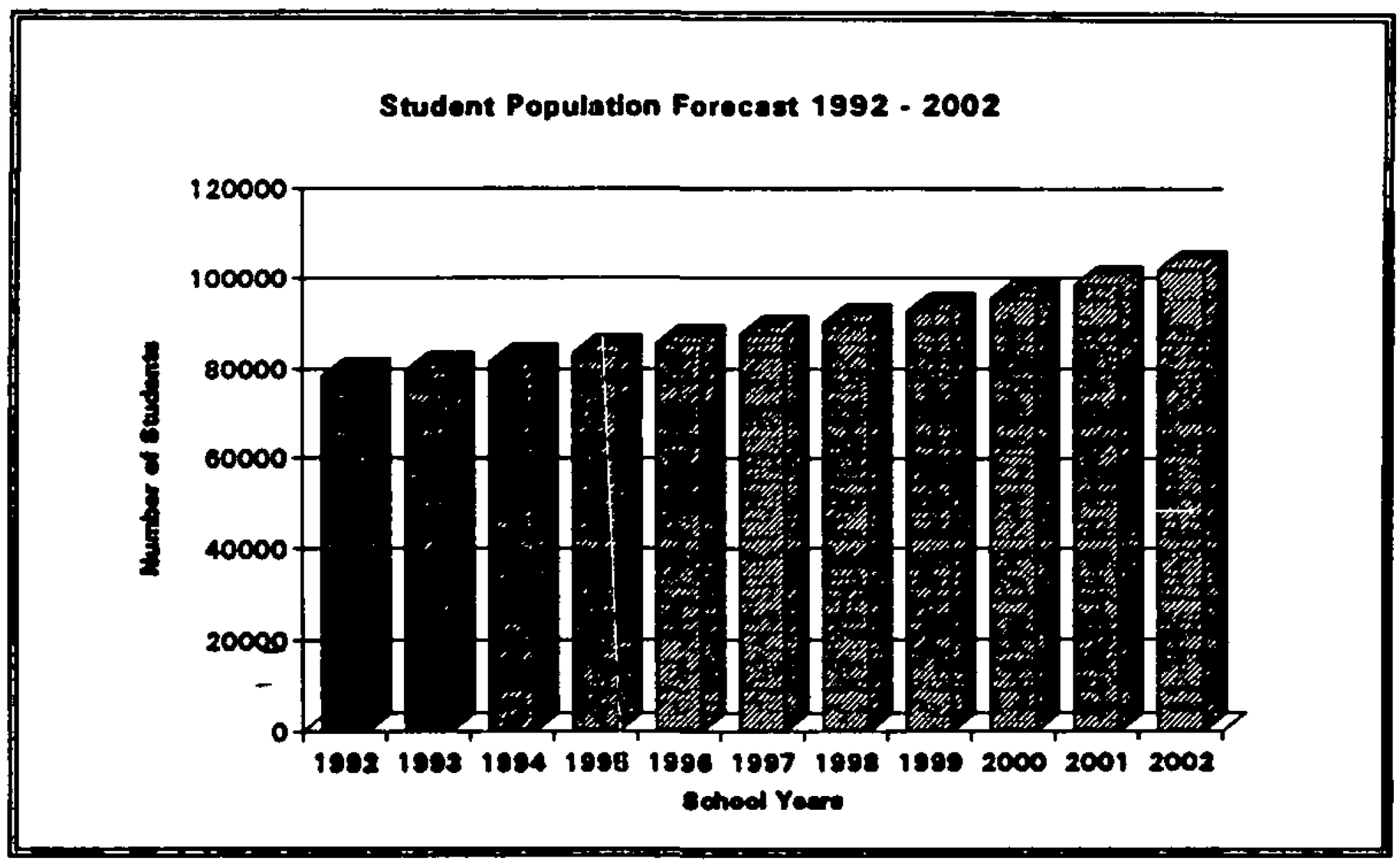
   Components of the projection formula include the following:

   A. Forecast of Kindergarten enrollment based on previous five-year births

   B. Cohort survival (grade progression) from grade to grade based on a five-year moving average of promotion, repeat, skip and dropout rates

   C. Forecast of in-migration (new students) based upon projected new homes.

   D. Sub-Area projections for black population growth and migration



2. **Racial Balance** - Racial balance is achieved when the percentage of black students in an individual school is within fifteen percentage points of the percentage of black students system wide. In 1992, the student population is 40% black, and racial balance is achieved when the black population in individual schools range from 25% to 55%.

3. **Continuity and Stability** - Neighborhood peer groups will stay together between Kindergarten and 12th grade.

4. **School Facility Utilization** - All schools have a student utilization of a least 80% but no more than 100%.

5. **School Placement Restriction** - No new school may be constructed within a Census Tract with less than a 10% black population unless construction of that school is tied to the development of housing that will generate a racially balanced population for that school. (Existing schools in census tracts which are less than 10% black may be expanded to accommodate additional students.)

6. **School Access Restrictions** - The following restrictions apply to school development types:

   A. Stand Alone Schools - Populated with students living within a contiguous area surrounding the school. The area includes sufficient number of majority and minority students to racially balance the school.

   B. MidPoint Schools - A midpoint school serves three geographical areas which includes a base area surrounding the school, a satellite area that includes predominantly black students, and a satellite area which includes predominately white students. A cap of 20% student attendance applies the base area which is not naturally integrated surrounding a school.

   C. Magnet Schools - Enrollment in magnet schools is open to all students living in the school district. Magnet schools are racially balanced by controlling the application and admission process through which students enter the school. Students living within a neighborhood "shadow zone" surrounding the school will have priority over students for placement in 75% of the black and 75% of the non-black spaces in the school.

6. **Grade Structure Configuration** - The grade structure selected for 1997 -2002 is as follows:

   Elementary Schools - Kindergarten through 5th Grade

   Middle Schools - 6th Grade through 8th Grade

   High Schools - 9th Grade through 12th Grade

7. **School Size** - For new school development, a maximum size of 800 students was used for elementary schools, 1,000 students for middle schools, and 1,600 students for high schools.

8. **Classroom Capacity** - Capacities for buildings will be established by allocating 22 students per classroom in elementary and middle schools and 20 students per classroom in high schools. Assuming that class sizes continue to average 26 students, this approach to establishing building capacities provides classrooms for special groups (such as exceptional children) and special activities (such as art or music). By contrast, these capacities are lower than the legal standards which allow 29 students per classroom in elementary and middle schools and 33 students per classroom in high schools.

9. **Bus Rides** - Bus rides to non-voluntary school assignments will not exceed 60 minutes for one-way travel.

2002 SCHOOL FACILITIES NEEDS

FACILITIES NEEDS (In 1993 Dollars)

	New School Construction		School Expansions	
	No.	Cost	No.	Cost
ele	19	$137,258,000	6	$2,000,000
middle	6	$58,652,000	0	$0
high	3	$86,680,000	9	$25,278,000
total	28	$282,590,000	15	$27,278,000
GRAND TOTAL		$309,868,000		

SCHOOL TYPE

ELEMENTARY SCHOOLS 2002

	Total	New
Stand Alone	38	3
Stand Alone w/ Satellite	16	1
Midpoint	15	13
Magnet	27	2
Other	N/A	N/A
TOTAL	96	19

MIDDLE SCHOOLS 2002

	Total	New
Stand Alone	16	3
Stand Alone w/ Satellite	3	0
Midpoint	3	3
Magnet	8	0
Other	N/A	N/A
TOTAL	30	6

HIGH SCHOOLS 2002

	Total	New
Stand Alone	9	2
Stand Alone w/ Satellite	3	0
Midpoint	0	0
Magnet	2	1
Other	N/A	N/A
TOTAL	14	3

City / County / School Board 4/20/93

Mayor	✓	Chairman Helms	✓
Campbell		Doug Booth	✓
Clodfelter		Cherico	✓
Hammond	✓	Kinsey	✓
McCrory		Scher	✓
Majeed	✓	Schrader	✓
Magnum		Walter	✓
Martin	✓		
Patterson		Battle	✓
Reid	✓	Pihard	
Scarborough		Burgess	✓
Wheeler	✓	Bynum	
		Griffin	✓
		Lassiter	✓
		McIntyre	
		Richards	✓
		Sitt	✓

12:30

I Parks Helms

Battle

II Deborah Pinchak (Hugh Dowdy) Presented report

Helms

III. School Master Plan

Stanley Watkins - Planning has worked with School System on a future Master plan for Schools

Nakita Wright - Capital Imp. Program Report

- Guidelines:- Racial Balance, Maintain student stability, Efficient utilization of school facilities
- Student Population Forecast 101,000 students by 2002

Chuck Dulaney - Facilities New School Needs by 2002

19 new elem

6 new mid

3 new high

Some expansions

2002 New school costs

High - $111,958,100

Elem. 139,258,000 19 new 6

Middle 58,652,000

5 yr. CIP - New Schools

$177,206,000

High 74,639

Mid 29,326,000

Elem 73,241,000

Include 17,852,000 for expansions

Stan Watkins

School Fac Master Plan

Next Steps

- Plan Released by 6/93
- Public Forums/SB Workshops June, 1993
- Public Hearings

Lassiter - Did you plot 1982-1992

Dulaney

Watkins

Reid

Watkins

Reid

Watkins

Dulaney

Reid - Did you use N.C. State Demographer

Dulaney

Kinsey -
Dulaney
Cherico - How did we get from
Recommendation of Citizen's group to this report
Dulaney
Cherico
Dulaney
Lassiter
Dulaney
Lassiter
Dulaney 6
Lassiter
Dulaney
Cherico Booth came in 1:00
Dr. John Murphy
Cherico
Dulaney: Year Round is now
voluntary -
Arthur Griffin -
Cherico - Work schools more closely with
Social Services
Murphy -
Schrader
Murphy - 2 groups of students
simultaneously through same building
Kinsey

Dulaney

Walter - how many new schools did we build over last 10 years

Dulaney

Lassiter

Dulaney

Lassiter

Dulaney - Expansion costs include site cost

Fox - ask staff to estimate operating costs

Dulaney

Helms - Was any thought given to standardization of plans?

Dulaney. Plans may need to be adapted to sites

Susan Burgess

Helms

Burgess

Cherico

Battle

Cherico

Griffin

Cherico

Griffin

Cherico

Hammond — Tape 1, Side 2
Cherico — 1:20
Martin - Build no new school in a census tract that is less than 10% black
Delaney
Griffin - Ballentine Project
Schrader - Growing lack of concern in public for passage of bonds - Need a Plan B
Murphy
Schrader
Helms - Can't neglect it -
Walter
Murphy
Battle - Ask County Commission to join us Friday - School Board is having another CIP Meeting - We will be going through everything item by item -
Burgess
Helms

Adjourn 1:25

CHARLOTTE CHAMBER

CHARLOTTE MECKLENBURG SCHOOLS

OPERATIONS REVIEW

Objective: Identify opportunities for cost saving and/or resource re-allocation to improve efficiency and effectiveness of CMS operations

Method: Study teams of volunteer business leaders assigned to review 13 separate areas of CMS operations

Process:

- Assemble Operations Review Task Force
- Engage consultant Kent Oehm, Grant Thornton
- Recruit, train, assign volunteers
- Conduct studies
- Integrate recommendations and make final report

Results:

- Over 4000 hours of volunteer effort by 48 members of study teams, drawn from 33 companies
- Over 200 separate recommendations
- Major recommendations in areas of facility management, transportation, security, information systems and work force management
- List of issues to address with DPI, Raleigh
- Listed opportunity to save/redirect over $4 6mm

POTENTIAL SAVINGS FOR RE-DIRECTION

Functional area	Estimated Costs	Estimated dollar savings
Organization/Administration	$	$ 50,000
Facilities Maintenance	740,000	1,000,000
Information Technology		725,000
Finance		225,000
Transportation		781,000
Security		500,000
Printing		60,000
Human Resources	100,000	1,158,000
Communications	100,000	-
Total	$ 940,000	$4,499,000
Net savings		$3,559,000
Transportation (One-time)		$1,008,000

