



An Organizational Review of the Jefferson County Public Schools

March 2018

At the direction of the Board of Education of the Jefferson County (Kentucky) Public Schools (JCPS), Acting Superintendent of Schools, Dr. Martin Pollio, requested that the Council of the Great City Schools (CGCS) provide a high-level review and evaluation of the school district's organizational structure. Specifically, it asked the Council to review and make recommendations on¹--

- The overall coherence and structure of how the district is organized,
- Spans of control, including staff and departments that report to cabinet members,
- Alignment of functions within major departments,
- Staffing and management levels within departments, and
- Steps that would assist the district in achieving greater operational efficiency, effectiveness, and would enhance its ability to meet its strategic mission.

In response to this request, the Council assembled a Strategic Support Team of senior managers with extensive experience in organizational design and executive management from other major urban school systems across the country. (Attachment A provides brief biographical sketches of team members). Members of the team included--

Willie Burroughs
Chief Operations Officer
San Antonio Independent School District

Jose Dotres
Chief Human Capital Officer
Miami-Dade County Public Schools

Judith Marte
Chief Financial Officer
Broward County Public Schools

¹ The Council has conducted over 300 organizational, instructional, management, and operational reviews in over 50 big city school districts over the last 20 years. The reports generated by these reviews are often critical, but they also have been the foundation for improving the effectiveness of many urban school systems nationally. In other cases, the reports are complimentary and form the basis for identifying "best practices" for other urban school systems to replicate. (Attachment E lists the reviews that the Council has conducted.)

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David Palmer
Deputy Director of Transportation (Retired)
Los Angeles Unified School District

Arnold Viramontes
Chief of Staff (Retired)
Dallas Independent School District

Michael Casserly
Executive Director
Council of the Great City Schools

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

The team reviewed documents provided by the district prior to a four-day site visit to Louisville, Kentucky, on January 30 – February 2, 2018. The general schedule for the site visit is described below, and the complete working agenda for the site visit is presented in Attachment B.

The team met during the evening of the first day of the site visit to make final adjustments to the work schedule. The team then met with Acting Superintendent, Martin Pollio, the next morning to discuss expectations and objectives for the review. The team spent the remainder of the second day and the entire third-day interviewing staff members (a list of interviewees is presented in Attachment C) and reviewing additional documents and data (a complete list of materials reviewed is included in Attachment D).²

The final day of the visit was devoted to synthesizing and refining the team's findings, formulating recommendations, and debriefing the superintendent on the team's preliminary conclusions.

The Council sent the draft of this document to team members for their review to affirm the accuracy of the findings and obtain their concurrence with the final recommendations. This report contains the observations and proposals that were designed by the team to help the district achieve greater effectiveness, efficiency, and educational outcomes.

Jefferson County Public Schools

The current Jefferson County Public School District was chartered in April 1975, when the Louisville Public Schools and the Jefferson County Public Schools merged. Today, JCPS is the largest school district in Kentucky, and, according to JCPS, the 28th largest school district in the United States. JCPS currently serves a diverse enrollment of over 99,250 pre-kindergarten to 12th grade students,³ and employs more than 17,000 individuals. Student enrollment in JCPS recently

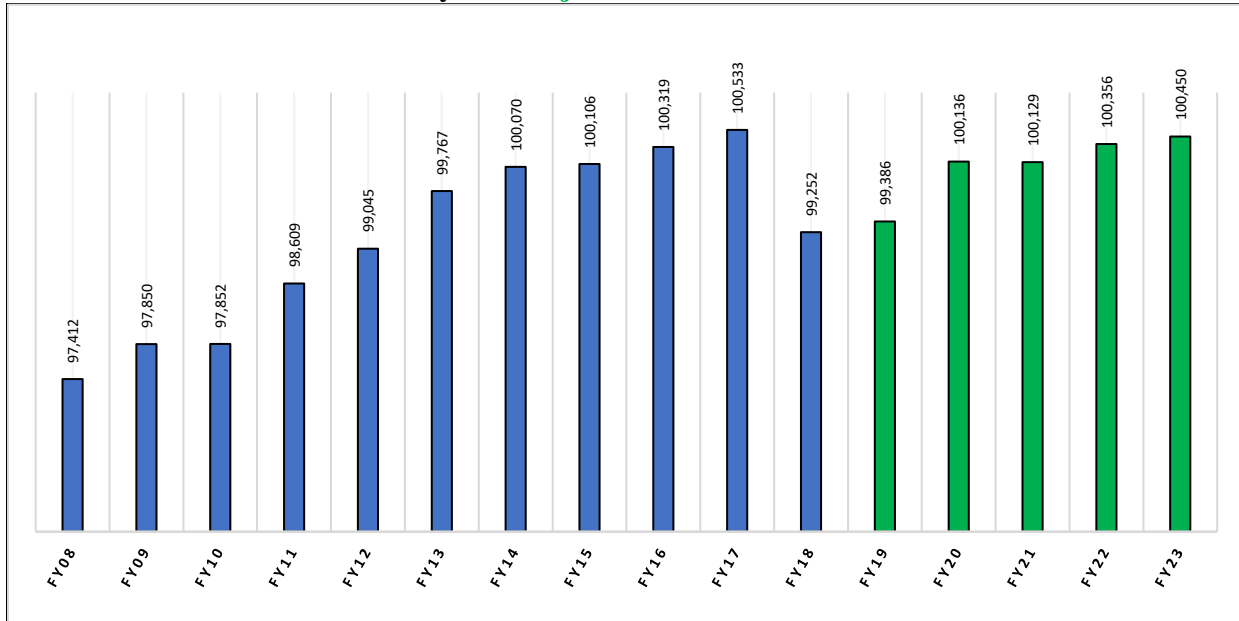
² The Council's reports are based on interviews with district staff and others, a review of documents, observations of operations, and professional judgment. The team conducting the interviews must rely on the willingness of those interviewed to be truthful and forthcoming, but it cannot always judge the accuracy of statements made by interviewees.

³ Source: JCPS.

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declined somewhat due to a change in state law regarding the minimum age a child must attain before enrolling in kindergarten. Exhibit 1 below displays ten years of enrollment history and, projected enrollment through FY23, which anticipates small enrollment increases over the next several years.

Exhibit 1. JCPS Enrollment History and Projections



Source: CGCS with Data Provided by JCPS

JCPS is governed by an elected seven-member board of education that appoints the superintendent of schools and monitors district performance and budgeting. The superintendent is responsible to the board for the efficient operation of the school system and management of the district's current 1.56 billion dollar budget.⁴ The superintendent is also responsible for implementing the JCPS Strategic Plan, *Vision 2020: Excellence With Equity*.

Findings

This management letter articulates strengths that the district can draw on as it moves forward; identifies overarching concerns with the current administrative structure and its spans of control; provides a high-level analysis of the district's staffing levels; identifies related management and operational issues that surfaced during the team's interviews with staff; and offers recommendations to restructure departments and realign functions to support the district in achieving greater operational efficiency, effectiveness, and meet its strategic mission.

A. Commendations

- The board of education recently appointed its interim superintendent to be the full-time permanent leader of the district. He has extensive experience in the district, the confidence of the board, considerable expertise and vision, and the backing of staff.

⁴ Source: <https://www.jefferson.kyschools.us/departments/communications/monday-memo/board-approves-jcps-budget-focused-schools>.

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- The central office has many talented and committed staff members, both at the senior and mid-levels, who the superintendent can strategically deploy to move the school system forward. The team was very impressed by the quality of many senior staff members and their commitment to the district and its success.
- To improve efficiency, the superintendent's cabinet and other direct reports meet biweekly, on alternating weeks.
- The Data Management Unit has excellent expertise and produces high-quality information.
- Information Technology staff saved the district approximately \$700,000 recently by eliminating analog telephones.
- Two Assistant Superintendents for Academic Achievement rotate attendance at cabinet meetings to ensure input from the instructional team.
- Position control safeguards are appropriately implemented and working well.
- The equity office has established an equity scorecard and had taken the lead in setting up a *Males of Color Academy* that is emulated by other major urban school districts across the country.
- The Transportation Services Department has developed an internal Transportation Management Training Program to prepare department candidates for future promotions, a best practice that the Council team does not see in many other urban school systems.
- The district has a relatively extensive early childhood program with a well-defined plan that tracks student performance longitudinally into the early grades.
- District staff has creatively repurposed a surplus school bus into a Mobile Registration Center that travels to communities throughout the county to enroll incoming students, and repurposed two other surplus school buses that have become "Bus Stop Cafes," which serve more than 45,000 free lunch meals to low-income students during the summer.

B. Organizational and Administrative Structures

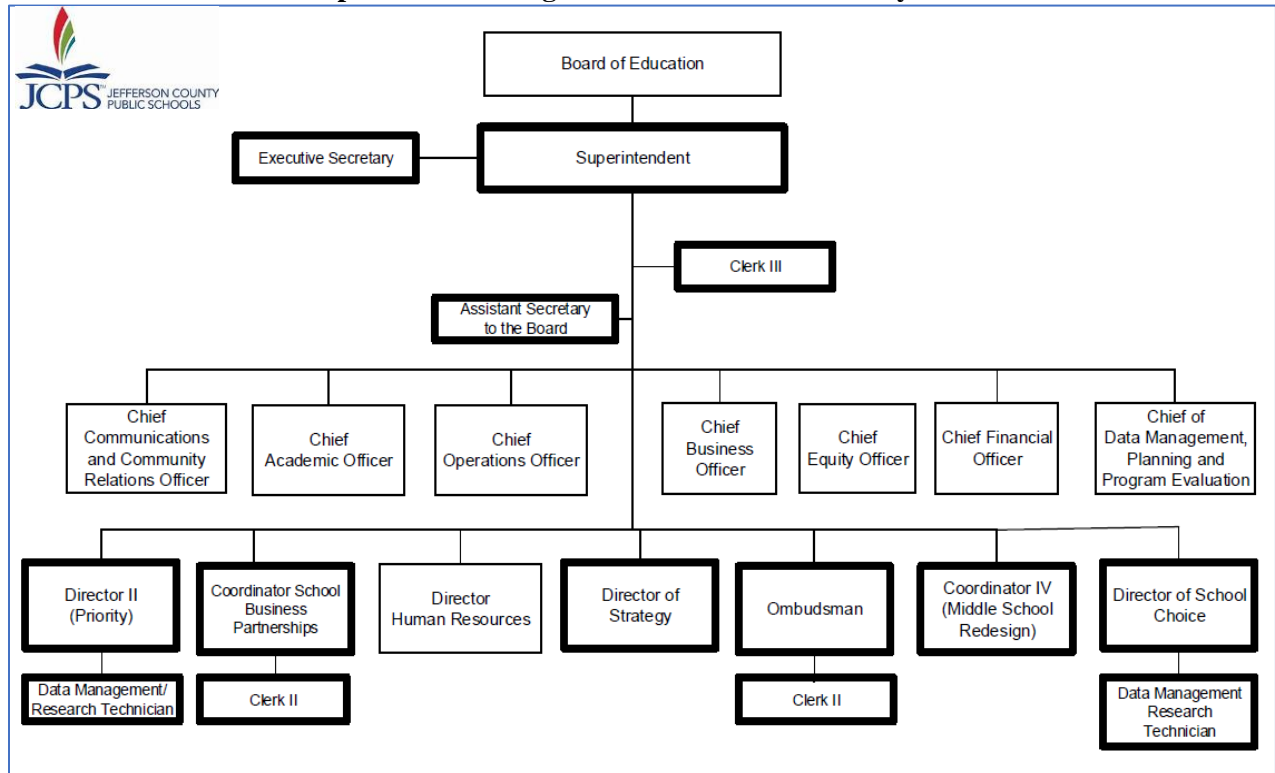
The district appears to be continuously organizing and reorganizing in large and small ways, which made the organizational charts presented to the team fluid at best. Still, overarching issues in the district's organizational and administrative structures that surfaced during the team's interviews with staff members included the following--

- There were functional misalignments in the organizational structure where reporting relationships were not appropriately positioned,
- There were inconsistent or inappropriate spans of control,

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- Complementary functions that were dispersed across multiple locations, which can result in staff working at cross-purposes when they do not have a shared understanding of their functions or they are not coordinating with each other, and
- Other critical functions in the district’s organizational structure were not clearly defined, were undervalued, or did not exist. Exhibit 2 below displays the current organizational structure of the Office of the Superintendent and the fourteen direct report functions.

Exhibit 2. Office of the Superintendent Organizational Chart – January 2018



Source: JCPS

➤ **Functional Misalignments**

- There were functional misalignments identified in the superintendent’s organizational structure that suggested a lack of clarity about where decision making authority resided. For example--
 - Misalignments identified that are likely to affect the Chief Academic Officer’s (CAO) administrative structure and the delivery of instruction systemwide included --
 - Priority schools are not organized under the CAO,
 - School Choice is not under the CAO and does not include magnet schools,
 - The Director of Curriculum Management reports to the Assistant Superintendent for Academic Services rather than to the CAO,

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- Multi-Tiered Systems of Support (MTSS) functions, student relations, and various behavior-oriented staff are under the Area 5 Assistant Superintendent for Academic Achievement, although they are districtwide functions,
 - The Director of Athletics is under the Area 1 Assistant Superintendent for Academic Achievement, although it is a districtwide function,
 - The Louisville Partnership is under the Assistant Superintendent for Academic Support as is the specialist for community support rather than under Communications and Community Relations,
 - Magnet schools are under the Director of College and Career Readiness rather than under the Director of School Choice,
 - English as a Second Language (ESL) services are organized under an Academic Program Consultant III (who is not a consultant) and do not report directly to the CAO,
 - The Director of Early Childhood is under the Assistant Superintendent for Academic Services rather than a direct report to CAO,
 - The Director of Exceptional Child Education reports to the Assistant Superintendent for Academic Support rather than being a direct report to CAO,
 - Adult and Continuing Education is under the Chief Communications and Community Relations Office rather than the CAO,
 - The Office of Communications and Community Relations has a resource teacher assigned to it whose function does not appear to be consistent with the role of that office,
 - The district Health Coordinator reports to the Assistant Superintendent for Academic Support while behavior functions report to Area 5,
 - Pupil personnel (including social workers) is under the Chief of Data Management, Planning and Program Evaluation rather than under the CAO, and
 - Speech/language pathologists are not included under the ECE organization chart; instead, they are under school principals.
- Misalignments identified that impact the Chief Equity Officer's administrative structure included --
 - The Equity Office is presented on the organizational chart as a line⁵ function even though it mostly operates homeless support functions and provides staff functions,

⁵ A line function or position has authority and responsibility for achieving the major goals of the organization. A staff function or position is a position whose primary purpose is providing specialized expertise and assistance to line positions.

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- The director of compliance and investigations is under the Chief Equity Officer rather than under an in-house general counsel, which is an office the district does not currently have,
- Parent relations, community liaisons, and the volunteer center are under the Equity Office rather than under Community Relations,
- Section 504 programs are under the equity office rather than under Exceptional Child Education (ECE), and
- Heightened concern was expressed about the qualifications and training of the compliance and investigation unit assigned to the office of the Chief Equity Officer.
- Misalignments identified that affect the district's Information Technology (IT) function included--
 - The current IT function reports to the Chief Operations Officer, not to the superintendent, which is a best practice,
 - The district's IT and Performance and Technology functions are bifurcated into separate units, and
 - The student assignment office is under the Chief of Data Management rather than under a student services office.
- Misalignments identified that affect the Chief Financial Officer's administrative structure included --
 - Real Estate Acquisition and Sales report to the Grants Accounting Manager, a function that is generally under Facilities, and
 - A fiscal manager is housed in the Office of the Chief Operations Officer but reports to the Director of Accounting (Office of the Chief Financial Officer).
- Misalignments identified that affect the Chief Operations Officer administrative structure included --
 - School site administrative staff lacks the technical expertise to effectively manage the day-to-day intricacies of school nutrition service delivery. School and Community Nutrition Services is a highly regulated, compliance-based operation. The team was told that --
 - ✚ There was inconsistent enforcement of United States Department of Agriculture regulations that pertain to meal programs at schools,
 - ✚ There was inconsistent delivery of nutrition services to students,
 - ✚ There were inconsistent evaluation of and progressive discipline of school site nutrition service employees, and

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- ✚ School site administrative staff overseeing the food service function was not a best practice.⁶
- Some maintenance personnel, with no accountability to the maintenance department, report directly to and are evaluated by high school principals. The team was told --
 - ✚ This practice has negatively affected timely maintenance services to all district schools and buildings, and
 - ✚ That one campus principal “sold” the position to satisfy another requirement on that campus.
- Property Auditors, who currently report to Supply Services, are misaligned in that this audit function should be part of the district’s internal audit office.
- Misalignments identified that affect the Human Resources administrative structure included--
 - Risk Management, which is an enterprise-wide function, incorrectly resides in Human Resources,⁷ and
 - The team identified a misaligned insurance technician position assigned to the Coordinator of Grants Accounting.
- The Director of Strategy (which is a one-person office shown as a line position on the organizational chart) reports to the superintendent, but the Director of Resource Development reports to the Chief of Data Management, Planning, and Program Evaluation.
- **Inappropriate or Inconsistent Spans of Control in Critical Positions**
 - The team found large spans of control in key departments, which tend to foster operational silos where processes, systems, business units, management styles are not collaborative, or where employees cannot or do not interact with each other. For example --
 - Fourteen senior staff members are direct line reports to the superintendent,⁸ making the superintendent’s span of control unusually large to be effective. Line reports to the superintendent include seven Chief Officers, four Directors, two Coordinators, and one Ombudsman,
 - Eight Assistant Superintendents, four Directors, one Coordinator, and one Resource

⁶ A recent CGCS survey conducted for this review found only one district (JCPS) of the 28-member districts that responded, which school site food service staff were directly supervised a site administrator.

⁷ The team was told that Risk Management is part of HR and is listed on the Organizational Charts - Table of Contents. However, the team could not find Risk Management on the HR organizational chart, or on any other organizational chart.

⁸ Source: JCPS Organizational Charts, dated January 23, 2018.

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Teacher (total 14) are direct line reports to the Chief Academic Officer,

- The Director of Curriculum Management (who reports to the Chief Academic Officer) has 13 direct reports,
- The Senior Manager - Infrastructure Services has 11 direct reports, and
- The Chief Equity Office has 10 direct line reports.
- Because of these large spans of control --
 - Organizational priorities risk being redefined across departments,
 - Insulated decision making is likely to occur, and
 - Teamwork, communications, and collaboration become inhibited. Exhibit 3 below displays the number of direct reports to the superintendent and to those he directly supervises.

Exhibit 3. Organizational Spans of Control

Spans of Control - Superintendent's Organization	Direct Reports
Superintendent	14
Chief Academic Officer	14
Chief Equity Officer	10
Chief Operations Officer	8
Chief of Data Management, Planning and Program Evaluation	7
Chief Communications and Community Relations Officer	5
Director Human Resources	5
Chief Financial Officer	4
Director II (Priority)	1
Coordinator School Business Partnerships	1
Director of Strategy	1
Ombudsman (Vacant)	1
Coordinator IV (Middle Schools Redesign)	1
Director of School Choice	1
Chief Business Officer (Vacant)	

Source: JCPS Organizational Charts, Dated January 23, 2018

➤ **Functions Dispersed across Multiple Departments**

- IT functions in the district were disparate and not centrally managed. For example--
 - Accounting and payroll departments administered their own departmental security and access, and
 - Transportation Services staff administered school site access to transportation information security, rather than IT being the manager of security for all district systems.

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- Computer education functions were divided between the instructional unit and information technology.
- Local assessments are handled by curriculum, but state assessments were processed by data management.
- WEB Master and school WEB support reported to different areas.
- Data management and research personnel were dispersed across the organization.
- **Functions Not Clearly Defined, Undervalued, Vacant, or Non-Existent**
- Critical positions were left unfilled or were filled on a temporary basis for considerable periods. Examples included --
 - Chief Academic Officer,
 - Assistant Superintendent for Academic Services,
 - Director of Human Resources (lack of consistent leadership for multiple years), and
 - Director of Internal Audit (this function is currently outsourced). The district's three internal auditors report to and are supervised by the outsourced CPA staff. This arrangement creates internal control and accountability issues. As a result of these vacancies --
 - There was a lack of coherence in managing tasks,
 - There was a lack of focus on goals and responsibilities,
 - Teamwork, communications, and collaboration, which are essential to breaking down departmental silos, was inhibited, and
 - There was a lack of presence or representation at superintendent-level cabinet meetings.
- The Director of Human Resources, a direct report to the superintendent, is incorrectly positioned at the director level. The scope and mission-critical function of the department necessitates this position being moved to the Chief level.
- The district lacks a Chief of Schools position to provide focused operational oversight and guidance to and consistent evaluation of school principals.
- The superintendent's office has no permanent Chief of Staff position, which is essential to oversee and coordinate the critical day-to-day functions of the office and serve as a buffer for the superintendent.

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- The district has no in-house general counsel, which is considered a critical best practice for large urban school districts. Although the district has outsourced some functions typically assumed by an in-house counsel, the team was told that --
 - Out-sourcing was very costly,
 - District business disruptions have occurred, as evidenced by the e-rate application process,
 - Performance and Technology was reviewing contracts and bids without assurance of compliance, and
 - Open records requests were currently filled by the communications office, which does not have the legal expertise to determine the appropriateness of when to approve or deny requests.
- The Office of the Assistant Superintendent for Academic Support Programs (health, special education, counseling, partnerships, family and youth resources) was not adequately differentiated from the Office of the Assistant Superintendent for Academic Services (curriculum, Title I/II, library media, early childhood, ESL, gifted/talented, and computer education). It was not clear why some functions were under one office but not the other.
- Several units in the central office have large numbers of resource teachers whose specific duties and responsibilities were not always clear to the team, and
- The superintendent's organizational chart reflected a secretary position who reports to the Board of Education and the superintendent, but the team was uncertain that this function was represented as a board liaison as such.

C. Organizational Impact

- Deeper Learning is an instructional philosophy or approach, but it is configured as an organizational function on the organizational chart.
- The team was repeatedly told that there was a lack of cross-functional teaming across multiple areas of responsibility.
- The team was told in a meeting with all district chiefs that the January 23, 2018, organizational charts reflected actual reporting lines. However, Deeper Learning, Title I, and Curriculum Management were shown on the organizational chart as reporting to the CAO, when in fact they reported to the Assistant Superintendent for Academic Services— at the time of the interviews. Other examples included --
 - Risk Management could not be found on the organizational chart, and
 - A Support Service Aide position shown as reporting to the Chief Operations Officer does not exist.