Reference Operations Review Summary, p 10, 3/31/92

3/24/93

CHAMBER OF COMMERCE RECOMMENDATIONS STATUS
COSTS / SAVINGS DETAIL

3/19/93

REF #	TEAM	RECOMMENDATION	OWNER	FINISH	% COMP	NOTES	REF COST	REF SAV
1	ORG ANALYSIS	ESTABLISH 3 MANAGEMENT TEAMS	GEORGE	6/30/94	50%		0	0
2	ORG ANALYSIS	REORG FAC MAINT CUST OPS	WALLACE	7/1/93	40%		0	0
3	ORG ANALYSIS	INTERNAL/EXTERNAL ASSISTANCE FOR SCHOOL BASED MGT	GEORGE	1/30/93	90%		0	0
4	ORG ANALYSIS	PETITION STATE BUDGET DEPT FOR FUNDING W/O CONSTRAINTS	GEORGE	10/31/92	100%		0	0
5	ORG ANALYSIS	"EFFECTIVE SCHOOLS" REPLACES "SOUTHERN ASSOC " ACCREDITATION	GEORGE	10/31/92	100%		0	0
6	ORG ANALYSIS	STAFFING ALLOC STANDARDS ESTABLISHED BY SMT	SALTRICK HOLLEMAN	2/1/93	90%	B	0	0
7	ORG ANALYSIS	NEW POSITIONS JUSTIFIED BY PRINCIPALS VIA ANNUAL PLAN	SALTRICK HOLLEMAN	9/30/92	100%		0	0
8	ORG ANALYSIS	SCH LEVEL ADMIN FOCUS ON INSTRUCT LEADERSHIP/TEACHER SUPPORT	SALTRICK HOLLEMAN	9/1/93	50%		0	0
9	ORG ANALYSIS	ASST SUPT VEHICLE ALLOWANCE VS VEHICLE PROVIDED	WALLACE LORANGE	7/1/93	25%		0	0
10	ORG ANALYSIS	6 VEHICLE FLEET AT CENTRAL LOCATION	WALLACE LORANGE	7/1/93	25%		0	0
11	ORG ANALYSIS	EMPLOYEE MILEAGE REIMBURSEMENT AT IRS RATE	WALLACE LORANGE	7/1/93	25%		0	50000
12	ORG ANALYSIS	AUTO TRAVEL EXPENSE CONTROL PROGRAM	WALLACE LORANGE	1/31/93	100%		0	0

NOTES: B= BUDGET ITEM R=REJECTED L=LEGAL

CHARLOTTE CHAMBER OPERATIONS REVIEW

CMS IMPLEMENTATION STATUS

- PROCESS:
  - Create Project Data Base
  - Periodic Status Reports
  - Document Progress, Exceptions

- OVERVIEW·

# of Recommendations	=	166
# of Departments Affected	=	13
# of Chamber Reviews Completed	=	11
% of Recommendations - Review Completed	=	63%
% of Recommendations In Process	=	37%
% of Recommendations Budget Related	=	12%
% of Recommendations Deferred/Rejected	=	15%

3/24/93

Functional Area	Estimated Cost ($)	Estimated Savings ($)	Results
Organizational Structure		50,000	❑ Total savings = $61,490 (93/94) - Review committees recommendations accepted - Effective schools = $11,490 savings (92/93) - Administrative vehicle plan implementation = $50K savings (93/94)
Facilities Maintenance	740,000	1,000,000	❑ New positions, estimated at $740K/year, suggested, reduced to 1 director position ❑ $500K savings is dollarized hours based on completion of Satellite Facilities (2 in 94 and 1 in 95) Represents a 15% increase in efficiency for 70 employees Projected savings of 24,000 hours of maintenance time to be redirected in schools ❑ $220K expended to implement Computerized Preventative Maintenance program for capital project and facility maintenance (Part of existing Conditions Study Bonds) ❑ 250K-$500K savings represents long term savings estimate which will accrue from capital improvement planning and more efficient use of facilities equipment Increase in air conditioners and number of schools will probably offset these savings
Capital Projects			❑ One position proposed ($80K) which combines capital project management and maintenance responsibilities
Information Technology		300,000 400,000 25 000	❑ Established CIO position ($100K) ❑ *Reorganization has appropriately redirected 6000 hours to other* activities in Information Center and end-user support Projected savings were overstated in original report (Ref Interim Assessment) Data Center operating with minimal staff and reasonable costs ❑ Changes are required in existing salary ranges for system analyst and system programmer positions *Currently non-competitive* with local industry which forces additional expenditures for contract system programmers ❑ Additional needed expenditures of $245K have been identified for end-user education and process re-engineering ❑ Improved data security has been established at a cost of $100K/year (Ref Coopers & Lybrand Audit Report) ❑ Renegotiation of telephone service resulted in annual savings of $25K
Finance		225,000	❑ $160K-$225K savings were projected based on belief that various legislature initiatives will be successful (1995) ❑ Future telecommunications installation project identified at a cost of $25K
Supply Services			❑ Computerized purchasing and inventory control systems were suggested ($400K) No action will be taken until legislative barrier issues are resolved
Transportation		781,000/year *1 008M one time*	❑ Installation of automatic bus washers was rejected in lieu of *continued expense of hiring summer students* at $46 100/year ❑ $29,500 reduction on maintenance travel will be achieved 93/94 ❑ Engine rebuild (external) resulted in no savings to date ❑ Revised vehicle maintenance schedule resulted in $21K savings in 92/93 ❑ $671K annual savings based on completion of satellite facilities in *94/95* will be reviewed in detail in *93/94* budget ❑ $1 01M represents capital expense avoidance for buses and wreckers, will be partially achieved More buses required to meet increased enrollment and Magnets ❑ 91 bond funds used for Satellite 1 & 2 93-96 Bonds required for 3rd facility

Functional Area	Estimated Cost ($)	Estimated Savings ($)	Results
Security		500,000	❑ $500K savings realized, security purchased from City/County at cost of $600K, until Capital Improvement Plan installs security systems in all buildings ❑ $1 3M is estimated cost of district wide upgrades and security system installations
Printing & Graphics		60,000	❑ $60K is depreciation expense and redirected to technology for schools Greater controls now in place over purchase of "replacement" hardware
Human Resources	100,000	58,000 1,100,000	❑ EAP outsourced 3,000 hours redirected to schools Cost of outsourcing is $140K with additional benefits to all employees ❑ Substitute calling system is being installed and results in savings of 41,400 hours/year for assistant principals (no dollar savings) $75K system cost Additional cost of one technician, telephones and maintenance charges is $30K/year
Communications	100,000		❑ Cost avoided for this position (filled through redirection of existing position)
Child Nutrition			❑ Point-of-sale terminals recommended for school cafeterias Cost estimated at $1 5M Pilot program for 5 schools underway at a cost of $50K

CONTINUING ISSUES

Closure on Recommendations in Process

Tracking Results vs. Tracking Implementation

Revisit Deferred/Rejected Recommendations

"Raleigh Makes Us Do It"/Legislative-Regulatory Barriers

CHARLOTTE CHAMBER OPERATIONS REVIEW

TIMELINE

- OPERATIONS REVIEW INITIATED — November 1991
  - 13 Studies

- FINAL REPORT TO CHAMBER/CMS — March 31, 1992
  - 166 Recommendations

- INTERIM ASSESSMENT REQUESTED — October 1992
  - Status Report to CMS — December 1992
  - 11 Study Teams Complete — February 1993

- CHAMBER STEERING COMMITTEE REVIEW — March 9, 1993

- CHAMBER REVIEW FINAL REPORT — March 24, 1993

CHARLOTTE CHAMBER OPERATIONS REVIEW

SUMMARY

- STUDY ADDRESSES 13 FUNCTIONAL AREAS
  - Community Volunteers/9 Companies
  - Directed by Grant Thornton Consultants

- CMS RESTRUCTURING IN JANUARY 1992
  - Administrative Positions Eliminated
  - Redirected to Schools

- COMMON THEMES PRESENTED
  - More Planning and Coordination Is Required
  - Define Procedures and Training for Employees
  - Increase Accountability in Selected Areas
  - Major Investment in Administration Technology and "Systems" Required
  - Consider Opportunities for Privatization

- STATE REQUIREMENTS/CONSTRAINTS
  - State Micromanagement Incurs Cost
  - Purchasing Constraints
  - Transportation Constraints
  - Criminal Record Checks
  - Uniform Education Reporting System (UERS)

3/24/93

CHARLOTTE CHAMBER OPERATIONS REVIEW

SUMMARY (continued)

- COSTS/SAVINGS
  - Costs and Savings Are Estimates Only
  - Methodology for Cost/Savings Varies
  - Savings Achieved Over 2 - 4 Years
  - Achievement of Savings Assumes

    State Budget/Payroll Simplifications (Legislative Agenda)

    Some Resource Savings Are Overtime Hours (Not $)

    Substitute Calling

    Maintenance

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CHARLOTTE CHAMBER OPERATIONS REVIEW

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3/24/93

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3/19/93

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COSTS / SAVINGS DETAIL

3/19/93

REF #	TEAM	RECOMMENDATION	OWNER	FINISH	% COMP	NOTES	REF COST	REF SAV
13	FAC MAINT	DEFINE MISSION STATEMENT OF MAINT DEPT	WALLACE	6/30/92	100%		0	0
14	FAC MAINT	DEFINE ROUTINE MAINTENANCE RENOVATION EMERG MAINT	WALLACE	6/30/92	100%		0	0
15	FAC MAINT	ESTABLISH STANDARDIZED ZONES FOR CREW ASSIGNMENT	WALLACE	6/30/93	50%		0	0
16	FAC MAINT	MAINT DEPT SALARY STRUCTURE REVIEW	WALLACE	6/30/93	80%	B	0	0
17	FAC MAINT	SKILL DEVELOPMENT & TRAINING PROGRAM (MAINT DEPT)	WALLACE	6/30/95	80%		0	0
18	FAC MAINT	PROVIDE UNIFORMS FOR MAINT DEPT EMPLOYEES NOT JUSTIFIED	WALLACE	1/31/93	100%	R	0	0
19	FAC MAINT	MODIFY FACILIT MAINT & CUST OPS ORG STRUCTURE	WALLACE	1/31/93	100%	R	500000	0
20	FAC MAINT	ADDITIONAL STAFF HORTICULTURIST	WALLACE	6/30/93	100%	R	40000	0
21	FAC MAINT	ADDITIONAL STAFF ARBORIST	WALLACE	6/30/93	100%	R	40000	0
22	FAC MAINT	ADDITIONAL STAFF PLANNER/SCHEDULER	WALLACE	6/30/93	100%	R	40000	0
23	FAC MAINT	ADDITIONAL STAFF HVAC SPECIALISTS (2)	WALLACE	6/30/93	100%	R	40000	0
24	FAC MAINT	ADDITIONAL STAFF ENVIRONMENTAL/SAFETY ENGINEER	WALLACE	6/30/93	100%	R	40000	0
25	FAC MAINT	ADDITIONAL STAFF ELECTRICAL ENGINEER	WALLACE	6/30/93	100%	R	40000	0
26	FAC MAINT	OUTSOURCING PEST CONTROL (INT & EXTERIOR)	WALLACE	12/31/92	100%	R	0	0
27	FAC MAINT	OUTSOURCING TURF CARE (MOWING/SEEDING/FERT \)	WALLACE	6/30/92	100%	R	0	0
28	FAC MAINT	OUTSOURCING PAINTING (INTERIOR & EXTERIOR)	WALLACE	6/30/92	100%	R	0	0
29	FAC MAINT	OUTSOURCING PARKING LOT SEALING & STRIPING	WALLACE	4/30/93	100%	R	0	0
30	FAC MAINT	OUTSOURCING PORTABLE CLASSROOM MOVEMENT	WALLACE	6/30/92	100%	R	0	0
31	FAC MAINT	OUTSOURCING ROOF REPAIR & CONSTRUCTION	WALLACE	6/30/92	100%		0	0
32	FAC MAINT	OUTSOURCING RE BID CONTRACTS > 2 YEARS OLD	WALLACE	6/30/92	100%		0	0
33	FAC MAINT	FACILITIES MAINT WORK HOURS = 10AM TO 6 30PM	WALLACE	1/31/93	100%		0	0
34	FAC MAINT	IMPLEMENT COMPUTERIZED PREVENTATIVE MAINTENANCE PROGRAM	WALLACE	6/30/94	20%	B	0	500000
35	FAC MAINT	LABOR & MATERIALS CHARGE BACK TO SCHOOLS FOR NON ROUTINE MAINT	WALLACE	6/30/92	100%		0	0
36	FAC MAINT	SATELLITE PARTS HOUSES FOR MAINTENANCE SUPPLIES	WALLACE	6/30/93	30%	B	0	500000

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CHAMBER OF [illegible] RECOMMENDATIONS STATUS
COSTS / SAVINGS DETAIL

3/19/93

REF #	TEAM	RECOMMENDATION	OWNER	FINISH	% COMP	NOTES	REF COST	REF SAV
37	CUSTODIAL OPS	EXPAND/RENAME OPERATIONAL SUPERVISOR POSITION	WALLACE	6/30/92	100%		0	0
38	CUSTODIAL OPS	REVIEW STAFFING REQUIREMENTS PER SITE	WALLACE	8/14/92	100%		0	0
39	CUSTODIAL OPS	SCHEDULE CLEANING CREWS AT NIGHT	WALLACE	9/30/92	100%		0	0
40	CUSTODIAL OPS	STANDARDIZE & CENTRALIZE PURCHASING FOR CUST OPS	WALLACE	1/31/93	100%		0	0
41	CUSTODIAL OPS	LIMIT DUTIES TO CUSTODIAL AND LIGHT MAINTENANCE	WALLACE	6/1/93	100%		0	0
42	CUSTODIAL OPS	DOCUMENT CUSTODIAL PROCEDURES PERSONNEL POLICIES	WALLACE	6/30/92	100%		0	0
43	CUSTODIAL OPS	STANDARDIZE CUSTODIAL OPERATIONS (TRAINING EQUIPMENT)	WALLACE	1/31/93	100%		0	0
44	CUSTODIAL OPS	PILOT MAINTENANCE PROGRAM W/ PRIVATE CONTRACTOR	WALLACE	6/30/92	100%		0	0