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- The roles and responsibilities for professional development were dispersed across three areas, i.e., Curriculum Management, Coordinator of Professional and Deeper Learning, and Human Resources/Professional Development.
- Job titles and salary levels were uneven at the C-level of the organization, which has negatively impacted morale.
- On the surface, job titles do not always clearly define roles. For example --
 - The organizational chart displays an Assistant Secretary to the Board, who reports to the superintendent, but the position does not function as a board liaison *per se*,
 - Property Auditors, who apparently have no audit function,
 - The position title, “Academic Consultant,” is not a consultant but a district employee, and
 - The function and scope of responsibility of the Strategy Officer, who was originally charged with the development of the district’s strategic plan, now has roles that are not aligned with the title and job description. For example --
 - The current staff person in the position engages in the development of Board Agendas, Community and Governmental Relations, Policy Management, and filling “gaps” where needed.
- There appear to be excessive staff layers in the academic office (at least 11 layers depending how one counts).
- There was considerable variation in job titles among staff who reported to the superintendent and that are shown on the organizational chart at the same level. To illustrate--
 - Priority Schools, Human Resources, Strategy, and School Choice, are led by Directors,
 - School Business Partnerships and Middle School Redesign are led by Coordinators, and
 - Ombudsman are at the same level on the organizational chart.
- The team found no evidence of a formal government relations function, which is typically found in large city school districts.
- Assistant Superintendents for Academic Achievement --
 - Were organized around geographic regions rather than grade spans,
 - Were responsible for too many schools to be effective, and

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- Sometimes bring to their positions uneven instructional expertise or a lack of administrative experience for the grade level of schools they oversee.
- It was not clear to the team what functions and duties were performed by the Evaluation and Transition Coordinators who report to the Area Superintendents for Academic Achievement. The team was told that they were essentially deputy area superintendents, but they did not appear to have the authorities of a deputy. The title of the position did not reflect what the position entailed.
- Medicaid third-party billing did not appear to be a joint function between ECE and finance. The organizational chart reflects the function is being solely under the ECE office.

D. General Staffing Levels

- Little change in staffing ratios had occurred since 2009 when the CGCS was asked by the Board of Education and the Superintendent of Schools at the time to determine if the district was overstaffed. The review, using 2007-2008 data, indicated, in part, that --
 - In 2008, the district was somewhat overstaffed (total staffing) when compared to other major school districts across the country, but the degree of overstaffing was less than one student per staff member. Today, the district continues to be somewhat overstaffed, when compared to similarly sized districts, by slightly more than one student per staff member,
 - In 2008, the district had about the same number of teachers as one would expect of a school system its size. Today, however, JCPS has substantially fewer teachers as compared to similar sized urban districts, and
 - In 2008, the district had substantially more school site administrators and support staff when compared to similar urban districts. Today, JCPS continues to have considerably more school site staff than the median Great City School (GCS) district. Exhibit 4 below compares various JCPS staffing ratios for the 2007-2008 school year, and more current 2014-2015 and 2015-2016 school years. The source for the data is the National Center for Education Statistics (NCES) in the U.S. Department of Education.^{9,10}

⁹ Source: <https://nces.ed.gov/>. The NCES has an extensive array of data on every school district in the nation, including data on staffing levels by category and personnel expenditures.

¹⁰ The team must rely on the accuracy of the data reported by school districts and states to NCES when making comparisons.

Exhibit 4. Staffing Ratio Comparisons

FACTOR	2007-2008		2014-2015		2015-2016	
	JCPS	GCS Median	JCPS	GCS Median	JCPS	GCS Median
Student to Total District Staff Ratio	6.90	7.60	6.78	7.94	6.85	n/a
Teachers as a Percentage of Total Staff	43.30	50.60	40.96	50.00	41.07	n/a
Students per Teacher	15.80	15.80	16.57	15.93	16.68	n/a
Students per Total Central Office Administrative and Support Staff	200.20	215.40	241.25	216.71	241.09	n/a
Students per School Site Administrative and Support Staff	68.00	113.30	64.61	116.35	66.04	n/a
Students per School and Central Office Administrative and Support Staff	n/a	n/a	50.96	71.77	51.84	n/a

Source: NCES

- The team also reviewed current staffing levels (FTEs) and ratios using NCES 2014-15 data (the most recent full national data sets available--blue column above) to analyze JCPS student to staff ratios. The team found that --
 - JCPS had approximately 6.78 students per total staff member compared to the Great City School median of 7.94 students per total staff member.¹¹ In other words, JCPS had somewhat more total staff for its size than the median Great City School district. Exhibit 5 below compares JCPS and other Great City School districts with data provided by the National Center for Education Statistics,
 - JCPS had a significantly smaller proportion of total staff members who were teachers than the median Great City School district, 40.96 percent vs. 50.0 percent, respectively.¹² Exhibit 6 below compares JCPS and other Great City School districts with data provided by the National Center for Education Statistics,
 - JCPS had slightly more students per teacher than the median Great City School district, 16.57 vs. 15.93, respectively.¹³ In other words, JCPS had somewhat fewer teachers for its enrollment than did the median Great City School district. Exhibit 7 below compares JCPS and other Great City School districts with data provided by the National Center for Education Statistics,
 - JCPS had more students per total central office administrative staff than the median Great City School district, 241.25 vs. 216.71, respectively.¹⁴ In other words, JSPS had

¹¹ This ratio is calculated by dividing the number of JCPS students by total district staff.

¹² This percentage is calculated by dividing the total number of teachers by total district staff.

¹³ This ratio is calculated by dividing the number of JCPS students by total teachers.

¹⁴ This ratio is calculated by dividing the number of JCPS students by the combined total of the central office administrative and support staff. Central office staff for this measure include superintendents, deputies, and assistant superintendents; other persons with districtwide responsibilities; e.g., accountants, auditors, business managers,

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fewer district-level administrators for a district its size than the median Great City School district. Exhibit 8 below compares JCPS with other Great City School districts from data provided by the National Center for Education Statistics,

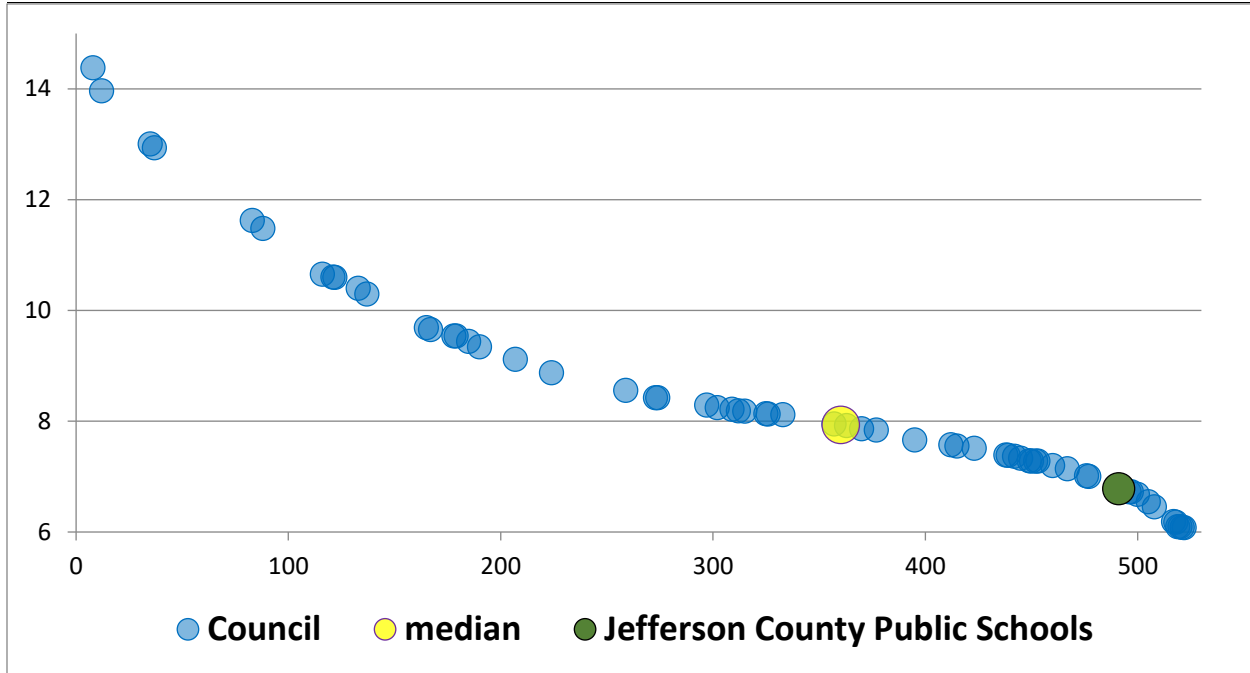
- JCPS had significantly fewer students per school site administrative and support staff compared to the median Great City School district, 64.61 vs. 116.35, respectively.¹⁵ In other words, JCPS had more total school site administrators and support staff for a district its size than the median Great City School district. Exhibit 9 below compares JCPS and other Great City School districts with data provided by the National Center for Education Statistics, and
- JCPS had fewer students per combined school and central office staff than the median Great City School, 50.96 vs. 71.77, respectively.¹⁶ In other words, JCPS had significantly more school site and central office administrators and support staff for a district its size than the median Great City School district. Exhibit 10 below compares JCPS with other Great City School districts with data provided by the National Center for Education Statistics.

facilities managers, technology or information system administrators, or supervisors of transportation, food services, or security. Support staff members providing direct support to LEA administrators, business office support, data processing, secretarial and other clerical staff; staff implementing software solutions and staff providing hardware and software maintenance and data user support.

¹⁵ This ratio is calculated by dividing the number of JCPS students by total school site administrative and support staff. School site staff in this measure include principals, assistant principals, and persons who supervise school operations, assign duties to staff members, supervise and maintain the records of the school, and coordinate school instructional activities with those of the education agency, including department chairpersons, clerical staff and secretaries.

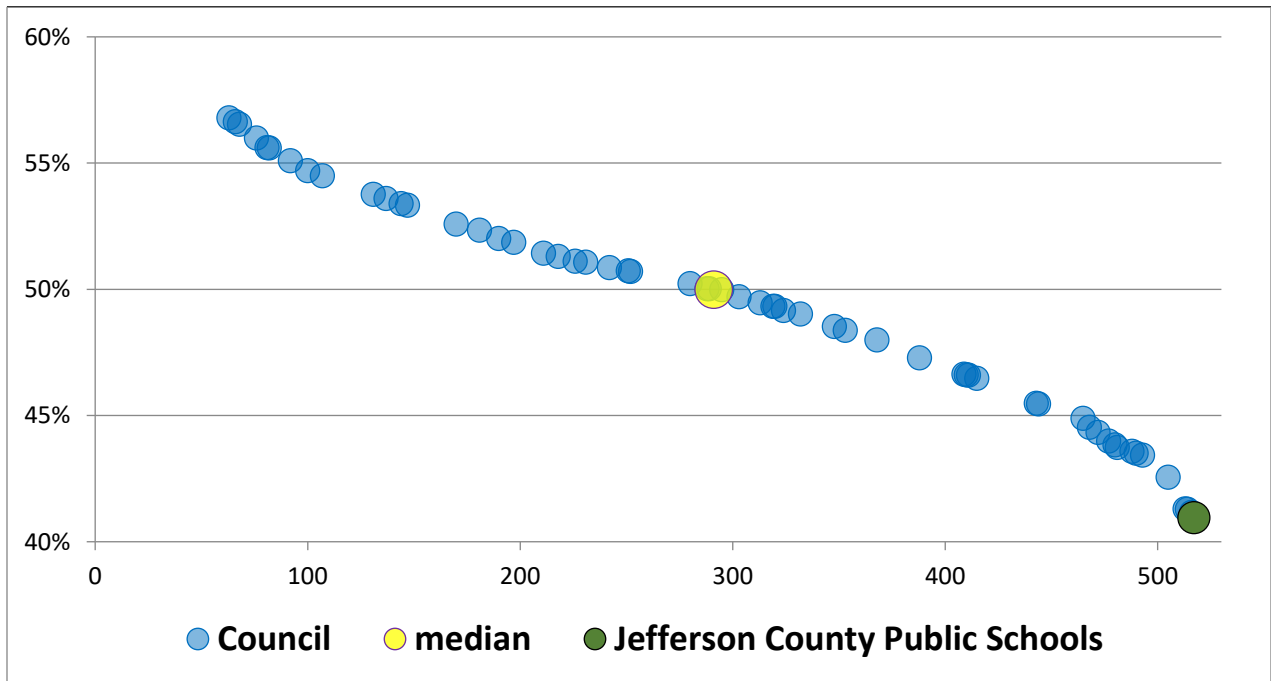
¹⁶ This ratio is calculated by dividing the number of JCPS students by total school and central office administrative and support staff. School site staff in this measure include principals, assistant principals, and persons who supervise school operations, assign duties to staff members, supervise and maintain the records of the school, and coordinate school instructional activities with those of the education agency, including department chairpersons, clerical staff and secretaries. Central office staff for this measure include superintendents, deputies, and assistant superintendents; other persons with districtwide responsibilities; e.g., accountants, auditors, business managers, facilities managers, technology or information system administrators, or supervisors of transportation, food services, or security. Central office support staff includes staff members providing direct support to LEA administrators, business office support, data processing, secretarial and other clerical staff; staff implementing software solutions and staff providing hardware and software maintenance and data user support.

Exhibit 5. Student to *Total District Staff* Ratio in Jefferson County and Great City School Districts



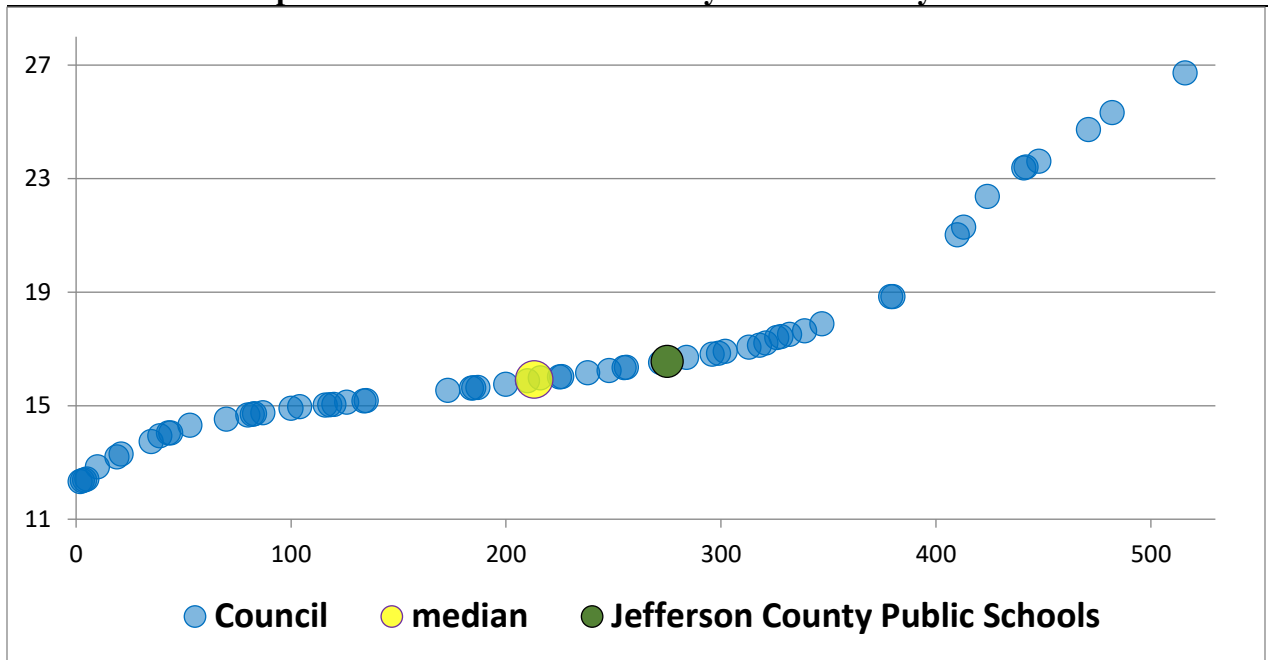
Y-axis=number of students-to-total staff; X-axis=ranking in relation to all school districts in the nation with enrollments of over 15,000. Note that each blue dot represents a Great City School district. JCPS had 6.78 students per staff member; the median for the Great City Schools was 7.94 students per total staff member.

Exhibit 6. Teachers as a Percentage of *Total Staff* in Jefferson County and Great City School Districts



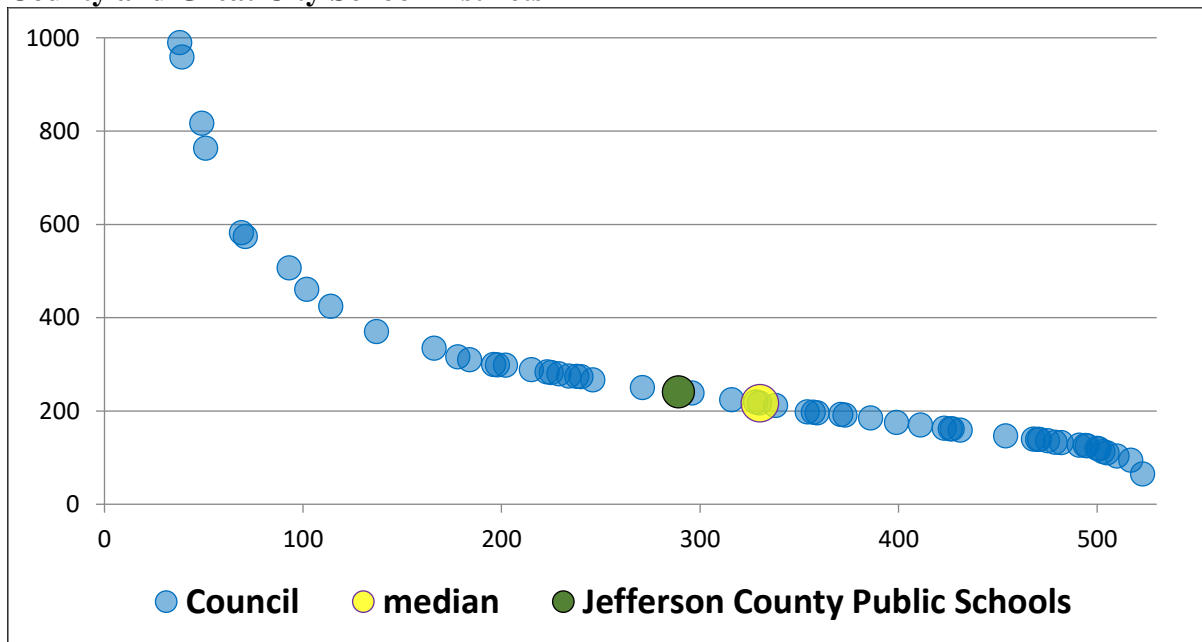
Y-axis=percent of total staff who were teachers; X-axis=ranking in relation to all school districts in the nation with enrollments of over 15,000. Note that each blue dot represents a Great City School district. JCPS's percentage of all staff who were teachers was 40.96 percent; the median for the Great City School districts was 50.0 percent.

Exhibit 7. Students per Teacher in Jefferson County and Great City School Districts



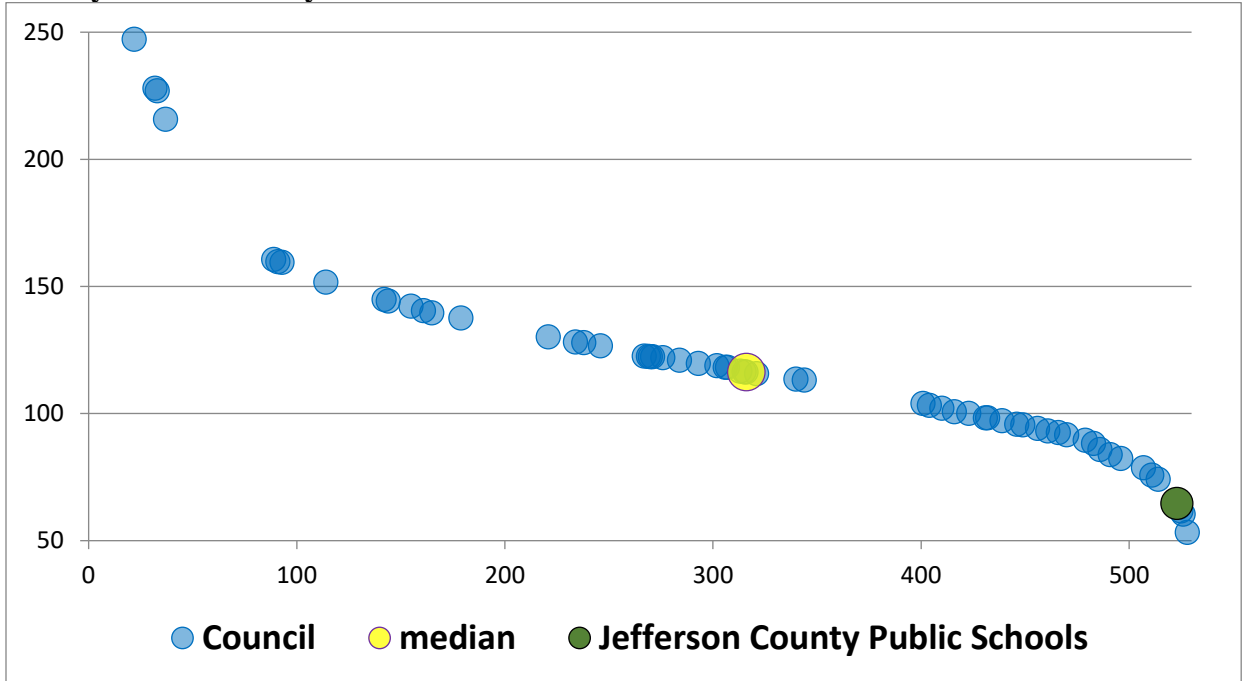
Y-axis=number of students-to-teachers; X-axis=ranking in relation to all school districts in the nation with enrollments of over 15,000. Note that each blue dot represents a Great City School district. JCPS had 16.57 students per teacher; the median for the Great City Schools was 15.93 students per teacher.

Exhibit 8. Students per Total *Central Office* Administrative and Support Staff in Jefferson County and Great City School Districts



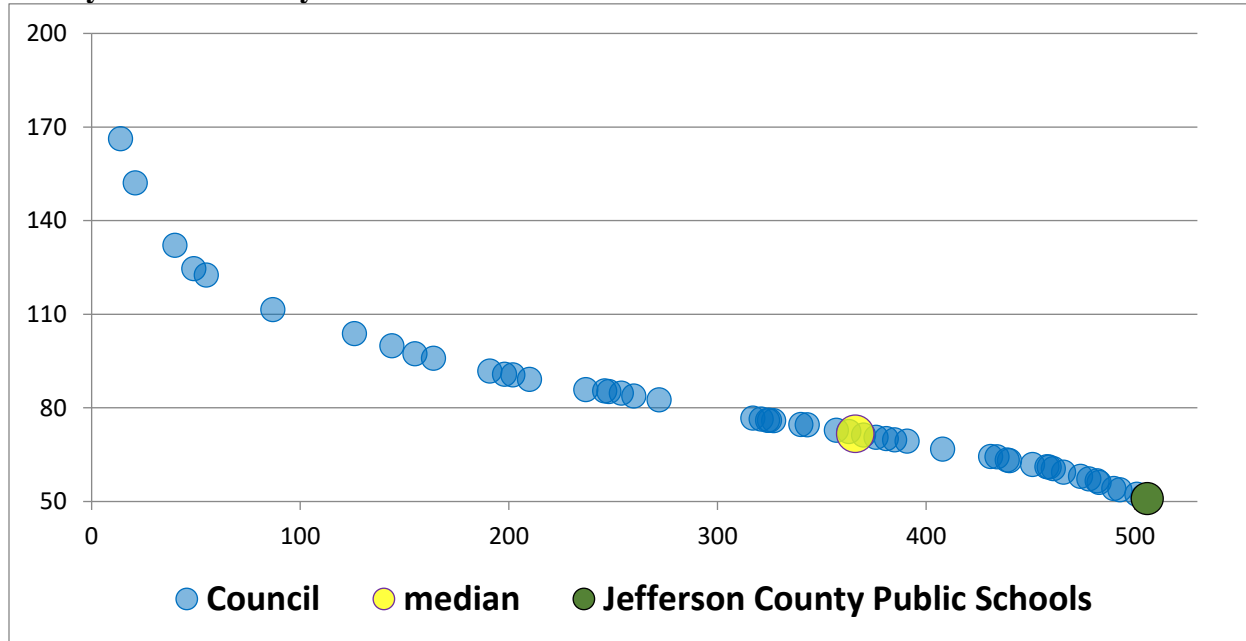
Y axis=number of students per district-level administrator; X-axis=ranking in relation to all school districts in the nation with enrollments of over 15,000. Note that each blue dot represents a Great City School district. JCPC had 241.25 students per district-level administrator; the median for the Great City Schools was 216.71 students per district-level administrator.