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CHAMBER OF COMMERCE RECOMMENDATIONS STATUS
COSTS / SAVINGS DETAIL

3/19/93

REF #	TEAM	RECOMMENDATION	OWNER	FINISH	% COMP	NOTES	REF COST	REF SAV
45	CAPITAL PROJECTS	CAPITAL PROJECTS & MAINT DEPTS IN SAME LOCATION	WALLACE	6/30/94	20%		0	0
46	CAPITAL PROJECTS	COMBINE CAPITAL PROJECTS & MAINT UNDER FACILITIES DIRECTOR	WALLACE	12/30/94	80%		0	0
47	CAPITAL PROJECTS	CAPITAL PROJECT MGT BY FULL TIME CMS EMPLOYEES	WALLACE	12/30/93	100%		0	0
48	CAPITAL PROJECTS	SEPARATE MAINTENANCE AND CAPITAL PROJECTS RESPONSIBILITIES	WALLACE	1/31/93	100%		0	0
49	CAPITAL PROJECTS	ASSIGN LAND ACQUISITION CONTROL TO CAPITAL PROJECTS	WALLACE	1/31/93	100%		0	0
50	CAPITAL PROJECTS	UTILIZE C A D D FOR BUILDING RECORDS MAINTENANCE	WALLACE	4/30/93	90%		0	0
51	CAPITAL PROJECTS	ASSIGN CONSTRUCTION ACCOUNTABILITY TO CAP PROJECTS (VS FINANCE)	WALLACE	6/30/92	100%	R	0	0
52	CAPITAL PROJECTS	EXTEND DELEGATION OF AUTHORITY	WALLACE	6/30/92	100%	R	0	0
53	CAPITAL PROJECTS	ESTABLISH SPENDING LIMITATIONS BY POSITION	WALLACE	6/30/92	100%	R	0	0
54	CAPITAL PROJECTS	ESTABLISH A CAPITAL PROJECTS PURCHASING CENTER	WALLACE	6/30/92	100%	R	0	0
55	CAPITAL PROJECTS	PROJECT TRACKING SYSTEM FOR BUDGETS	WALLACE	7/30/92	100%		0	0
56	CAPITAL PROJECTS	PROJECT OWNERSHIP BY DEPARTMENT/PROJECT MANAGER	WALLACE	7/30/92	100%		0	0
57	CAPITAL PROJECTS	ESTABLISH AUDIT & PROCUREMENT PROCEDURES	WALLACE	6/30/92	100%		0	0
58	CAPITAL PROJECTS	COMPREHENSIVE FACILITIES PLAN	WALLACE	3/30/93	75%		0	0
59	CAPITAL PROJECTS	BUILDING UTILIZATION STUDY	WALLACE	1/31/93	100%		0	0
60	CAPITAL PROJECTS	PREPARE EDUCATION SPECIFICATION PER SCHOOL LEVEL	WALLACE	1/31/93	100%		0	0
61	CAPITAL PROJECTS	DEVELOP PREVENTATIVE MAINTENANCE PROGRAM	WALLACE	3/30/93	75%		0	0
62	CAPITAL PROJECTS	DEVELOP CONSULTANT SELECTION GUIDELINES	WALLACE	1/31/93	100%		0	0

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3/19/93

REF #	TEAM	RECOMMENDATION	OWNER	FINISH	% COMP	NOTES	REF COST	REF SAV
63	TRANSPORTATION	ESTABLISH 3 SATELLITE TRANSPORTATION FACILITIES	WALLACE	8/30/95	5%	B	0	1679000
64	TRANSPORTATION	RENOVATE CRAIG AVENUE TRANSPORTATION FACILITIES	WALLACE	6/30/95	5%	B	0	0
65	TRANSPORTATION	PERFORM VEHICLE MAINTENANCE ON SECOND SHIFT	WALLACE	1/31/93	100%		0	0
66	TRANSPORTATION	PERFORM FUELING & LUBRICATION CHANGES AT SATELLITE FACILITIES	WALLACE	9/30/95	0%		0	0
67	TRANSPORTATION	ASSIGN TRAINING RESPONSIBILITY TO ASST DIRECTOR	WALLACE	1/31/93	100%		0	0
68	TRANSPORTATION	ESTABLISH PERFORMANCE MEASUREMENTS & BENCHMARKS	WALLACE	8/1/92	100%		0	0
69	TRANSPORTATION	REDUCE WRECKERS FROM 3 TO 1 (CAN T SELL USED WRECKERS)	WALLACE	1/31/93	100%		0	0
70	TRANSPORTATION	REVISE TRANSMISSION FLUID CHANGES FROM 12K TO 24K MILES	WALLACE	6/30/92	100%		0	21000
71	TRANSPORTATION	CONTRACT OUT ENGINE COMPONENT REBUILDS	WALLACE	6/30/93	100%		0	13500
72	TRANSPORTATION	REDUCE TRANSPORTATION VEHICLE COST	WALLACE	6/30/93	50%		0	29500
73	TRANSPORTATION	IMPLEMENT "TIMS" (TRANSPORTATION INFORMATION MANAGEMENT SYSTEM)	WALLACE	9/1/92	100%		0	0
74	TRANSPORTATION	RADIOS NOT INSTALLED ON ALL BUSES	WALLACE	7/1/92	100%		0	0
75	TRANSPORTATION	ESTABLISH NON MONETARY INCENTIVE PROGRAM	WALLACE	8/1/92	100%		0	0
76	TRANSPORTATION	REVIEW STATE CONTRACT PRICES (E G ANTI FREEZE)	WALLACE	10/2/92	100%		0	0
77	TRANSPORTATION	ESTABLISH MAINTENANCE PROGRAM VIA EXTERNAL CONTRACT	WALLACE	6/30/93	0%		0	0
78	TRANSPORTATION	INVESTIGATE POTENTIAL FOR CONTRACTED PUPIL TRANSPORTATION	WALLACE	6/30/92	100%	R	0	0
79	TRANSPORTATION	INVESTIGATE INSTALLATION OF AUTOMATED BUS WASHERS	WALLACE	6/30/92	100%	R	0	46100
80	TRANSPORTATION	MAINTAIN WAREHOUSE VEHICLES AT CRAIG AVENUE FACILITY	WALLACE	6/30/92	100%		0	0

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REF #	TEAM	RECOMMENDATION	OWNER	FINISH	% COMP	NOTES	REF COST	REF SAV
81	CHILD NUTRITION	REASSESS LUNCH PERIOD DURATIONS SCHOOL SITE FUNCTION	WALLACE	6/30/92	100%		0	0
82	CHILD NUTRITION	DEVELOP NEW MENU SELECTIONS	WALLACE	6/30/92	100%		0	0
83	CHILD NUTRITION	EDUCATE PARENTS ON CHILD NUTRITION	WALLACE	6/30/92	100%		0	0
84	CHILD NUTRITION	DEVELOP A CHILD NUTRITION/SCHOOL ADMIN COMMUNICATIONS PROCESS	WALLACE	6/30/92	100%		0	0
85	CHILD NUTRITION	INSTALL POINT OF SALE SYSTEM TIED TO PURCH WAREHOUSE & ACCOUNTING	WALLACE	6/30/95	5%	B	0	0
86	CHILD NUTRITION	ESTABLISH A CHILD NUTRITION QUALITY ASSURANCE DEPARTMENT	WALLACE	6/30/92	100%		0	0
87	CHILD NUTRITION	DEVELOP A NEW SALARY STRUCTURE FOR HOURLY & MANAGEMENT POSITIONS	WALLACE	4/30/93	80%	B	0	0
88	CHILD NUTRITION	REDUCE FOOD TRANS COSTS VIA DROP SHIPMENT	WALLACE	6/30/92	100%	R	0	0

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REF #	TEAM	RECOMMENDATION	OWNER	FINISH	% COMP	NOTES	REF COST	REF SAV
89	SECURITY	RETAIN SPECIAL INVESTIGATIVE UNIT FOR SENSITIVE INVESTIGATIONS	WALLACE	6/30/92	100%		0	0
90	SECURITY	ELECTRONIC PROTECTION UNIT UPGRADES	WALLACE	7/1/95	30%	B	0	0
91	SECURITY	ELIMINATE ROVING PATROL UNITS	WALLACE	12/30/92	100%		0	500000
92	SECURITY	ASSIGN SCHOOL RESOURCE OFFICERS TO ALL JUNIOR/MIDDLE/HIGH SCHOOLS	WALLACE	6/30/92	100%		0	0
93	SECURITY	DEVELOP SAFETY AWARENESS PRGM EMPHASIZING INDIVID ACCOUNTABILITY	WALLACE	6/30/93	50%		0	0

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REF #	TEAM	RECOMMENDATION	OWNER	FINISH	% COMP	NOTES	REF COST	REF SAV
94	PRINTING & GRAPHICS	OUTSOURCE 4 COLOR PRINT JOBS	WALLACE	1/31/93	100%		0	0
95	PRINTING & GRAPHICS	REMOVE EQUIPMENT DEPREC CHARGE FROM BUDGET	WALLACE	6/30/92	100%	R	0	60000
96	PRINTING & GRAPHICS	ANNUAL BUDGET PROJ BASED ON SALARY BENEFITS & EXPECTED COSTS	WALLACE	1/31/93	100%		0	0
97	PRINTING & GRAPHICS	BUDGET MISC ACCOUNT FOR EXT REVENUES BASED ON PRIOR YEAR ACTUALS	WALLACE	1/31/93	100%		0	0
98	PRINTING & GRAPHICS	SEPARATE AUDIOVISUAL SALARY & EXPENSE BUDGET FROM PRINT SHOP	WALLACE	1/31/93	100%		0	0
99	PRINTING & GRAPHICS	REVIEW & REVISE FORMS CONTROL PROCESS	WALLACE MORRIS	12/30/94	5%		0	0
100	PRINTING & GRAPHICS	INSTALL FAX MACHINE IN PRINT SHOP FOR RUSH JOBS	WALLACE	10/1/92	100%		0	0
101	PRINTING & GRAPHICS	CONNECT PRINT SHOP TO CMS E MAIL SYSTEM	WALLACE	12/30/92	100%		0	0
102	PRINTING & GRAPHICS	CONVERT TEMPORARY EMPLOYEES TO PERMANENT (BINDERY OPERATIONS)	WALLACE	1/31/93	100%		0	0
103	PRINTING & GRAPHICS	REQUEST TEXTBOOK SHIPMENTS DIRECT FROM PUBLISHER TO CHARLOTTE	SALTRICK	5/30/93	100%	R	0	0

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REF #	TEAM	RECOMMENDATION	OWNER	FINISH	% COMP	NOTES	REF COST	REF SAV
104	INFO TECH	RENAME "DATA PROCESSING " TO "INFORMATION SYSTEMS"	MORRIS	10/31/92	100%		0	0
105	INFO TECH	ESTABLISH CHIEF INFORMATION OFFICER POSITION	MORRIS	8/12/92	100%		0	0
106	INFO TECH	INFORMATION SYSTEMS PROFIT CENTER	MORRIS	10/30/93	10%		0	0
107	INFO TECH	TRANSFER DEPARTMENT COMPUTER OWNERSHIP TO INFORMATION SYSTEMS	MORRIS	12/15/92	100%		0	0
108	INFO TECH	DEVELOP A COMPREHENSIVE CMS TECHNOLOGY PLAN	MORRIS	3/31/93	65%		0	0
109	INFO TECH	ESTABLISH INFORMATION SYSTEMS STEERING COMMITTEE TO SET PRIORITIES	MORRIS	12/31/92	20%		0	0
110	INFO TECH	EXPAND INFORMATION SYSTEMS END USER EDUCATION	MORRIS	6/30/93	5%	B	0	0
111	INFO TECH	ORGANIZE FUNCTIONALLY FOR ACCOUNTABILITY	MORRIS	12/31/92	100%		0	0
112	INFO TECH	STUDY DATA CENTER OUTSOURCING OR DOWNSIZING	MORRIS	6/30/93	100%		0	300000
113	INFO TECH	REVISE PROGRAMMER/ANALYST SALARY STRUCTURE	MORRIS	6/30/93	80%	B	0	0
114	INFO TECH	CONVERT CONTRACT PROGRAMMERS TO CMS EMPLOYEES	MORRIS	12/29/93	5%	B	0	400000
115	INFO TECH	DEVELOP NETWORK STANDARDS FOR SEAMLESS ENVIRONMENT	MORRIS	12/31/92	60%	B	0	0
116	INFO TECH	RE ENGINEER NEW & EXISTING BUSINESS PROCESSES	MORRIS	6/30/95	25%	B	0	0
117	INFO TECH	ASSIGN DATA AND APPLICATION OWNERSHIP TO END USERS	MORRIS	2/28/93	25%		0	0
118	INFO TECH	PROTECT VITAL DATA WITH DATA SECURITY SYSTEM(S)	MORRIS	12/30/94	15%	B	0	0
119	INFO TECH	REVIEW VITAL RECORDS & BACK UP PROCEDURES	MORRIS	4/30/93	100%		0	0
120	INFO TECH	ASSESS PRE PRINTED FORMS INVENTORY REQTS ASSIGN POINT OF CONTROL	MORRIS	2/28/93	5%		0	0