Exhibit 9. Students per Total School Site Administrative and Support Staff in Jefferson County and Great City School Districts



Y-axis=number of students per administrator; X-axis=ranking in relation to all school districts in the nation with enrollments of over 15,000. Note that each blue dot represents a Great City School district. JCPS had 64.61 students per administrator; the median for the Great City Schools was 116.35 students per administrator.

Exhibit 10. Students per Combined School and Central Office Total Staff in Jefferson County and Great City School Districts



Y-axis=number of students per school-based administrator; X-axis=ranking in relation to all school districts in the nation with enrollments of over 15,000. Note that each blue dot represents a Great City School district. JCPS had 50.96 students per school-based administrator; the median for the Great City Schools was 71.77 students per school-based administrator.

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- The team also compared 2015-2016 (latest audited data available) cost per student, by function, of the ten largest school districts in Kentucky.¹⁷ Exhibit 11 below compares JCPS costs per student against these districts. While focusing on staffing, (Functions displayed on Exhibit 11: Instruction 1000 are classroom teachers, Student Support 2100 are school site certified non-classroom staff,¹⁸ Instruction Staff 2200 are central office certified staff,¹⁹ District Admin 2300 are central office administrators, and School Admin 2400 are school site administrators)²⁰ the team found that JCPS --
 - Instruction staff (2200) cost per student was higher than the other nine districts,
 - District administrative staff (2300) cost per student was the lowest of the ten districts, and
 - School administrative staff (2400) cost per student was higher than the other nine districts.²¹

Exhibit 11. Cost Per Student by Function

District	Unadjusted ADA	Instruction 1000	Student Support 2100	Instruction Staff 2200	District Admin 2300	School Admin 2400	Business 2500	Plant Operations 2600	Pupil Transportation 2700
Jefferson County	90,054	\$7,237	\$627	\$1,486	\$51	\$956	\$465	\$1,220	\$853
Fayette County	37,575	\$7,357	\$650	\$487	\$191	\$698	\$640	\$1,000	\$554
Boone County	19,125	\$5,802	\$569	\$399	\$320	\$602	\$289	\$798	\$750
Warren County	13,669	\$5,596	\$565	\$230	\$121	\$541	\$220	\$855	\$496
Kenton County	13,417	\$5,590	\$582	\$309	\$173	\$622	\$123	\$783	\$811
Hardin County	13,335	\$5,721	\$663	\$584	\$99	\$556	\$155	\$807	\$747
Bullitt County	12,208	\$6,031	\$306	\$587	\$157	\$640	\$170	\$618	\$599
Oldham County	11,486	\$5,987	\$549	\$478	\$169	\$605	\$200	\$739	\$612
Madison County	10,816	\$5,767	\$538	\$487	\$128	\$411	\$154	\$734	\$747
Daviess County	10,531	\$6,691	\$391	\$363	\$84	\$698	\$187	\$631	\$699
Average		\$6,178	\$544	\$541	\$149	\$633	\$260	\$819	\$687

Source: Kentucky Department of Education

¹⁷ Source: <https://education.ky.gov/districts/FinRept/Documents/Revenues%20and%20Expenditures%202015-2016%204%207%2017.xlsx>

¹⁸ Includes, for example, school site pupil attendance, social workers, health, psychological, and speech pathology and audiology services.

¹⁹ Includes, for example, improvement of instruction, instruction related technology, instructional staff development, and library/educational media services.

²⁰ Chart of Accounts can be obtained here:

<https://education.ky.gov/districts/FinRept/Documents/KDE%20Chart%20of%20Accounts%20Quick%20Reference%20Guide%202017.xls>

²¹ The team was told that JCPS assigns assistant principals to every school, including elementary schools (not commonplace in Kentucky), which may account for the increased cost per student.

E. Management and Operational Issues

- The academic functions of the district were poorly organized and disjointed, with uneven collaboration, and they are not aligned to any coherent set of instructional priorities. As a result--
 - The organization lacks clearly stated academic goals and measurable outcomes that are aligned with the district's strategic plan,
 - The district lacks a coherent and effective strategy to raise academic achievement and does not have a clear plan for improving its lowest-performing schools, and
 - There was weak accountability systemwide for the improvement of academic performance for students.
- Business cases with financial analysis have not been developed to move the district forward to address critical operational challenges and opportunities. For example --
 - The team was told that the average age of JCPS facilities is approximately 55 years; however, there was no evidence of a long-range capital plan, and
 - The team was told that there were 1,100 buses and approximately 500 white fleet vehicles that are aging, but there was no evidence of a vehicle replacement schedule or plan for both.
- The team identified operational weaknesses that could place the district at risk. Specifically –
 - The team found no evidence of the existence or definition of a cybersecurity function to help prevent information breaches, equipment damage, overall network failures, and the potential for “hacking,”
 - The district has not performed a districtwide IT risk assessment, and there is an apparent lack of security, systems controls, and training in place to ensure employee access to critical systems, such as student information and payroll is appropriately approved and fulfilled. To illustrate --
 - The team found no evidence that security tiering, defined by roles and responsibilities, was in place and that the employees empowered to facilitate access have received appropriate training, and
 - The team found no evidence of a business continuity/disaster recovery plan in place.
- The team found no evidence of an enterprise-wide program management strategy or governance structure to coordinate strategic priorities or resolve conflicts. As a result --

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- There were no controls in place to ensure the district’s leadership team has complete, accurate, and timely information to make appropriate management decisions or conduct strategic planning, and
- There was no Project Management Office with the methodologies and controls in place to ensure that strategies, directions, and instructions from management are coherent and carried out systematically or piloted expertly.
- The team found no deliberative or proactive succession planning to ensure continuity in the event of retirement, promotion, or resignation of critical staff in crucial leadership functions.
- Professional development is not evaluated for its fidelity of implementation or its impact on student achievement.
- Legacy systems and practices tend to be pervasive in many departments. The team was often told, “we have always done it this way.” To illustrate --
 - District payroll reporting is not entirely electronic as payroll certifications are made on “hard copies” that are manually delivered by the district’s internal mail system from 175 school and office locations,
 - Personnel hiring functions, transactions, and record keeping are heavily dependent on manual transactions and an efficient and more automated HR platform was not in place, and
 - The Transportation Services Department spends considerable time manually entering and/or correcting bus driver time.
- The team was told that the current organizational structure evolved to appease disgruntled staff or select “favorites,” without consideration to improving efficiencies or educational outcomes. For example --
 - Several retirements in a critical department resulted in changes in job descriptions to accommodate the skill sets of a specific candidate the appointing authority wanted to assign, and
 - Having the right people, in the right position, with the right skill sets, is not always the priority.
- There was a lack of districtwide comprehensive technical specifications and migration strategy for technology equipment. To illustrate --
 - There were minimal equipment specifications in place for purchasing computers,
 - Computers issued to administrators did not have refresh cycles or funding set aside for that purpose, and

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- Site-based decision making allows for the procurement of hardware that may be inconsistent with written standards.
- Academic initiatives occur without long-range consideration for facilities. For example, Career and Technology Education at one point became a district priority triggering the repurposing of classrooms (adding additional infrastructure and connectivity). The team was told that within a year or two, the same classrooms were repurposed again for a different initiative.
- Resource Teachers and Goal Clarity Coaches were inconsistently used school-to-school and across departments. The result was unevenness in instructional service delivery.
- The effectiveness and responsiveness of the Human Resources Department were viewed negatively by multiple stakeholders. The team was also told that --
 - There were inconsistencies in the amount of time needed to onboard new employees. The team heard this process takes from ten days to six weeks, with the state background check alone taking four weeks,
 - Employee performance and evaluation cycles are inconsistent between departments. Some departments stated they were required to issue performance evaluations annually, other departments said evaluations were needed every other year, and another department noted that depending upon classification, every four years was required. Annual performance assessment, tied to measurable outcomes and goals, is a best practice. The team noted that--
 - A formal process, protocol, or structure to initiate or revise job descriptions could not be delineated,
 - The online employment application procedure lacks simplicity, is difficult to understand, and some screens were challenging to complete, especially for entry-level positions.²² The online process was not available in multiple languages, requires five references, all needing an email address. These may be contributing factors to the district's inability to fill entry-level positions, such as bus driver, housekeeper, and nutrition services,
 - There was no specific focus in HR on recruiting and hiring personnel in the 18 priority schools,
 - The unit charged with recruiting and hiring certified staff appears to be understaffed and is populated with principals who were not formerly vetted or did not competitively apply for these positions, and
 - The expertise and background needed in labor relations and negotiations appeared to be lacking.

²² A review team member attempted to “apply” online for an entry-level position and found the process to be cumbersome.

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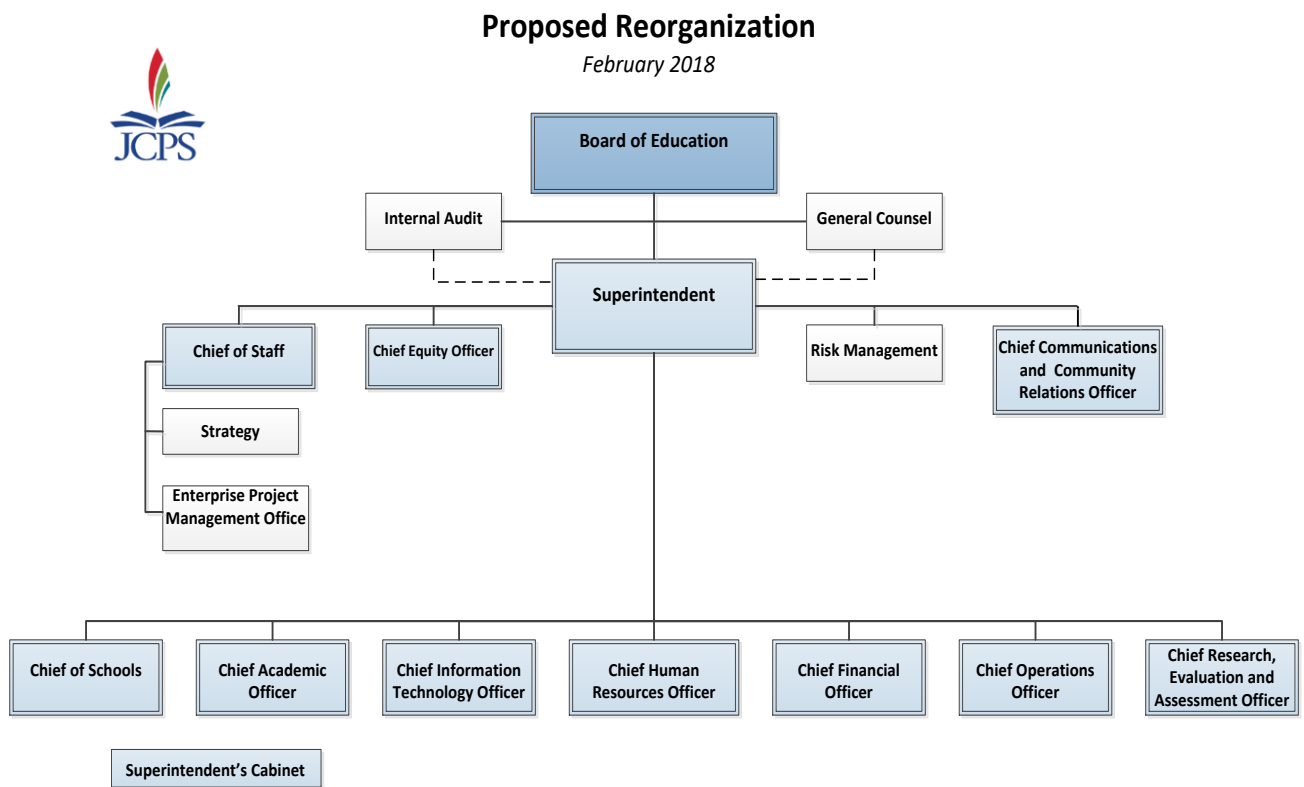
- The newly adopted Measures Academic Progress (MAP) test will provide the district with growth data over the course of the year, but it does not appear to be aligned with the district's pacing guide or state standards. The growth metrics were not calibrated in a way that would result in district students closing the gap on state expectations, and the result may eventually skew instructional practice at the classroom level as teachers begin to align their practice with the growth metrics than with state standards.
- The district's instructional curriculum appears to be unevenly used across schools, and the district has little way of regularly monitoring instructional practice that could help inform systemwide changes in strategy.
- Initiatives are being rolled out without coordination between critical departments. For example--
 - The iPad roll-out lacked coordination between Instructional Technology and the IT group.
- The team was repeatedly told that ineffective or non-existent internal communications and cooperation occurs throughout the district. For example, the team was told that--
 - Assistant Superintendents for Academic Achievement do not appear to have a strong working relationship with the curriculum management office and the content leads,
 - ESL has no regular contact or coordination with the Assistant Superintendents for Academic Achievement,
 - There was a lack of cross-functional cooperation and collaboration between departments,
 - There was little confidence that key "unfiltered" information was forwarded to the superintendent,
 - There was no direct, formal communications protocol for notifying the superintendent of critical incidents, and
 - Operations staff lack of access to principal groups and meetings. Staff reported that they were rarely on principal meeting agendas. Staff articulated they wanted to provide exceptional service to schools and students and believed having more opportunities to meet with principals could enhance service delivery.
- The team found no evidence that departments performed formal surveys to gauge customer satisfaction with services provided or to identify areas of concern.
- The Data Management unit is hampered with filling numerous research requests from universities and other third parties. This practice occurs at the expense of producing high-quality strategic data that can be used in-house.

- The Title I office does not outline any priorities aligned to district academic goals for schools’ use of federal program funds.

Recommended Organizational and Administrative Structure

The following is a high-level proposed or suggested realignment of the district’s organizational and administrative structure (shown below in Exhibits 12-20) designed by the Council to help the district achieve greater operational efficiency and effectiveness in meeting its strategic mission.²³ The suggested organization also has options that leadership might want to consider.

Exhibit 12. Recommended Organizational Structure



❖ Office of the Superintendent

- Retain in the superintendent’s office the Executive Secretary, Assistant Secretary to the Board, and Clerk III, and continue their current roles.
- Retain as direct reports to the superintendent the Chief Academic Officer, Chief Financial Officer, and the Chief Operations Officer.

²³ The team notes that the recommended organizational structure is somewhat like the 2014-2015 JCPS organizational structure in that the Offices of the General Counsel and Internal Audit are reestablished, and the Office of Strategy is placed as a staff position.

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- Reassign or add functions as direct reports to the superintendent,²⁴ including --
 - A Chief of Schools position who would oversee and direct the work of the Assistant Superintendents for Academic Achievement. To reduce each Assistant Superintendent for Academic Achievement's span of control, add one additional Assistant Superintendent for Academic Achievement position,
 - A Chief Information Technology Officer who will be responsible and accountable for all district IT functions, including information and performance technology, computer education support, IT project management, and the immediate strengthening of the district's cyber security plan and systems. These functions were formally in the offices of the Chief Operations Officer and Chief Academic Officer, and
 - A Chief of Staff who would directly supervise Strategy, a new Enterprise Project Management function, and coordinate the work of the Chief Academic Officer, Chief Information Technology Officer, Chief Human Resources Officer (formally Director, Human Resources), Chief Financial Officer, and Chief Operating Officer, who would all report to the superintendent.
- Reposition, reestablish, or add as staff reports to the Office of the Superintendent or the Board of Education the following functions –
 - Internal Audit (oversight is currently outsourced), to include property audit functions currently reporting to the Chief Operations Officer, and existing internal auditors currently reporting to the Chief Financial Officer,
 - Risk Management (formally in Human Resources),
 - General Counsel, whose functions would include providing legal advice and guidance to the Board of Education and the Superintendent, managing compliance and investigations (currently located in the Equity office), reviewing procurement and business functions for adherence to state codes and district policy, reviewing open records requests, and labor relations,²⁵ and
 - Community Relations (encompassing a new government relations function; ombudsman; business partnerships; parent relations, community liaisons, volunteer center (from the Equity Office); and internal and external communications).
- Eliminate the vacant Chief Business Officer position.

²⁴ With the reduction of direct reports to the Superintendent, the Superintendent may want to consider moving from a "Superintendent's Cabinet" format to a "Superintendent's Executive Team" format that would include all direct reports to the Superintendent.

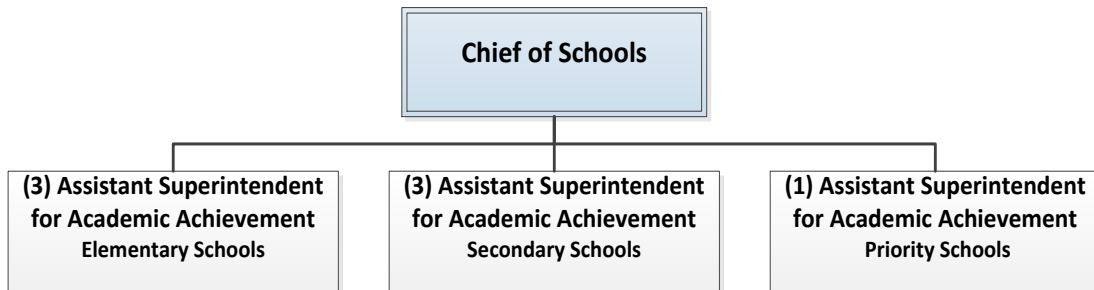
²⁵ The team has concerns that the Office of Human Resources currently lacks the capacity to effectively respond to the nuances of labor relations and negotiations. The placement of labor relations and negotiations in the Office of the General Counsel should be reviewed annually as the new Office of the Chief Human Resources develops proficiencies in these areas. Also, the team left open the option for the superintendent to make the General Counsel part of his cabinet or not.

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- Place the Equity Office as a staff report to the superintendent, and the newly titled Research, Evaluation, and Assessment function (formally Data Management, Planning and Program Evaluation) as a line report to the superintendent.
- Realign the Director II (Priority), Coordinator IV (Middle School Redesign), and Director of School Choice functions to the Chief Academic Officer.

❖ Office of the Chief of Schools

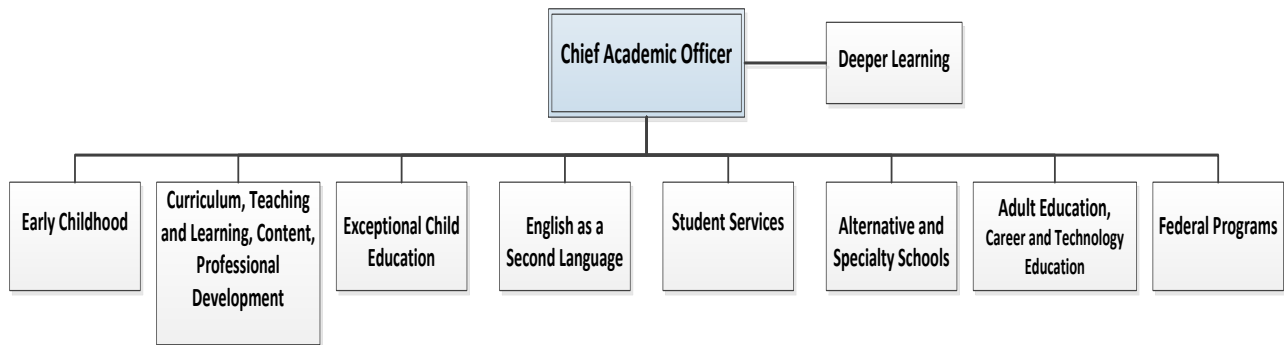
Exhibit 13. Office of the Chief of Schools



- Reduce the span of control of the Chief Academic Officer by transferring the oversight and line responsibilities for these positions to a Chief of Schools.
- Assign one Assistant Superintendent for Academic Achievement to be responsible and accountable for Priority Schools. Reassign the remaining Assistant Superintendent’s for Academic Achievement from geographic “regions” to grade-levels (elementary, middle or high school). To better ensure improved educational outcomes, school level assignments should complement the teaching and administrative experience of the candidates.
- The long-range span of control target for each Assistant Superintendent for Academic Achievement should be approximately twelve schools.

❖ Office of the Chief Academic Officer

Exhibit 14. Office of the Chief Academic Officer



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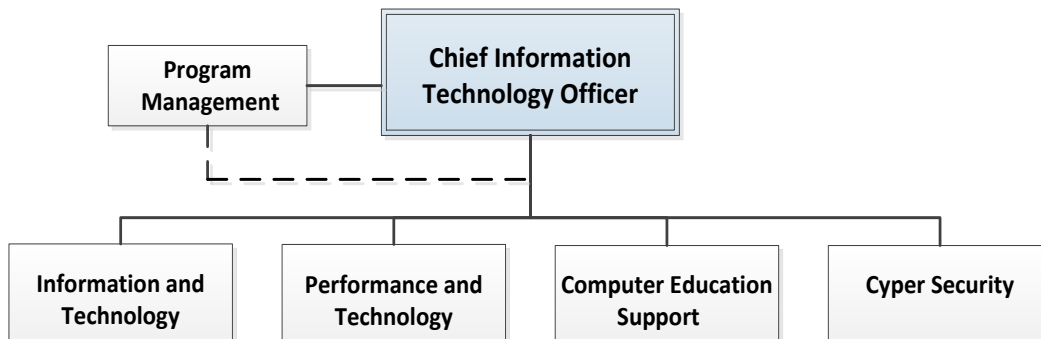
- Overhaul the organizational structure of the office of the chief academic officer with the following direct reports to the CAO: early childhood; curriculum, teaching and learning, and professional development; exceptional child education (special education), English as a second language; student services; alternative and specialty schools; career and technical (CTE) and adult education; and federal programs.
- Have the coordinator of professional and deeper learning report to the CAO as a staff position rather than as a line or operating position.
- Eliminate the positions of assistant superintendent for academic support programs and assistant superintendent for academic services as currently defined in lieu of the structure above.
- Move the activities and athletic functions currently reporting to the Area 1 assistant superintendent to the student services unit under the CAO. Another option for the superintendent would be to place this function under the new chief of schools.
- Move the MTSS and behavioral functions currently reporting to the Area 5 assistant superintendent to either the student services unit or the exceptional child unit.
- Move the coordinator of the Louisville Partnership currently reporting to the assistant superintendent of academic support to the office of the chief of communications and community relations.
- Move the state agency schools and special schools currently reporting to the assistant superintendent of academic support to the new chief of schools position or to the alternative and specialty schools unit under the CAO.
- Move health services currently reporting to the assistant superintendent of academic support to the student services unit under the CAO.
- Move AP and gifted programs currently under the assistant superintendent for academic services to the curriculum, teaching and learning, and professional development unit under the CAO.
- Move the computer education program currently under the assistant superintendent for academic services to either the office of the CIO or to the curriculum, teaching and learning, and professional development unit under the CAO.
- Move the federal Title I and Title II functions currently under the CAO to a federal programs office under the CAO.
- Move the library media services function currently under the assistant superintendent for academic services to the curriculum, teaching and learning, and professional development unit under the CAO.
- Move priority schools currently under the superintendent to one of three places: a staff report to the CAO; under alternative or specialty schools; or under the new chief of schools.