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REF #	TEAM	RECOMMENDATION	OWNER	FINISH	% COMP	NOTES	REF COST	REF SAV
121	FINANCE	UPDATE EXISTING FINANCIAL SYSTEMS	L ORANGE	6/30/95	0%	L	0	225000
122	FINANCE	ELIMINATE PAYROLL/HUMAN RESOURCES BARRIERS	L ORANGE	1/31/93	100%		0	0
123	FINANCE	SCHOOL ACTIVITY ACCOUNTS PLACED IN STATE CASH MANAGEMENT ACCOUNT	L ORANGE	1/31/93	100%		0	0
124	FINANCE	EMPOWER DEPARTMENT HEADS & PRINCIPALS TO CONTROL COSTS	L'ORANGE	12/30/92	100%		0	0
125	FINANCE	MODIFY BUDGET PROCESS TO REDUCE INEFFICIENT/CYCLICAL SPENDING	L ORANGE	1/31/93	100%		0	0
126	FINANCE	RENEGOTIATE TELEPHONE DIAL TONE SERVICE CONTRACTS	L ORANGE	9/8/92	100%		0	25000
127	FINANCE	INSTALL TELEMANAGEMENT SOFTWARE TO OPTIMIZE EQUIPMENT UTILIZATION	L ORANGE	4/30/93	50%	B	0	0
128	FINANCE	TRANSFER TELEPROCESSING TO INFORMATION SYSTEMS	L'ORANGE	6/30/94	0%		0	0

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REF #	TEAM	RECOMMENDATION	OWNER	FINISH	% COMP	NOTES	REF COST	REF SAV
129	SUPPLY SERVICES	INSTALL COMPUTERIZED PURCHASING SYSTEM	L ORANGE	6/30/94	5%	L	0	0
130	SUPPLY SERVICES	INSTALL COMPUTERIZED INVENTORY MGT & CONTROL FOR WAREHOUSE	L'ORANGE	12/31/93	60%	L	0	0
131	SUPPLY SERVICES	ELIMINATE EXTRANEOUS ACTIVITIES (STUDENT ACCIDENT INSURANCE)	L ORANGE	1/31/93	100%	R	0	0
132	SUPPLY SERVICES	PROACTIVE PURCHASING AGENT ROLE	L ORANGE	12/31/92	100%		0	0
133	SUPPLY SERVICES	VEHICLE MAINTENANCE AT CRAIG AVENUE BUS GARAGE	L'ORANGE WALLACE	4/30/93	100%		0	0
134	SUPPLY SERVICES	SMOOTH SEASONAL PEAKS IN PURCHASING & WAREHOUSE ACTIVITY	L ORANGE	6/30/93	80%		0	0
135	SUPPLY SERVICES	IMPLEMENT PERFORMANCE MEASUREMENT / RECOGNITION SYSTEM	L'ORANGE	3/31/93	80%		0	0
136	SUPPLY SERVICES	UPDATE PURCH WHS JOB DESCRIPTIONS W/ "VALUE ADD" EMPHASIS	L ORANGE	6/30/92	10%		0	0
137	SUPPLY SERVICES	AUDIT "LIMITED PURCHASE ORDER (<$500) " PROCESS	L ORANGE	12/31/92	100%		0	0
138	SUPPLY SERVICES	CHALLENGE STATE CONTRACT PURCHASE REQUIREMENTS	L ORANGE	1/31/93	100%		0	0
139	SUPPLY SERVICES	REVIEW ALTERNATIVES TO ADDING WAREHOUSE SPACE	L ORANGE	1/31/93	100%	R	0	0
140	SUPPLY SERVICES	ASSIGN INTER SCHOOL EQUIP MOVEMENT TO SUPPLY SERVICES	L ORANGE	1/31/93	100%	R	0	0
141	SUPPLY SERVICES	CONDUCT "LEASE/BUY EVALUATION OF DELIVERY VEHICLES	L ORANGE	4/30/93	30%		0	0
142	SUPPLY SERVICES	WAREHOUSE PERSONNEL CROSS TRAINING PROGRAM	L ORANGE	1/31/93	100%		0	0
143	SUPPLY SERVICES	JOB ENRICHMENT & SKILLS ENHANCEMENT FOR STAFF PERSONNEL	L ORANGE	1/31/93	100%		0	0

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144	HUMAN RESOURCES	DEVELOP A "MANAGEMENT/SUPERVISORY SKILLS" TRAINING PROGRAM	HOLLEMAN	6/30/95	50%		0	0
145	HUMAN RESOURCES	DEVELOP AN "EMPLOYEE DEVELOPMENT/POLICIES" TRAINING PROGRAM	HOLLEMAN	4/30/93	40%		0	0
146	HUMAN RESOURCES	INSTALL/EXPAND AUTOMATED SYSTEM FOR APPLICANT TRACKING	HOLLEMAN	6/1/93	10%	B	0	0
147	HUMAN RESOURCES	INSTALL/EXPAND AUTOMATED SYSTEM FOR PERSONNEL INFORMATION	HOLLEMAN	6/1/93	10%		0	0
148	HUMAN RESOURCES	INSTALL/EXPAND AUTOMATED SYSTEM FOR SUBSTITUTE CALL IN	HOLLEMAN	6/1/93	70%		100000	1100000
149	HUMAN RESOURCES	INSTALL/EXPAND AUTOMATED SYSTEM FOR EEO REPORTING	HOLLEMAN	6/1/93	10%	B	0	0
150	HUMAN RESOURCES	INSTALL/EXPAND AUTOMATED SYSTEM FOR EMPLOYEE PAYROLL	HOLLEMAN MORRIS	6/1/93	30%		0	0
151	HUMAN RESOURCES	RE FOCUS EEO AS PROACTIVE PRGM (AWARENESS TRAINING MANAGE CONSUL	HOLLEMAN	6/1/93	10%		0	0
152	HUMAN RESOURCES	DEVELOP A PERFORMANCE EVAL SYSTEM BASED ON OUTCOMES & BEHAVIORS	HOLLEMAN	6/1/95	10%		0	0
153	HUMAN RESOURCES	DEVELOP A "PAY FOR PERFORMANCE" COMPENSATION PROGRAM	HOLLEMAN	6/1/95	40%	B	0	0
154	HUMAN RESOURCES	FEASIBILITY STUDY OF FLEXIBLE BENEFITS FOR DAY CARE & MEDICAL EXPENSES	HOLLEMAN L'ORANGE	6/1/94	40%		0	0
155	HUMAN RESOURCES	OUTSOURCE THE EMPLOYEE ASSISTANCE PROGRAM	HOLLEMAN	8/1/92	100%		0	58000
156	HUMAN RESOURCES	STATUTORY CHANGE TO MANDATE CRIMINAL RECORD CHECKS * NOT REQUIRED	HOLLEMAN	1/31/93	100%		0	0
157	HUMAN RESOURCES	FINGERPRINT ALL APPLICANTS	HOLLEMAN	6/1/92	100%	L	0	0
158	HUMAN RESOURCES	CONTINUE APPLICANT DRUG TESTING	HOLLEMAN	6/1/92	100%		0	0

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159	COMMUNICATIONS	REORG DEPT AS "SCHOOL RELATIONS DEPT " & REPORT TO SUPERINTENDENT	CRAMER	9/1/92	100%		0	0
160	COMMUNICATIONS	ASSIGN VETERAN PUBLIC RELATIONS PRACTITIONER AS DIRECTOR OF DEPT	CRAMER	9/1/92	100%		0	0
161	COMMUNICATIONS	DIRECTOR S STAFF = PUBLIC AFFAIRS MGR + OMBUDSMAN + ADMIN ASSISTANT	CRAMER	1/31/93	100%		100000	0
162	COMMUNICATIONS	CONDUCT ANNUAL ASSESSMENT OF COMMUNITY & TEACHER ATTITUDES	CRAMER	6/30/93	100%		0	0
163	COMMUNICATIONS	PRODUCE INTERNAL SCHOOL EMPLOYEE MAGAZINE ON REGULAR SCHEDULE	CRAMER	2/28/93	90%		0	0
164	COMMUNICATIONS	LOCATE BOARD MEETINGS IN CITY/COUNT CHAMBERS	CRAMER	6/30/93	90%		0	0
165	COMMUNICATIONS	COMMUNICATE CMS STRATEGIES TO EMPLOYEES VIA WEEKLY ADMIN BULLETIN	CRAMER	1/31/93	100%		0	0
166	COMMUNICATIONS	ALIGN COMMUNICATION PLANS WITH SUPERINTENDENT S ACTIONS & INITIATIVES	CRAMER	9/1/92	100%		0	0
167				9/8/92	0%		0	0

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John A. Murphy
Superintendent of Schools

February 26, 1993

Mr Hugh Durden
Chairman, Operations Review Committee
Charlotte Chamber of Commerce
P.O Box 32785
Charlotte, NC 28232

Dear Hugh

Attached is a set of the interim reports prepared by the Chamber Operations Review teams between 11/92 and 2/93 There are eleven interim reports, covering the following CMS organizations

- Transportation
- Capital Projects
- Security
- Finance
- Supply Services
- Communications
- Printing and Graphics
- Organizational Structure
- Facilities Maintenance
- Human Resources
- Information Technology

At this time, interim reports are not available for

- Child Nutrition
- Custodial Operations

In addition to the summary data included in our report to the Steering Committee, these interim reports may also provide a more detailed assessment by the Chamber teams of our progress in implementing the recommendations

Sincerely,

Tom Morris
CMS Chief Information Officer

Charlotte
CHAMBER

December 3, 1992

Dr. John Murphy
Superintendent
Charlotte Mecklenburg Schools
PO Box 30035
Charlotte, NC 28230

Dear John:

The following teams have completed their interim reviews of the Operations Review implementation:

- Transportation
- Capital Projects
- Security
- Finance
- Supply Services
- Communications
- Printing and Graphics
- Organizational Structure

The following teams are in the review process:

- Child Nutrition
- Facilities Maintenance
- Custodial Operations
- Human Resources

Common Themes

Overall, the reporting teams are satisfied with the implementation process to date. However, there are some areas of concern which need immediate attention in order to facilitate completion of the implementation. Complete reports on each area are attached.

Organizational Analysis

The establishment of three management teams is 10% complete. This should be acted on immediately to gain principal "buy in" on the restructuring of responsibilities. The lack of progress in this area is seriously impeding other organizational analysis recommendations related to resource allocation.

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A decision also needs to be made on revision of the vehicle allowance policy. We recommend that the CMS owned fleet of cars be eliminated and replaced with either a car allowance or direct mileage reimbursement at June 30, 1993 year end.

Capital Projects

A Facilities Director position has been allocated, but not filled. This should be accomplished as soon as possible to facilitate the improvement of the Capital Projects division to make timely decisions and to process change orders, budgets, schedules and project completion.

Communications

Teacher morale is an important factor in the public image of the school system. Efforts need to be made to build support among teachers for the changes at hand within the system.

Security

Efforts need to be accelerated to obtain finger print searches on a national level to insure some degree of protection from out of state applicants who may have criminal backgrounds.

We will be pleased to convene a meeting for you to meet directly with the team leaders at your convenience. Please do not hesitate to contact me with any questions you may have. Deborah Pinchak is continuing to work with our team leaders to collect the outstanding reports.

Sincerely,

Hugh Durden

HD/cmc

Attachment

cc: Dave Stovall
Deborah Pinchak
Carroll Gray

Duke Power Company
Wachovia Center
P.O. Box 1007
Charlotte N.C. 28201 1007

DUKE POWER

February 23, 1993

Mr. Brian Cawley
Charlotte-Mecklenburg Schools
P.O. Box 30035
Charlotte, NC 28230

Dear Brian:

Enclosed is the summary of the Facilities Maintenance Team's follow-up session that was coordinated earlier this year.

Please contact me if you have any questions or if I can be of further assistance.

Sincerely,

L. G. Goodman, III, P.E.
Engineering Supervisor
Corporate Facilities

LGG/lrp

Enclosure

cc: Georgia Fisher
Dan Phillips
Tripp West

FACILITIES MAINTENANCE RECOMMENDATIONS REVIEW

Members of the Facilities Maintenance Team reviewed the original recommendations provided in the CMS Operations Review Report with Calvin Wallace. We were extremely satisfied with the results from our follow-up session and believe that significant progress is being made. We found Mr. Wallace to be very positive toward the value of the recommendations that have been either implemented or scheduled and/or budgeted to be implemented in the near future. Based on feedback from both principals and facility occupants, the Maintenance organization has already achieved some improvement in their "customer satisfaction" from some recommendations implemented thus far.

To recap the status of our original recommendations or opportunities for improvement, we began with "definitions" on page 10 of our original report. We recommended that their Mission Statement be redefined and that routine maintenance, renovations, emergencies, and maintenance parts all be defined. All of these items have been completed in an internal document and have been distributed throughout the organization and to the schools.

The following is a brief summary of the recommended actions and current status:

- The Facilities Maintenance Operations Review Team (FMORT) recommended organizational alignment to better meet customer needs. This would require re-evaluation of current management and supervision against written goals and responsibilities. This would also require increased responsibility and authority of supervision to control work flow, priorities, budget, personnel, etc. Also, re-evaluation of maintenance processes and system coverage is necessary.

  STATUS: The organization structure recommended by Mr. Wallace should provide better control and maintenance management. Utilizing ten (10) Operations Coordinators to manage an approximately equal number of schools is a step in the right direction. These positions are currently being advertised with clearly defined job definitions. Regional assignments and dividing of PM and major repair responsibilities will provide improved service to schools and more effectively utilize existing personnel.

- The FMORT recommended that several staff members be added. These additions included a horticulturist/turf specialist, a project planner/scheduler, at least two (2) HVAC specialists, an environmental engineer, and an energy management/electrical engineer.

STATUS: All positions have been submitted with the new budget, pending approval in February 1993. The FMORT re-emphasizes the importance of adding this staff in order to ensure the long-term success of the Operations/Maintenance organization.

- A major topic of discussion during the review was outsourcing. At the time of the Operations Review, very little outsourcing was being utilized. It was recommended that the Facilities Maintenance Department evaluate the cost of their services versus outsourcing. The FMORT also recommended that some specialty services such as pest control, turf care, painting, portable classroom relocations, and roof repair be considered for outsourcing.

  STATUS: At the time of our follow-up session, request for proposals (RFPs) had been sent out for painting, turf care, pest control, and portable classroom relocation to obtain data for comparison with "in-house" services. Thus far, the only proposals received have been for painting and a determination has been made to use a combination of "in-house" and "out-of-house" resources during the 12-week period school is out during the summer. Painting schedules during the remainder of the year will be shifted to after-school time schedules. Also, all roof crews have been dissolved and roof repair is being outsourced. This personnel has been reassigned to other maintenance responsibilities. Overall, good progress is being made with the evaluation and implementation of outsourcing.

- The FMORT suggested that a review and analysis of the existing Maintenance Organization salary structure be performed to ensure consistency and competitiveness with private industry.

  STATUS: The CMS Human Resources Department is currently reviewing and results/recommendations will be available prior to the February 1993 budget approval.

- Capital Projects and Facilities Maintenance should be located within the same facility and report to the same manager.

  STATUS: The Facilities Maintenance and Operations personnel are presently all located at the new Stafford Drive facility. Upon completion of the next building phase, the Capital Projects organization will be relocating.

- The FMORT recommended the Facilities Maintenance working hours be changed to 10:00 a.m. to 6:30 p.m. Maintenance employees should be able to spend more time on actual task work with fewer interruption from principals and teachers. The recommendation would cost the CMS system no additional money and can be implemented at any time.

STATUS: Mr. Wallace is currently evaluating the benefits and practicality of implementing this recommendation. One concern being discussed was having too many vehicles going home. Mr. Wallace was very receptive to the idea and will continue to pursue its implementation.

- The implementation of a Computerized Preventive Maintenance Program, including development of task checklist that can be audited, was recommended by the FMORT. Potential savings of $250,000 to $500,000 should be realized through extended equipment life.

  STATUS: Heery International, management information system consultants, have been retained to provide a Preventive Maintenance Program. We are very enthusiastic about this approach as PM will ultimately protect capital investment, prolong mechanical and electrical equipment, and produce significant energy savings.

- To resolve the image problem, the FMORT recommended leasing uniforms for Facilities Maintenance personnel. Presently, Maintenance personnel do not wear uniforms and have an image problem in the eyes of the school system principals.

  STATUS: Mr. Wallace supports this recommendation and would like to see it implemented. Funds to cover uniforms expense ($90,000) have been requested for hourly employees in the Betterment Category.

- The FMORT recommended that Facilities Maintenance charge back schools, or sites, for labor and materials for non-routine maintenance request items. Also, it was recommended they evaluate their policy with respect to performing non-routine maintenance procedures for the schools.

  STATUS: With the ten (10) new people to be hired as Operations Coordinators, schools will be charged back for labor and materials for non-routine maintenance request items. These additional personnel will also provide improved service to schools.

- The FMORT recommended setting up satellite parts housed for maintenance supplies. During interviews, supervisors estimated that 50% of technicians' time was spent traveling back to the maintenance facility for parts not typically stocked on CMS maintenance vehicles.

  STATUS: Mr. Wallace and his staff have evaluated this concept and discussed it at length. At this time, they have not found a way to implement this recommendation. More thought needs to go into this as it will be hard to implement and may not be practical.

- The purchase and utilization of SLICE horticultural software system, by Thornton Computer Systems, was recommended by the FMORT to assist in managing and planning the strategy to upgrade the level of landscape maintenance of the school properties.

  Unless a qualified leader with proven horticultural and turf maintenance expertise can be hired, the FMORT recommended that mowing, seeding, and fertilization be contracted out.

  STATUS: The purchase of SLICE and trained horticultural personnel have been included in the budget for 1993. Job costing, inventory control, bidding and estimating, and budget preparations can then be tracked.

- The development of an Energy Management Program was recommended by the FMORT. Engineering economic analysis can be performed to show savings versus capital costs in order to save significant dollars.

  STATUS: Approval for funding is pending in 1993 budget, per Mr. Wallace.

- The FMORT recommended purchasing an on-line work order generation and management system. The efficiencies that may be realized from a quality automated project scheduling and preventive maintenance system can be significant.

  STATUS: According to Mr. Wallace, CMS is currently upgrading their existing system; they have electronic transmission. They need one piece of software to code work orders.

CAPITAL PROJECTS

ORGANIZATION:

Reference 45: Locate the Capital Projects Department and the Maintenance Department together - This is in progress *Currently a new building to house the* Capital Projects Department is in schematic design with occupancy scheduled for July 1994 This building is to be located adjacent to the existing Maintenance Department.

Reference 46· Combine Capital Projects and Maintenance under Facilities Director - Authorization for this new *position has been given, but has not been filled*

Reference 47: Capital Projects managed by full-time CMS Employees - This has been approved and will go before the Board for approval by 1/1/93

Reference 48 Separate Maintenance and Capital Projects Responsibilities - This plan has been *implemented*

Reference 49. Assign Land Acquisitions Control to Capital Projects - This has been done.

Reference 50. Utilize C.A D D. for Building Records - This has been approved and a requisition to purchase additional equipment has been sent to Finance. The upgrade should be on-line by the end of the first quarter of 1993

Reference 51 through 54:

- Assign construction accountability to Capital Projects.
- Extend delegation of authority.
- Establish spending limitations by position.
- Establish Capital Projects a purchasing center.

At present, none of the above recommendations have been approved This is one of the most important changes that is needed in order for the Capital Projects division to have control of the

work for which they are responsible Without a policy in place which will allow for timely decision making and processing of changes, budgets, schedules, and project completions are at nsk.

These recommendations must be addressed as soon as possible as the school system is beginning an aggressive building program.

Reference 55· Project Tracking System for Budgets - A system has been put in place which appears to be providing current and accurate information on each project to management

Reference 56· Project Ownership by Department Project Managers - Although this group is willing and eager to take ownership of the responsibility of project administration, until they are given the proper authority required to make decisions and commitment on behalf of the School Board, the full impact of this recommendation will not be realized

Reference 57: *Establish Audit Procedures - This is in place and* each project is reconciled with the Finance Department on a monthly basis

Reference 58. Comprehensive Facilities Plan - This is on-going and is scheduled for completion 1/1/93, projected through the year 2002.

Reference 59. Building Utilization Study - This has been completed The results of this study have identified two properties which are recommended to be disposed of, and two properties which should be renovated and reutilized as classrooms.

Reference 60: Prepare Educational Specifications per School Level - This is in progress Currently they have completed an Educational Specification for elementary and middle schools. They currently need to complete this for senior high schools. They do not feel that an Educational Specification can be developed for magnet schools since each school is unique and special.

Reference 61: Develop Preventative Maintenance Plan for existing and new Facilities - This is in progress and is being performed by Herry International.

Reference 62: Develop Consultant Selection Guideline - The Board policy has been rewritten and will go to the Board for approval by 1/1/93.

(OBY

November 25, 1992

Hugh Durden
Charlotte Chamber
129 West Trade Street
Charlotte, N.C. 28232

Dear Mr. Durden:

With reference to your letter of October 30, 1992, the following is noted as a follow-up to the Charlotte-Mecklenburg School CMS Security Report. You may wish to forward these comments to the CMS officials who may have an interest.

The security items noted in the attachment to your referenced letter are being addressed with some manifestation of success. The item of current interest to my team is the CMS applicant fingerprinting process.

We understand that fingerprinting is being handled by the Human Resources Division (HR) CMS, possibly under contract to an outside firm. Ms. Jan Richardson, HR CMS, advised that she is processing applicant fingerprint cards through the State Bureau of Investigation in Raleigh, N.C. This will give the CMS a state-wide search, but this process will not give the CMS a national search of criminal fingerprint records. As you know, only a national search of criminal fingerprint records will give the CMS some degree of protection from out-of-state applicants who may wish to hide past criminal acts.

An example of efforts in another state resulted in an amended code in Virginia relating to criminal record searches of school board's employees. Chapter 791 of the Virginia Acts of Assembly, paragraph 22.1-296.2, now reads as follows, "Fingerprinting required. - As a condition of employment, the school boards of the Counties of Chesterfield, Fairfax, and Prince William and the Cities of Alexandria, Manassas, Radford, and Richmond shall require any individual who accepts a position after July 1, 1989, to submit to fingerprinting and to provide personal descriptive information to be forwarded along with the applicant's fingerprints through the Central Criminal Records Exchange to the Federal Bureau of Investigation for the purpose of obtaining criminal history record information regarding such applicant."

The FBI in their March 5, 1992 letter (see appendices of the February 28, 1992 CMS Security Report), page one sets forth suggested language for modification of PL 92-554. Page two of the March 5, 1992 FBI letter also provides information concerning the requirements for the modification of PL 92-544 which will allow CMS fingerprint cards to be processed by the FBI for national criminal history records information for CMS applicants.

The CMS should continue to strive toward a modification of PL 92-544 in order to have the ability to request the FBI to conduct a national search of CMS applicants. This will assist in protecting the CMS from hiring out-of-state personnel with prior, undesirable criminal records.

In addition, the HR, CMS apparently is determining how many out-of-state applicants have been processed for employment. This data will assist in determining the CMS precedence for an amendment to the state code. We believe that the results will confirm the need to continue to support the efforts to amend PL 92-544 or propose new legislation resulting in the same result.

The CMS may also wish to suggest to their legal department to determine a standard of care and the negligence issues involved in hiring for positions of public trust in the CMS system. This could also assist in the development of a fixed policy for hiring when the result of a fingerprint search is questionable. In other words, what type of charges, violations of law, etc. would eliminate an applicant from a job position. This will support the CMS defenses against any negligence suits encountered as the result of an employee's actions when the screening process could be under attack for allowing an individual with a prior criminal record to enter the employment of the CMS system.

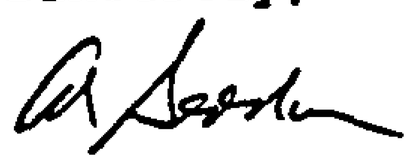
The cost of the fingerprinting can be dealt with by having a potential employee agree that the cost of the fingerprinting could be deducted from the employee's initial paycheck. The cost for those applicants whose prints reveal past criminal activity could be paid for by the CMS system. A $24.00 fingerprint search fee is "low-cost insurance" to avoid a greater potential risk at some future date.

The other recommendations listed as "89" through "93" on the status sheet, attached to your referenced letter, seem to be moving toward a scheduled completion date.

Drug testing appears to be a standard practice. Computer security apparently is included in the computer study. Therefore, only the finalization of a fingerprinting process remains as a security priority for the CMS.

If you have questions concerning the above, please contact me at (704) 386-1327 or the other member of our team, Tony Tucker at (704) 334-4751.

Sincerely,



Al Seddon

Charlotte
CHAMBER

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CC Brian Cawley
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December 17, 1992

Dr. John Murphy
Superintendent
Charlotte-Mecklenburg Schools
P.O. 30035
Charlotte, NC 28230

Dear John:

Enclosed, please find the interim report for the Operations Review in the area of human resources If you have any questions, please do not hesitate to contact either myself or Deborah at 378-1354.

Sincerely,

Hugh

Hugh Durden
Chairman, Operations Review

HD/djr

cc: Tom Morris

Enclosure

Hoechst Celanese

Post-it™ brand fax transmittal memo 7671	# of pages ▶
To Deborah Pinchak	From Betty Weikey
Char. Chamber	Co. HCC
Dept.	Phone # 554-2830
Fax # 374-1903	Fax # 554-2056

Hoechst Celanese Corporation
PO Box 32414
Charlotte, NC 28232-8085
704 554 2000

December 9, 1992

Ms. Deborah Pinchak
Vice President Education
Charlotte Mecklenburg Chamber
129 West Trade Street
Charlotte, NC 28202

Dear Deborah:

The Charlotte Mecklenburg Schools Human Resources Department has made excellent progress against the recommendations made by our review team. I met with Dr. Holleman and members of her staff on December 4 to review specific action items, and the results are summarized below.