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- Move adult and continuing education currently under the communications office to the office of the CAO.
- Move pupil personnel services currently under the chief of data management to the student support services unit under the CAO.
- Create a dotted line relationship between the Medicaid third-party billing office in the exceptional child unit and the finance office.
- Redeploy central-office-assigned resource teachers back to classrooms or phase them out.

❖ Office of the Chief Information Technology Officer

Exhibit 15. Office of the Chief Information Technology Officer



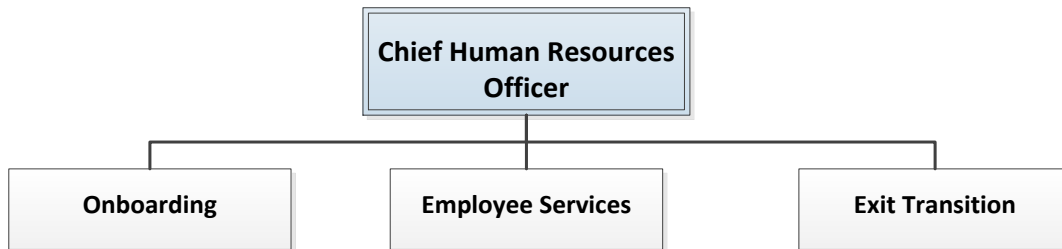
- All IT office functions that currently report to the Office of the Chief Operations Officer would be merged into a new Office of the Chief Information Technology Officer, with the following exceptions --
 - Resource Development would become part of the Superintendent's Enterprise Project Management Office, and
 - Pupil Personnel and Student Assignment would become part of Student Services in the Office of the Chief Academic Officer.
- The Office of the Chief Information and Technology Officer would be charged with supporting and protecting the core technology functions of --
 - The Chief Academic Officer,
 - The Chief Human Resources Officer,
 - The Chief Financial Officer, including payroll and accounting functions,
 - The Chief Operations Officer, including nutrition and transportation services, and
 - Student information systems and state reporting functionality.

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- The office would also be responsible for the development and successful implementation of disaster recovery and business continuity and redundancy plans, to minimize the risk of a catastrophic data loss and ensure the protection, integrity, and availability of critical district systems.

❖ Office of the Chief Human Resources Officer

Exhibit 16. Office of the Chief Human Resources Officer

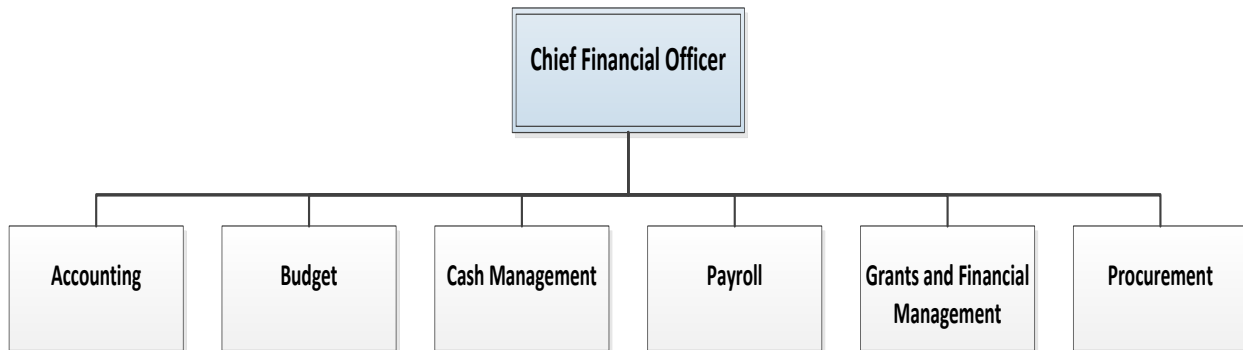


- The current Director, Human Resources position would be upgraded to a Chief Human Resources Officer cabinet-level position.
- The current risk management functions of this office would be transferred to a new enterprise-level position in the Office of the Superintendent.
- The remaining core functions and workflows of the Human Resources Department would be organized and focused on --
 - Onboarding (including recruiting, vetting, and placement of new and promoted employees),
 - Employee Services (including leaves,²⁶ benefits, employee assistance and counseling, classification and compensation, and performance assessment), and
 - Exit and Transition (separation, retirement, and exit interviews).

²⁶ In this instance, a leave is an approved absence from duty for a prescribed period (such as recovering from surgery or on sabbatical or study leave), not one or two days to attend professional development or a conference.

❖ **Office of the Chief Financial Officer**

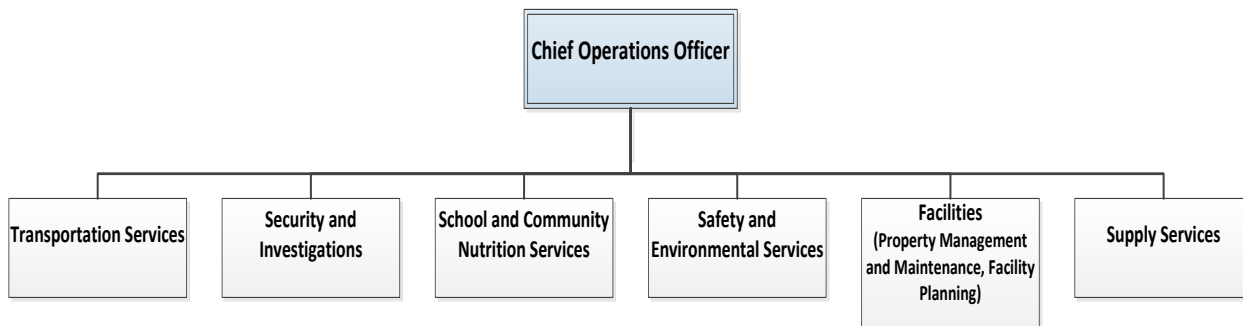
Exhibit 17. Office of the Chief Financial Officer



- Realign Payroll and the Grants and Financial Management functions as direct reports to the Chief Financial Officer.
- Transfer the real estate and acquisition function from Grants Accounting (Office of the Chief Financial Officer) to the newly created Facilities Department in the Office of the Chief Operations Officer.
- Relocate the Fiscal Manager - Operations from the Office of the Chief Operations Officer to the office of Director of Accounting (Office of the Chief Financial Officer), as a continuing direct report.
- Reassign the Insurance Technician position currently assigned to the Coordinator of Grants Accounting to the new Office of Risk Management in the Office of the Superintendent.
- Ensure that Medicaid billing is a shared responsibility with the Exceptional Child Education office and the Office of the Chief Financial Officer.

❖ **Office of the Chief Operations Officer**

Exhibit 18. Office of the Chief Operations Officer

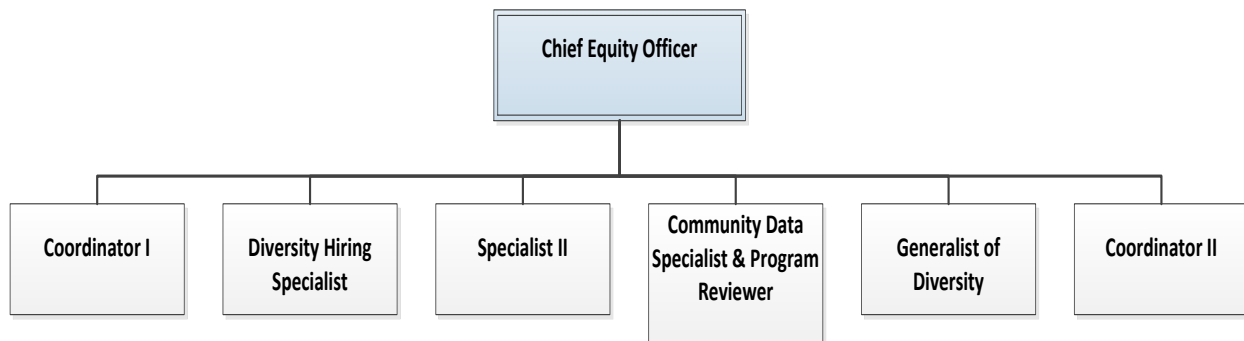


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- Transfer current information and performance technology functions to the new Office of the Chief Information and Technology Officer, who would be a direct report to the superintendent.
- Merge facility planning, and property management and maintenance functions into a new Facilities and Capital Management Department, with the Director reporting to the Chief Operations Officer.
- Maintain supply services and distribution functions within the Office of the Chief Operations Officer and align as a direct report.
- Realign school site School and Community Nutrition Service workers direct supervision from the site administrators to School and Community Nutrition Service staff.
- Realign the supervision and deployment of school site maintenance workers to the new facilities department.
- Transfer the real estate and acquisition function from Grants Accounting (Office of the Chief Financial Officer) to the newly created Facilities Department.
- Relocate the Fiscal Manager - Operations, who is housed in the Office of the Chief Operations Officer, to the office of Director of Accounting (Office of the Chief Financial Officer), who supervises that position.

❖ Office of the Chief Equity Officer

Exhibit 19. Office of the Chief Equity Officer



- Reduce the large span of control of the Chief Equity Officer by realigning and transferring, to more appropriate offices, the following functions --
 - Volunteer Center and Parent Relations to the new Community Relations function reporting to the Office of the Superintendent,
 - Homeless Education to the Office of the Chief Academic Officer (Student Services or Federal Programs),

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- Compliance and Investigations to the new Office of the General Counsel in the Office of the Superintendent, and
- 504 program services to the Exceptional Child Education function in the Office of the Chief Academic Officer.
- Define the office of equity around advocacy, compliance, reporting and watch-dogging equity issues districtwide at a senior level rather than having it also operate specific programs.

Exhibit 20 below compares key spans of control (direct reports) pre and post reorganization.

Exhibit 20. Comparison of Spans of Control Before and After Suggested Reorganization

Spans of Control - Superintendent and Chiefs	Current	Proposed
Superintendent	14	11
Chief Academic Officer	14	9
Chief Equity Officer	10	6
Chief Operations Officer	8	6
Chief of Data Management, Planning and Program Evaluation	7	7
Chief Communications and Community Relations Officer	5	5
Chief Human Resources Officer (Formally Director Human Resources)	5	3
Chief Financial Officer	4	6
Chief of Schools	-	3
Chief Information Technology Officer	-	5
Chief of Staff	-	2

Source: CGCS

Associated Recommendations Based on Interview Findings²⁷

1. Encourage the new superintendent to develop a change-management plan for communicating the organizational changes to the public and staff.
2. Accelerate the recruitment and onboarding of a Chief Academic Officer. This leader, and his or her leadership team, should be responsible for identifying and articulating a coherent set of instructional priorities that should include--
 - a. Clearly stated academic goals and measurable outcomes aligned to the district’s strategic plan,
 - b. A clear and compelling strategy to raise academic achievement across all schools,
 - c. A review of the district’s curriculum to ensure that it clearly informs teachers about both the content they should teach (not how) and the level of understanding students are expected to attain,

²⁷ Recommendations are not listed in any specific order or priority.