It appears at this time that only one items needs further support from the review team, that of proposing a more effective role of the EEO function, consistent with the CMS mission and objectives. The team's recommendation was that the EEO role be refocused in a more proactive consultative role. The review team will assist by further defining how EEO functions generically have evolved compared with CMS, where the role now fits in other organizations, and by helping to draft an appropriate position description.

Regarding the other review team recommendations, the following is a brief summary of accomplishment:

1) Training -- A number of training initiatives have been implemented toward an overall objective of a 5-year program for skills improvement and self-development for all CMS employees, based on job requirements. The training effort is progressing despite the fact that funding of $50,000 was not granted as requested to accomplish some objectives. There is insufficient staff to meet all the needs. They are able to plan, but not deliver programs without money for either additional training staff or outside consultants, or a combination of the two.

2) Automated Systems -- CMS has hired Tom Morrison, an early retiree from IBM, to address the systems needs identified

Hoechst

in the audit. These included, but should not be limited to, applicant tracking, personnel information, substitute teacher call-in, EEO reporting, and payroll systems. The substitute call-in program is developed and ready to implement as soon as it is approved.

Commitment and funding for these projects are there. Analysis and design are progressing according to schedule.

3. Performance Evaluation System and Pay-for-Performance Evaluation System -- These two items have been linked because the latter cannot exist without the former. A compensation specialist had been hired and had just begun work as the audit team was completing its work. Work is continuing on schedule.

4. Flexible Benefits for Day care and Medical Expenses -- A new benefits specialist has been hired and the department is being reorganized. Studies of benefits improvements are progressing toward the proposal stage.

5. Employee Assistance Program-- The EAP has been outsourced to Presbyterian EAP, resulting in the availability of broader services for both CMS employees and family members.

6. Safety and Workers Compensation -- The Safety function has been moved to Auxiliary Services, where it can provided needed focus on training and delegating accountability for a safe work environment down through the entire CMS organization.

   A staff member has been add to focus full time on Workers Comp from the standpoint of loss prevention and loss control. New investigatory procedures have been implemented and a new "Return to Work" policy is proposed. Relationships with the medical community are being developed as resources to provide input to position descriptions and help determine physical capabilities upon returning to work.

7. Fingerprinting and Drug Testing -- Both programs have been implemented and apply to all new hires.

In summary, the Human Resources staff continues to be dedicated to quality, teamwork, and customer service. The fact that all of the above accomplishments were achieved while the school system was undergoing major transition to magnet schools and middle schools, requiring restaffing, numerous teacher transfers and the hiring of more than 1400 new employees, is remarkable.

We will continue to work with the Human resources staff as needed, and in particular in addressing the questions surrounding appropriate utilization of the EEO function.

Please call me if you have any questions at 554-2830.

Best regards,

Sincerely,

Elizabeth P. Dickey

REPORT ON CMS OPERATIONS REVIEW

IMPLEMENTATION

(Organization Analysis Subcommittee)

This review was conducted between November 16th and 24th, 1992, by Frank Spencer, subcommittee chairperson. Meetings were held with Julio George, Dan Saltrick, Calvin Wallace and Hilton L'Orange. The opinions expressed are Mr. Spencer's, not the Chamber of Commerce or the other members of the subcommittee. The numbering system corresponds to the attached flow chart prepared by Charlotte-Mecklenburg School System.

Recommendation 1 - Establish three management teams (SMT, LMT, FMT) - Julio George is leading a task force of principals from all three levels to address this aspect of reorganization. He reports that they are 10% into this project. There are benefits to this approach in terms of buy in and ownership for the principals. However, the delayed implementation raises some concerns in that other policy decisions are being made without the management teams in place. Therefore, the principals may feel ownership of the new organizational structure, but may not feel ownership of the change to school based management

Dr. Murphy is currently meeting semi-weekly with all principals, grouped as secondary, middle and elementary. This practice would seem to be inefficient on the middle school and elementary level. I urge CMS to accelerate the completion of the management team structure. A projected completion in early 1994 seems a year too late. Dr. Saltrick and Ms. Holleman should be included in this process with the goal of consistent implementation by March 31, 1993. (See #6,7, and 8 below.)

Recommendation 2 - Reorganize the Facilities Department - Calvin Wallace is leading reorganization of this function. He reports approximately 40% completion which appears accurate. He has decided to create an additional position, Director of Operations, which will manage the Facilities Specialists and report to a new Coordinator of Facilities. None of these new positions have yet been filled although the Coordinator, the Director and six facilities specialist positions have received budget approval.

The training program to move custodial personnel to a higher skill level and into a site engineer position on campus is in place Likewise, Mr Wallace reports that the maintenance Department is working to exit the construction business Both of these steps are essential to implementation of the committee's recommendations Philosophically and tactically, the progress is good.

A few areas of concern remain First, the sooner the facilities coordinator can be hired, the better. That person needs to have a hand in the change process. Second, the custodians still report to the principals. Once the facilities specialists are in place, this should be changed. Third, knowing that facilities needs will be critical over the next 20 years, CMS should develop a means of working with Mecklenburg County to consider long term leases as an alternative to building. Mr. Wallace is fully aware of this final comment but will need board level support for implementation.

Recommendation 3 - Employ one external and one internal consultant to assist the transition to school based management - Julio George reports that various external consultants are available to principals as requested. No internal coordinator/consultant for this process has been appointed. There appear to be no plans to do so. The availability of several outside experts is positive. However, with no one inside charged with directing this change process,

CMS runs the risk that implementation will be inconsistent and future disparity will cause discord. CMS should move immediately to appoint the internal consultant whose only responsibility through 93-94 is the administrative change process.

Recommendation 4 - Petition State Budget Department for funding without constraints - Julio George reported that the blueprint has been developed and submitted to the state. To improve the chances of success, Dr. Murphy should request that the Chamber of Commerce organize and lead a concerted lobbying effort in Raleigh.

Recommendation 5 - Replace Southern Association accreditation with Effective Schools Framework - Julio George reported that this was complete as of October, 1992.

Recommendation 6, 7 and 8 - These deal with the concept of resource allocation within the campus boundaries - Dan Saltrick reported that the school is implementing these recommendations through the use of school improvement plans prepared by each principal for her school. These will be updated annually. Four instructional facilitators who report to Mr. Saltrick are primarily responsible for training and advising the principals in this process but do not eliminate the need for the internal consultant discussed in #3 above.

Specific training for the principals is conducted in monthly sessions and in a longer retreat period during the summer. This is positive. However, the large group format usually employed seems to limit feedback.

The instructional changes Dr. Saltrick is pursuing are tied closely to the administrative changes which were recommended in #1 above. CMS should move quickly to implement #1 so as to provide the small group, collegial support for principals throughout the transition. Dr. Saltrick and Ms Holleman should be brought into the process to work with Mr.George to insure a quick and consistent implementation.

Recommendation 9, 10, 11, 12 - Revise vehicle allowance policy - Hilton L'Orange and Calvin Wallace have committed philosophically to the elimination of all CMS owned cars. Staff would either receive a car allowance or direct mileage reimbursement. They have not yet set a date for implementation. I suggest it occur at this fiscal year end, June 30, 1993. The idea of selling the fleet to employees based on blue book value was discussed as a possible means of easing the transition for those employees currently driving CMS cars

December 1, 1992

Deborah Pinchak
Fax 374-1903

SUBJECT: CMS - Transportation

We have reviewed status of progress related to Pupil Transportation area. Findings are as follows:

Ref. 63 - Progress is underway - satellites are planned at Wilkinson Blvd. Training Center Site and at Craig Avenue. This would allow partial implementation of recommendations related to satellites.

Ref. 64 - Craig Avenue renovations are planned to allow satellite location. Delays in opening added maintenance facility - completed several months ago - are delayed related to relocating a fire hydrant/back flow valve.

Ref. 65 - Vehicle Maintenance on second shift relates primarily to satellite operations. Should implement with satellite operations.

Ref. 66 - Vehicle Maintenance on second shift relates primarily to satellite operations. Should implement with satellite operations.

Ref. 67 - Additional training responsibility has been assigned to the Assistant Director.

Ref. 68 - Measurements and Benchmarks - Some measurements have been developed/used - Accident Rate Goal - On-Time Performance - Mechanical Related Breakdowns - Efficiency Rates - These are good but should be reviewed to determine if best for what is required, and shared with Transportation Employees and Customers, Principals, Teachers, Etc. Benchmarking would best be a comparison of "best practices" with other school districts in the state, country, and bus contract services.

Ref. 69 - Reduce wreckers - Garage feels 3 wreckers are required. There is no incentive from state to reduce or turn-in - OK with us, but may wish to consider contract wrecker service for areas remote from Craig Avenue - Director's call.

Ref. 70 - Transmission Fluid - Partially implemented. Intent to implement except for buses with problem transmissions.

Ref 71 - Contract out engine components and transmission rebuild. Investigating - relates to attrition and reduced mechanics to justify.

Ref. 72 - Reduce CMS vehicles driven home at night. Understand some has been accomplished in other CMS areas. We feel Director, Assistant Director, and Specialists should drive assigned vehicles home at night based on business need. Some reduction should be addressed related to all mechanics driving vehicles home - maybe have a few on call which is rotated. Other departments should review business need and reduce where practical, or charge for personal miles.

Ref. 73 - TIMS - TIMS with Specialist assistance now routing majority of students - system had to work with new magnet schools. Still some improvements to system but good considering magnitude of job.

Ref. 74 - Radios - Not installed and we agree with current situation not required.

Ref. 75 - Non-Monetary Incentive Program - submitted, approved, but not funded.

Ref. 76 - Review State contract prices - reviewed but little change.

Ref. 77 - Maintenance Program via external contract - Probably should be done as a future benchmark but N.C. State Regulatory direction causes concern - not a high priority item but should be reviewed in 3-5 years.

Ref. 78 - Contracting Pupil Transportation. Presently done for over 100 handicapped students and best in these cases.

Ref. 79 - Automated Bus Washers - related to satellite facilities and should be considered financially and environmentally as plans develop.

Ref. 80 - Maintain Warehouse Vehicles - Not implemented but in long-range plans.

SUMMARY

Magnet Schools have increased demands on Pupil Transportation Group. Approximately 45 buses have been added and about 6000 more miles per day. Twelve new schools have been opened while work force remains stable. Earlier we identified Transportation specialists as critical for pupil transportation, safety, and driver training and motivation. These positions have been reduced from twelve to ten with some specialist have direct reports as high as 88 employees, and 14 schools. From our investigations, we feel these specialists are stretched, and "pupil" service and safety could suffer. Considering the recent changes related to magnet schools, we feel excellent progress has been made in reviewing and implementing recommendations in a timely manner.

The Charlotte Observer

600 S Tryon St P.O Box 32188 Charlotte, N C 28232 (704) 358-5000

November 24, 1992

Ms. Deborah Pinchak
Charlotte Chamber of Commerce
129 West Trade Street
Charlotte, North Carolina 28232

Dear Deborah Pinchak:

I met with Calvin Wallace on Monday, November 23, to follow up on the recommendations made in the Operational Review of CMS departments. I am pleased to report progress is being made on all ten recommendations. Below is a recap.

1. The Print Shop has developed a relationship with an outside printer, Pictorial Engraving, and bids jobs three to four times a year to compare costs.

2. The department will recommend that the annual depreciation of $60,000 be removed from the budget.

3. The projected salary to benefit accounts will be budgeted based on actual experience.

4. The revenue accounts will also be budgeted based on past performance. Through six months, the department has booked $100,000 in revenue.

5. The department will recommend Audiovisual expenses be separated from Print Shop expenses.

6. More work is required by the "forms committee" to establish an efficient process and control inventory. A Print Shop representative as well as representative user groups should be part of the committee. Currently no member of the Print Shop is on the "forms committee."

7. A fax machine was purchased.

8. The Print Shop is on the electronic mail system.

9. The department will recommend the two temporary positions be upgraded to full-time positions. The department has made this request the last three years.

10. The textbook purchasing function is not a Print Shop function. It has been assigned to Media and Technology Services.

The CMS budget year is from July 1 through June 30. All of the recommended budget changes are being submitted for the budget that takes effect July 1, 1993.

Let me know if you have any questions, or if additional follow-up is required.

Sincerely,

Robert F. Burns
Vice President/Operations

RFB:js

c: Calvin Wallace

Epley Associates, Inc./Public Relations

Charlotte/Raleigh
P.O. Box 11526
Charlotte, NC 28220-1526
Office 704/522 1220
Facsimile 704/522 1184

November 30, 1992

Mr. Hugh Durden
% Deborah Pinchak
Charlotte Chamber of Commerce
P. O. Box 32785
Charlotte, North Carolina 28232

Hugh:

As per your request of October 30th, the Communications Committee has conferred with Kit Cramer at the Charlotte-Mecklenburg School system. We feel that she is making good progress with the reorganization of the School Relations Department and in getting favorable news coverage for the system. We see good progress being made in accomplishing the objectives suggested in the Operations Review.

We are concerned about the reports of poor morale by school teachers. While morale is an internal leadership responsibility, teacher morale has a major impact on public confidence in the school system. It can also impact public sentiment on future bond issues. For Dr. Murhpy's vision to succeed, the teachers need to be 100% with him. Management dictates will not build that support.

We suggested to Ms. Cramer that a teacher attitude survey be conducted immediately to measure the extent and intensity of teacher attitudes, to serve as a bench mark, and to give guidance for management decisions. The committee has offered to advise the CMS in this area because we believe that strong public support cannot be maintained if a key ingredient in the school system is not in sync with management. It is our opinion that this is the systems biggest "public relations" and internal relations problem.

If you have any additional questions, please call.

Cordially,

Joe S. Epley, APR
President

JSE/lb

xc: Bob Shaffer, APR
Ms. Kit Cramer
Dr. John Murphy

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CMS OPERATIONS REVIEW
SUPPLY SERVICES DEPARTMENT

INTERIM PROGRESS ASSESSMENT
11/19/92

This update was prepared based on a progress review held on November 19, 1992 at the Education Center. Participants in the review were Paul Nodtvedt and Steve Sillay (members of the original Operations Review Team) and Jim Graham, Barbara Strickland and Hilton L'Orange (part-time) from CMS.

Summary

Of the 16 recommendations made by the Operations Review Team, 15 have been "accepted" by the Supply Services Department and 1 has been transferred to the Information Systems Department. Measurable implementation progress appears to have been made on 5 of the recommendations:

#1 Work has been done to identify an appropriate automated procurement system. Funding such a system will be a significant obstacle.

#6 Money was made available this spring to allow some early purchasing and deliveries, resulting in a more manageable supply and distribution workload over the summer.

#10 The Maintenance and Transportation depts. have been audited. An audit of the schools and other depts. is scheduled for December.

#11 Recommendations for change have been made and included in a comprehensive list of "statutes to be challenged", to be taken forward for review in the '93 legislative session.

#15 Additional cross-training of drivers and warehouse workers is taking place.

While the other recommendations have been reviewed and discussed to some extent, measurable progress in their implementation was not evident. In some cases, only limited progress is possible until the appropriate funds are allocated in the budgeting process for the next school year.

Key Issues/Obstacle to Further Progress

Several observations were made regarding the outlook for further progress:

1. The lack of quantitative (ie. $'s saved) justification attached to the key recommendations will hamper their chances of being funded. In the case of the systems automation

CMS OPERATIONS REVIEW - INTERIM PROGRESS ASSESSMENT (CONT'D)

recommendations, it would appear that the new Chief Information Officer needs to lay out a long term plan incorporating all the recommended systems work, including the cost savings in total, and seek approval for such a strategy. Attempting to cost justify the pieces independent of one another will be difficult.

2. A number of the recommendations made by this team were geared not so much to saving dollars per se, but rather to enabling CMS personnel to add more value to the operation. This sort of benefit, and hence the implementation of these changes, will likely take a back seat at least in the near term to the immediate cost reduction resulting from implementing recommendations in other areas.

3. The current overload of the Information Systems department with requests emanating from the overall Operations Review will result in slow progress on a number of these recommendations. It does not appear that any clear prioritization has been established yet.

4. The number of significant changes going on within the school system has been and will likely continue to be a challenge to CMS personnel's ability to keep the implementation of the Operations Review recommendations very high on the priority list.

Paul J. Hodtvedt
Team Leader

CAROLINAS

CAROLINA MOTOR CLUB

720 E. Morehead St P O Box 30008 Charlotte NC 28230-0008, 704/377-3600 FAX # 704/342-0087

November 23, 1992

Ms. Deborah Pinchak
Vice President, Education Department
Chamber of Commerce
129 West Trade Street
P.O. Box 32785
Charlotte, N.C. 28232

Dear Deborah:

In accordance with Hugh Durdens' instructions of October 30, I have reviewed with Hilton L'Orange, chief financial officer of the Charlotte-Mecklenburg School System, his departments' progress in implementing the recommendations made by the task force. The following summarizes the results of that conversation.

UPDATE EXISTING FINANCIAL SYSTEMS

The school system has and will continue to evaluate and update existing financial systems within availability of funds. A request for funding will be included in the 1993-94 Budget Request to update CMS' financial systems (this will include general ledger, accounts payable, and a report writer). In conjunction with this, requests are being prepared to address the impact of UERS on CMS' financial systems. As indicated in the Efficiency Report, the savings are predicated on the State reducing these requirements.

ELIMINATE PAYROLL/HUMAN RESOURCES BARRIERS

The staff of both the Payroll and Human Resources Departments understands the importance of cooperative efforts in ensuring the timely and accurate payment of employees. They believe that the key to success in their cooperative endeavors is effective, interpersonal relations. An ad hoc committee composed of employees from both departments are meeting on a periodic basis to ensure smooth, continuous, responsive two-way communications between the departments. This of course will be an ongoing project.

SCHOOL ACTIVITY ACCOUNTS PLACED IN STATE CASH MANAGEMENT ACCOUNT

Per Mr. L'Orange, the Efficiency Report contained a misunderstanding. Local school units can participate in the State Cash Management account through the CMS Cash Pool, which historically has had higher rates of return than other investment alternatives available to the schools. Individual schools cannot participate directly in the State account as this is strictly an investment account (30-60 day deposit of funds, with deposits and withdrawals in large dollar lots), not a checking account. Individual schools use local branch banks near their school location to facilitate daily banking transactions. Procedures and internal controls for these accounts are established and monitored by the Accounting Department. Annual audits of the funds are conducted by the department in accordance with State law.

Currently as indicated in CMS' annual financial report, all high schools have 100% of their activity funds invested, junior highs-98%, and elmentaries-96%.

EMPOWER DEPARTMENT HEADS AND PRINCIPALS TO CONTROL COSTS

Mr. L'Orange believes that department heads and principals currently have the ability to control costs. In addition, they are given the flexibility, within State, Federal, and Local Guidelines, to reallocate funds as they see appropriate. As CMS moves toward site-based management, additional allocations will be transferred to the department heads and principals thus giving them more budgetary responsibility.

MODIFY BUDGET PROCESS TO REDUCE INEFFICIENT/CYCLICAL SPENDING

Mr. L'Orange believes that schools are encouraged to plan. Under the interim budget resolution, schools are allowed to start spending their allotments on July 1 of each fiscal year. This enables the principal to provide adequate supplies and materials for the beginning of school. In order to conclude the planning process at the end of March, schools submit plans on how all remaining unencumbered funds will be spent.

A barrier in reducing inefficient/cyclical spending is the fact that the State operates on a cash basis and does not allow the carryover of funds. CMS is offering suggestions to the General Assembly in order that certain laws may be changed which will be beneficial for the school system and would provide efficient spending.

RENEGOTIATE TELEPHONE DIAL TONE SERVICE CONTRACTS

This task was completed while the efficiency review was being prepared.

INSTALL TELEMANAGEMENT SOFTWARE TO OPTIMIZE EQUIPMENT UTILIZATION

CMS is working in conjunction with Southern Bell to determine the appropriate software to use. Once a decision is made, the estimate costs can be determined, and a budget request willb e made.

TRANSFER TELEPROCESSING TO INFORMATION SYSTEMS

This suggestion is currently under review to determine if it would be beneficial to the school system.

Please let me know if you have any questions.

Sincerely,

David E. Parsons
Senior Vice President
Chief Operating Officer

cs

CTG

COMPUTER TASK GROUP, INC

5600 77 Center Drive
Suite 240
Charlotte, North Carolina 28217
(704) 527-6730

March 4, 1993

Mr. Tom Morris
Chief Information Officer
Charlotte Mecklenberg Schools
P O Box 30035
Charlotte, NC 28205

Dear Tom:

Enclosed is the interim assessment of progress made by CMS' Information Technology group against the recommendations contained in the March 1992 study report. Overall, the assessment is positive, reflecting the significant strides made by your staff in improving the responsiveness and efficiency of the Information Systems department.

As with any IS organization in the rapidly changing field, there are additional opportunities that need to be addressed over the next year or so Recommendations made but not implemented yet include the transfer of all communications including telephone to the IS department to allow for more effective planning and management of services and costs. Integration of data and voice networks is mandatory for efficiency and cost management.

A second recommendation that will require initial incremental cost as well as management commitment is that of business process redesign Fancy words, but importantly, IS must take the leadership to initiate a thorough examination of the way information is used in running CMS. First, identify efficiencies or service level improvements that can be gained by doing things differently (better) in other departments and then automate the processes. Outside consulting support will be required.

A third consideration is the use of volunteer resources in helping to achieve your goals. At our last meeting, I identified two potential sources for such support. I would also encourage your use of the Chamber contacts to solicit voluntary support from the business community. Keep up the good work.

Best regards,

Bob

Robert W Hyer
Branch Manager

CMS OPERATIONS REVIEW - INFORMATION TECHNOLOGY

Operations Review - January/February 1993

Background:

From the Operations Review, 21 separate recommendations were presented with associated annual cost savings approximated at $750,000. During January, two individuals from the initial team met with CMS Information Systems to review progress to date and assess potential for further improvement.

Summary:

CMS has made significant strides in organizing and planning information technology efforts. One key factor has been the successful recruiting of Tom Morris as CMS's Chief Information Officer. As a subjective measure of the success of the Information Systems department, satisfaction levels of the user departments within CMS has risen dramatically. Of the initial recommendations, all have been addressed and several are complete. Of the open initiatives, business process analysis and redesign offers the most opportunity for further attention and potential benefit to CMS. This is discussed in more detail relative to recommendation #17.

Efficiencies:

The original recommendations identified $750,000 in annual savings that could accrue from downsizing of the data center staff and conversion of contractor positions to full time employees. Redirecting resources from the data center to other activities has served to bring staffing levels in line with the recommendations while improving support to end users. Several recommendations also added costs that could effect savings for other departments as well as Information Systems.

Specifics:

1. Change the title of the department to Information Systems.
   Status - Complete.

2. Establish the Chief Information Officer position reporting to the Superintendent.
   Status - Complete.

3. Establish Information Systems as a profit center to finance new applications.
   Status - Open; needs further analysis and planning.
   Cost allocation based on usage exists for PC terminals and

data processing services on a small scale. The report is recommending the adoption of a new investment policy which could result in self funding.

As a prerequisite, current funding sources for systems support should be identified and those funds allocated to an on-going Information Technology budget. Currently, funding for projects is provided through reallocation of funded but unstaffed positions in other areas.

As a first step, Information Systems should work with one application area to identify a labor intensive process where an investment in automation will produce significant savings.

4. Move departmental computers from Transportation and Maintenance to Information Systems.
Status - Resolved. After investigation, it has been determined that a physical move of the computers is not warranted. Cooperation among the departments with an understood role of Information Systems in future spending is an appropriate decision. The role of these departmental systems in the overall CMS strategic plan is the responsibility of Information Systems.

5. Develop a comprehensive technology plan for CMS.
Status - An initial draft version of the plan has been produced and reviewed. This is an excellent start! Detailed plans (being developed over the next 6 months) are required to help focus energies and establish priorities.

6, 18. Establish an Information Systems Steering Committee.
Status - Informal liaison with the operating departments has improved significantly with the addition of the CIO. Each functional area of CMS has been reviewed and the need for established and documented processes identified.

The need for formal, scheduled review of plans, progress and priorities for IS by senior management (Director or Assistant Superintendent level) remains an open item.

7, 14, 15, 16. Move teleprocessing to the Information Systems Department.
Status - Deferred.
Based on the number of actions being addressed by the new CIO, it has been agreed to defer the transfer of telecommunications functions to IS. These four recommendations remain valid and should be revisited in mid-1993.

8. Increase the focus on end-user education.
Status - In-progress. Information Systems is working closely with the Staff Development Center to address both the immediate needs for Personal Computer training and the process for continually refining the educational requirements within CMS. Additionally, the submitted budget request includes needed resources for adequate staffing of this function.

9. Organize functionally with Information Systems for accountability.
Status - Completed. The IS department has been divided into four main functions: Application Development, User Support, Technical Services and Operations. For changing job duties, particularly in User Support and Operations, new job descriptions have been presented to Personnel for approval and rating.

10, 13. Outsource the data center or downsize staffing.
Status - Outsourcing was analyzed and rejected.
Most of the savings is lost since CMS owns the computer equipment. Reorganization has appropriately redirected staff to other activities; three to the Information Center for end user support. Projected cost savings identified in the initial report were overstated by double counting of contractor positions and costs. The data center is now operating with a minimal staff and reasonable costs.

11. Revise the salary structure to attract candidates to fill positions.
Status - Very little progress.
Information Systems has specified needed changes in salary ranges and starting salaries but CMS has not yet acted on these recommendations. CMS continues to run a high risk of losing experienced programmers and will definitely lose qualified candidates because of arbitrary and non-competitive salary guidelines.

12. Convert contract programmers to in-house staff.
Status - Little progress.
Contractor funds have been expended over the past three years to meet the staffing needs for Information Systems. Eleven contractors have now been reduced to eight with corresponding savings of approximately $80,000 annually. Recommendation #11 and permanent budget allocation are prerequisites for satisfying this item.

17. Establish a re-engineering methodology for new and existing business processes.
Status - Currently unfunded and unstaffed.
Most of the efficiencies in Information Technology will come not from saving direct expense but in using technology to improve effective management and administration within CMS. Until assistance of qualified consultants can be contracted, top IS managers are investing time in reviewing CMS processes. This critical recommendation requires the commitment of Dr. Murphy and his entire staff.

19. Assign application and data ownership to users of the system.
Status - In progress.
Success has come in bites as the IS staff has addressed interdepartmental data needs. One area being reviewed is the

duplication and fragmentation of data between HR systems and payroll, which could be used as a model for other ownership opportunities. The need for better Executive Information Systems within CMS will raise the urgency of addressing this recommendation.

20. Install a data security system to protect vital data.
Status - Good progress, but budgetary constraints may slow implementation.
A software security package has been installed and system files have been secured. Training of technical staff is moving forward; lack of contractor funds has placed full implementation on hold. Migration to a fully protected environment is projected to take through 1994.

21. Review vital records and back-up procedures.
Status - Complete (qualified).
IS has reviewed current procedures for computer records and has demonstrated that data backup and off-site storage is fully effective. The Chamber task force concerns go beyond computer records to all vital CMS records. IS currently lacks the resources but is the logical choice to define and schedule a CMS-wide review of <u>all</u> records to ensure that record retention is complete and backed-up and to install more modern techniques where appropriate.

CHARLOTTE-MECKLENBURG SCHOOLS

INFORMATION SYSTEMS & TECHNOLOGY

COOPERS & LYBRAND MANAGEMENT LETTER RESPONSE

JANUARY 4, 1993

Improve Back-Up Procedures for Computer Operations

IS&T management agrees with the Coopers & Lybrand recommendation that additional off-site storage is needed, but feels that two generations are sufficient Off-site storage of two generations will begin before the end of February, 1993 This effort will require changes to automated procedures in the tape management system and updates to the written Recovery Plan document

Develop a Micro Computer Policy

IS&T will develop a policy for Micro Computers which will be presented to the Board before the end of 2nd Quarter 1993 The policy will cover backup, virus protection, software piracy, and authorized use of equipment Purchasing policies are covered under the procedures for capital equipment acquisition and controlled by the Finance Department

Strengthen Data File and Program Security

- **Information Security Policy**
  Information security is not just an Information Systems issue and covers a much larger scope than computer generated information IS&T will prepare an Information Security Policy related to computer generated information, which can be incorporated by the appropriate party into an overall CMS Information Security Policy Anticipated completion date is 3rd Quarter 1993

- **Control Security Package**
  IS&T has completed an initial implementation of a host based security package The most critical operationing systems have been secured Full implementation of security for all applications will take considerable applications development staff time and is anticipated to take two years for full implementation

- **System File Security**
  Individual sign on identifications and passwords will be addressed in the long range security implementation

- **System Access**
  Inactivating user IDs after three attempts is part of the long range security system implementation plan, which will be accomplished over the next two years

Develop and Strengthen Disaster Recovery and Business Continuity Plans

Planning a comprehensive disaster recovery or business continuity plan for all departments of CMS is a task beyond the resources available in Information Systems A plan for recovering critical automated records and operating systems is in place now IS&T will work to have a more comprehensive automated systems recovery plan, including contigency plans for loss of the computer room, in place by the end of 4th Quarter 1993

Emphasize Updating the Integrated Student Information System

Maintaining accurate information in the computer systems supporting the school system is a continuing problem, which will not be resolved until the computer systems become a more integral part of how the school system conducts business IS&T will continue to emphasize the importance of maintaining accurate computer files to school personnel and provide validity checks where possible In the long term, IS&T will seek to develop systems which are more integrated into the normal work flow of the enterprise, eliminating duplicate paper work

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DRAFT

EXECUTIVE SUMMARY: LEGISLATIVE BARRIERS

The American education system, all too reminiscent of the now defunct Stalinist bureaucracy of the former Soviet Union, is controlled from the top and the people whose lives are most affected -- students, parents and teachers -- are powerless. It is a world governed by categories and rules, formulas and guidelines.

Like a giant velcro fastening which is tough to disengage, state, local and federal regulators churn out an inexhaustible supply of prose and policy about how to teach They govern testing, time, textbooks, curriculum, compensation, credentialling, competence, staff training, attendance and graduation requirements -- every facet of schooling -- leaving little to the imagination and discretion of those on the front lines.

The fact is rules don't teach If children don't learn, it doesn't much matter that the regulations and guidelines are followed and the public's money is spent according to law. Rules and formulas tend to make staff focus on the wrong things and supply the wrong resources When others dictate every move, teachers and principals aren't responsible for the results When others call all the plays, they have a perfect excuse for poor performance.

Innovation, experimentation and risk-taking are impossible under current restrictions. Reform efforts are dead in the water unless regulators loosen the reins and grant more flexibility to those on the front lines. Deregulation is a must at all levels Local policies and regulations are key targets but for lasting success, state laws must give way to more enlightened thinking. The following represent the key barriers found on the books in North Carolina·

1. TIME RESTRICTIONS

State Barrier: Current laws prescribe the school term, the school day and the time allotted is the same for all children. (115C-1, 115C-84)

For years, we've held time constant and allowed the results to vary. It's time to hold results constant and vary time. Districts need the option to let students proceed at their own pace, giving students as much or as little time as they need to acquire the required skills and knowledge -- understanding that everyone will be held to the same high standard in order to graduate. Given the new demands, that means virtually every student will need to spend substantially more time learning each year The extra time, however, needs to be

viewed as a flexible resource which varies by child in relation to his/her strengths

2. CLASS PERIOD RESTRAINTS

State Barrier: The state prescribes class period lengths. (115C-47(1))

Under the current system, students and teachers just get rolling when the bell rings signaling it's time to quit. It's time to end the 50 minute class periods. Thinking takes time. Districts need to have the option to create a climate for learning that is more natural, where lessons are mutually supportive and there is time for reflection, inquiry and debate.

3. CURRICULUM MANDATES

State Barrier: Current laws prescribe a core curriculum, including sets of competencies that all students must learn by grade level, for each curriculum area. They prescribe, as well, the textbooks to be used and the material and equipment ratios. (115C-47(2), 115C-81)

CMS has just developed a set of high, rigorous standards for academic performance which reflect global demands. Recent national reform efforts and the expectations contained within the International Baccalaureate and Advanced Placement programs serve as the benchmarks. CMS and other districts need flexibility to develop a core curriculum that matches or exceeds current state standards. Local districts also need to have more control over books, materials and equipment.

4. GRADUATION REQUIREMENTS

State Barrier: The state sets the requirements for crediting diplomas. Carnegie units -- which represent little more than hours of course credits on transcripts -- form the basis. (115C-81, 115C-174, 10 et. seq., 16 N.C.A.C.-6D-0103)

It's time to design a new diploma that reflects real mastery. In place of Carnegie units, the CMS plan calls for the development of profiles of competency which describe a student's right to a diploma in units of accomplishment rather than in units of time. CMS also wants to add a senior essay requirement which students will have to present orally and defend under cross-examination. In general, districts need the flexibility to establish alternative crediting.

competency, graduation and diploma requirements that match or exceed current state standards.

5. CLASS SIZE CONSTRAINTS

State Barrier: The state prescribes the maximum class size. (115C-301)

Districts need the flexibility to adjust class size based on program and student needs. Districts should have the option to make some classes as large as fifty to sixty students. This would give teachers time to work with smaller groups of students, to polish lessons and to meet with parents during the off times.

6. SUMMER SCHOOL RESTRICTIONS

State Barrier: The state sets the qualifying criteria for summer school. (115C-233)

Districts need to be able to establish their own criteria for student admission to state-funded summer school Local schools know best which students will benefit most from the experience.

7. STAFFING ALLOTMENTS

State Barrier: The state prescribes certain staffing allotment ratios and places limitations on the use of personnel. (115C-81)

It is time for the state to get out of the business of allotting certain staff ratios. In order to meet the needs of students, schools need the flexibility to make their own decisions about staffing within stated budgetary allotments.

8. TEACHER CERTIFICATION REQUIREMENTS

State Barrier: The state decides who can teach based on paper credentials -- a disturbing state of affairs given the caliber of teaching training programs in the nation. (115C-12 (8) (9) (16), 115C-284 (c) (h), 115C-285 (a) (b), 115C-289 (b), 115C-295, 115C-296 (a) (c), 115C-315 (c) (f), 16 N.C.A.C. 6C.0300)

Teacher licensing, once a safety devise, has become a roadblock, barring as many good as unsuitable candidates Reform requires a fresh

cast of characters -- some new blood in the ranks. Certification should be based on skill. Teaching should be opened up to anyone of sound character who can demonstrate expert command of subject matter and a desire to work with children. This would also help to ease the restrictions on hiring experienced out-of-state personnel, and personnel for special education positions.

9. SALARY LIMITATIONS

> *State Barriers: The state prescribes salary schedules, salary payments, leave, and longevity pay. Differentiated pay must be afforded out of local funds. Overall, the salary schedule is inflexible and non-competitive. (115C-302)*

In order to reflect their priorities and put bite into their outcome-based accountability program, districts need to have control over compensation issues. Salaries need to become performance-based and market-sensitive. That means higher pay for good teachers and those who assume extra duties. It also means paying more to those certified to teach in shortage areas or in difficult circumstances Districts also need greater say-so over where teachers are placed on the salary scale (based on their relevant experience). Leave days must become the province of local districts as well. As things stand, state law encourages teachers to take leave on days when in-service and school planning activities are held

10. EMPLOYMENT TERM REQUIREMENTS

> *State Barrier: State allotted positions limit teachers to 200 workdays a year and 5 days a week. (115C-302)*

In order to do things differently, teachers need time to acquire new skills and knowledge. They need time to confer with colleagues and opportunity to observe skilled practitioners. All of this will take considerably more than the 10 months of work allotted annually.

11. TEACHER EVALUATION MANDATES

> *State Barrier: The state requires that performance be measured by standardized evaluations. (115C-326)*

Hand in hand with differentiated pay, is the need for new outcome-based evaluations that allow for some peer and student evaluation. Local districts need the opportunity to develop their own.

12. REPORTING BURDEN

State Barrier: The state imposes an enormous reporting burden on local districts. They must collect, process and report, in great detail, fiscal, personnel and student data. (115C-12 (18), 115C-45)

Think of all the people needed to check up on whether schools are following these rules. A lot of time is being wasted on compliance. Bottom line: Only outcomes matter. It's time to abandon the focus on rules and reports and become preoccupied with results instead. That means the state needs to do its part by reducing the detailed reporting requirements.

13. STATE ACCOUNTING & DISBURSEMENT RESTRICTIONS

State Barrier: State requirements for accounting of receipts and disbursements have resulted in micro management of local processes, leaving local districts unable to respond to local operational needs. (115C-436 (a) (1), (b); 115C-440 (d))

A reduction in accounting requirements is needed. Financial procedures need to be flexible enough to adapt to changes at the local level while still accommodating the state's need for information.

14. PERFORMANCE-BASED ACCOUNTABILITY PROGRAM REQUIREMENTS

State Barrier: The state guidelines for the state accountability program are detailed and overly restrictive. (115C-238.1 et. seq.)

Educators have always been accountable -- just not for the right things. Schools have long been judged by their efforts, good intentions, compliance with rules, orderly procedures and resource allocations. Shifting the focus to the efficacy of their efforts means judging schools by the quality of their results. Student competency over challenging subject matter, enrollment in demanding classes, low suspension and expulsion rates, high completion and college acceptance rates and strong parent-home connections must become the prime indicators of success A sound accountability program is the cornerstone of any reform plan. School districts need the flexibility to petition the state board with their own performance-based accountability program which meet or exceed state goals

15. CATEGORICAL FUNDING

State Barrier: Local flexibility and ability to meet program needs are severely restricted by categorical state funding. For instance, the state restricts positions for which state funds can be used. (Appropriation Funding Practices)

Block grant funding on per pupil basis is what local districts need today so they can hire the personnel and otherwise spend state funds suited to their demands to better meet state and local goals.

16. TRANSPORTATION MANDATES

State Barrier: The state regulates school transportation programs not only where and how it runs but also who is allowed to ride buses and for what reasons. (115C-12 (17), 115C-240, 115C-242, 115C-246, 16 N.C.A.C. 6 B.0004, 115C-242)

Increased flexibility in funding is necessary in order to accommodate integration plans and other special district circumstances. Moreover, the law needs to be expanded to allow parents, volunteers and non-school-aged children to ride school buses for board-approved programs.

17. PURCHASE REQUIREMENTS

State Barrier: The state mandates that the school system purchase all supplies, equipment and material on state contracts. (115C-522 (a) 143-129)

Why not make this an option instead? Districts need the freedom to purchase items suited to their demands at competitive prices. Currently, there is a local exemption of $30,000 for non-state contract items. Raising the local exemption to say, $100,000, would be a big help.

18. LEASE/PURCHASE RESTRICTIONS

State Barrier: The state limits lease/purchase contracts to automobiles. (115C-47 (28), 115C-426 (f), 115C-522)

This limits the ability of a school system to participate in more cost-effective methods of purchasing items such as computer hardware, energy control system (necessary if schools are to open for the summer), and other key equipment.