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- d. Systemwide accountability for the improvement of academic performance for students,
 - e. The regular monitoring of the instructional program, and
 - f. Reconciling the district’s work on “deeper learning” with other academic priorities and initiatives.
3. Develop departmental comprehensive and definitive business plans with goals, objectives, benchmarks, performance measures, accountabilities, and costs that support the JCPS Mission and Core Values. Department plans should include timelines and process descriptions for, at least, the following activities –
- a. Business plans aligned with the superintendent’s and board’s goals,
 - b. Yearly department initiatives,
 - c. Annual department forecasting, planning, and timelines,
 - d. Budget development,
 - e. Training and professional development,
 - f. Defined performance measures, including KPIs and industry standards for all primary functions of the departments, including manager and supervisor accountability for achieving these measures, and
 - g. An ongoing departmental process improvement program to encourage innovation and continuous improvement.
4. Assemble a team of appropriate district staff²⁸ to identify weaknesses that could place the district at risk or increase district liability. Develop strategies to immediately strengthen critical areas, such as --
- a. Cybersecurity (information breaches, equipment damage, overall network failures, and the potential for intrusion (hacking),
 - b. Information technology infrastructure, programs, and security (risk assessment, the lack security, systems controls, and training to ensure employee access to critical systems such as student information and payroll),
 - c. Audits of district-owned property (inventory) and loss prevention controls, and
 - d. Disaster recovery.

²⁸ Departments at the table could include Information Technology, General Counsel, Office of the Chief of Staff, Office of the Chief Operations Officer, Office of the Chief of Schools, Internal Audit, Risk Management, and others as appropriate.

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5. Communicate clear expectations regarding intra and interdepartmental communication and cooperation. Promote or hire leaders who will lead by example to champion knowledge sharing and collaboration. Ensure regular staff meetings take place at each level with specific agendas, documented minutes of discussions, decisions, and follow-up activities, so employees know--
 - a. The district's and departmental goals and objectives and how they will be achieved,
 - b. How employees will be held accountable for and be evaluated against the goals, and
 - c. That managers and supervisors are responsible for ensuring that information and feedback is disseminated up-and-down, and side-to-side within the organization.
6. Require the Title I office to develop annual strategic priorities for the (appropriate) use of federal program funds. This process should ensure that --
 - a. Needs are identified from input from all Title I stakeholders,
 - b. Priorities are established based on results of needs assessment,
 - c. Annual priorities for federal program activities, spending, and school improvement plans are clearly aligned to district academic goals and priorities, and
 - d. Ongoing evaluations take place to determine success of implementing annual priorities, or the need for revisions.
7. Prioritize the new Enterprise Project Management Office (located in the Office of the Superintendent) with --
 - a. Designing an enterprise-wide program management strategy or governance structure that will coordinate strategic priorities and resolve conflicts,
 - b. Developing controls to ensure the district's leadership team has complete, accurate and timely information for decision making,
 - c. Implementing methodologies and controls to ensure strategies, directions, and instructions from management are coherent and carried out,
 - d. Ensuring new initiatives are fully coordinated with all impacted departments at the planning table, and
 - e. Coordinating cross-functional teams organized around district priorities.
8. Conduct succession planning in all departments to ensure knowledge transfer and the orderly transition of responsibilities.
9. Strengthen the consistency and instructional delivery of Resource Teachers and Goal Clarity Coaches by --

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- a. Developing or reviewing job descriptions for each position with input from instructional leaders and principals,
 - b. Initiating regular planning sessions for staff serving in these positions to assist with consistency of delivery, and
 - c. Evaluating the level at which the incumbents fulfill the required responsibilities for the position and holding the incumbent accountable.
10. Implement programs to measure customer satisfaction, including the use of customer surveys, to identify service concerns and establish future priorities. All district stakeholders should be invited to participate.
11. Invest in making JCPS a more attractive employer by streamlining the online application process by making the procedure more user-friendly for entry-level positions. Design strategies to assist applicants that are not computer savvy to navigate the required online application process, and provide bilingual support, as appropriate.
12. Task the Office of the Chief Human Resource Officer to --
- a. Design and implement specific plans for prioritizing the recruitment and onboarding of highly qualified staff for the district's priority schools,
 - b. Ensure adequate levels of appropriately trained specialists are in place to recruit the necessary quantity of highly qualified certified classroom teaching staff needed for every classroom,
 - c. Verify all job titles and duties reflect the actual functions being performed, reporting lines are consistent with the reorganization, and update as necessary.
 - d. Develop a formal review and approval process to ensure any changes to job descriptions, especially changes to education and experience requirements, reflect the responsibilities of the position,
 - e. Conduct internal and external wage alignment and compensation studies to ensure salary and benefit structures allow JCPS to better compete for and retain employees,
 - f. Ensure all employees are evaluated, at a minimum, on an annual basis, and that performance assessment is linked to measurable outcomes and goals, and
 - g. Review the steps involved to onboard new employees. Identify and eliminate redundancies, reduce the number of "hands" involved in the process, and identify opportunities for "fast-tracking" the candidate whenever possible.
13. Charge the Research Evaluation and Assessment office with --
- a. Explicitly aligning the growth measures on the MAP test with growth needed by students to meet state standards, and

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- b. Developing and implementing a regular process for tracking and evaluating districtwide professional development for the degree to which it is implemented in classrooms and the effect it has on student outcomes.
14. Establish a team of appropriate IT, procurement, academic, and maintenance staff to develop and maintain comprehensive technical specifications for the purchase of technology equipment and establish appropriate refresh cycles.
15. Require departments to identify workflows and processes that are labor intensive, overlap, are outdated or inefficient. Leverage available technology and best practices to mitigate costly legacy practices, which tend to be error-prone and stifle continuous improvement.
16. Ensure that staff from the facilities department are routinely included in all district instructional planning meetings that might require alterations to classroom space or facilities.
17. Require the Research, Evaluation and Assessment office (formally Data Management, Planning, and Program Evaluation) to down-grade the priority for filling research requests from universities and other third parties unless processing the request does not prevent or delay the office from meeting its core function of providing high-quality data to district offices and schools.
18. Ensure the superintendent uses every opportunity to explain the reasons for the reorganization, how it is different from previous ones, and why it is necessary. Utilize the Office of the Chief Communications Officer to communicate early and often about the reorganization by publishing regular updates informing internal and external stakeholders of the “what and the why” of the reorganization plan. Include expectations, approval processes, timeline(s) for implementation, questions and answers, and facilitate the preparation of reorganization discussion materials for departmental staff meetings leading up to implementation.

Organizational Review Synopsis and Comments

The Council of the Great City Schools was asked by the Board of Education to provide a high-level review of the organizational structure of the school system. To conduct this review, the Council assembled a cross-functional team of academic, finance, human resources, organizational, information technology, and operations specialists from other major urban school systems across the country. The team found a wealth of talent in Jefferson County Public Schools and considerable experience and expertise in the central office. At the same time, the team found an organizational structure that was both redundant and incoherent.

There were multiple instances where similar functions were not placed together on the organizational chart; other instances where similar functions were dispersed across various units; and examples of functions that should have been found in the organizational structure but were not. Over time, the district appears to have attempted to solve problems by adding staff with similar responsibilities to multiple departments or by allowing people who did not want to work together to avoid it. The result was not only higher staffing levels, but difficulty in coordinating work, silo-like behavior, and the lack of a common purpose. Ultimately, however, the main issue coming out of the review involved weak direction-setting, poor communications

Organizational Review of the Jefferson County Public Schools

and coordination, and splintered functional alignment.

The Council team also found systems that lacked staff accountability, a lack of security in technology, and data systems that did not appear to drive policy or decision making. The district does not seem to devote much energy to evaluating its multiple programs or asking, on a systemwide basis, why it is not producing better gains in student achievement. The district appeared to have many programs with no coordinated systemwide project or performance management function.

Shortly after our site visit, the Board of Education announced the appointment of Acting Superintendent, Marty Pollio, as the new Superintendent of Schools. The Council team found Dr. Pollio to be acutely aware of the district's organizational challenges and the toll it was taking on the district's effectiveness. He appeared determined to sharpen the system's direction. It was also clear to the Council's team that district staff—and the school board—seemed hungry for leadership, clarity, and course-correction.

There is no reason to believe that the district's very experienced and committed staff will not rise to the occasion if appropriately led by the school board and superintendent. The Council of the Great City Schools emerged from the review very optimistic about the district's future and stands at the ready to help going forward.

ATTACHMENT A. STRATEGIC SUPPORT TEAM

Robert Carlson

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

Michael Casserly

Michael Casserly has served as Executive Director of the Council of the Great City Schools since January 1992. Casserly also served as the organization's Director of Legislation and Research for 15 years before assuming his current position. As head of the urban school group, Casserly unified big city schools nationwide around a vision of reform and improvement; led the nation's largest urban school districts to volunteer for the National Assessment of Educational Progress (NAEP); guided the organization to be the first national education-membership group to call for the Common Core Standards; initiated an aggressive technical assistance program to improve urban education; directed the development of public education's first performance management system; and led the first national study of common practices among the nation's fastest improving urban school districts. He is currently spearheading efforts to boost academic performance in the nation's big city schools; strengthen management and operations; and improve the public's image of urban education. An article in USA Today some years ago called him a "Crusader for Urban Schools." He is a U.S. Army veteran and holds a Ph.D. from the University of Maryland and B.A. from Villanova University.

Willie Burroughs

Willie Burroughs is the Chief Operations Officer for the San Antonio Independent School District accountable for child nutrition, transportation, and facilities (maintenance and construction). He received his B.S. in Industrial Engineering (1992) and an MBA (2001) from Clemson University in Clemson, South Carolina. He was also commissioned as a 2nd Lieutenant into the United States Army Signal Corp (1992). Willie worked for 11 years in a number of leadership roles in manufacturing for Cooper Industries. Roles included, but were not limited to: materials analyst, manufacturing engineer, manufacturing supervisor, production manager, project manager, and operations manager. After a successful career in manufacturing, Willie made the transition to the service industry where he was employed by Aramark as General Manager for maintenance operations with the Houston Independent School District (HISD). After five years of service with Aramark, Willie became an employee directly with the HISD where he served in a number of capacities to include, but not limited to: general manager of construction services (Bond), senior

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manager of contract administration, and senior manager of special projects. Willie served the HISD for nearly 11 years before joining the Dallas Independent School District (DISD) as executive director with responsibilities for maintenance, HVAC, grounds, environmental services, custodial, capital improvement, and energy management where he served for 3.5 years.

José L. Dotres

José L. Dotres is the Chief Human Capital Officer for Miami-Dade County Public Schools (M-DCPS), the fourth largest school district in the nation. Mr. Dotres is charged with overseeing approximately 50,000 employees and collaborating with five labor unions. His career spans over 24 years in various capacities with M-DCPS, to include Principal, District Administrative Director of Leadership Development, Regional Administrative Director of Curriculum and Superintendent of the North Region Area, where he was responsible for 82 public schools across 12 municipalities. He was also Assistant Superintendent of Human Capital Management for Professional Development and was tasked with strengthening the leadership capacity of principals and enhancing the teacher evaluation system. He has also served as Chief of Staff for Superintendent of Schools, Alberto M. Carvalho. Mr. Dotres holds an educational specialist degree in Educational Leadership from the University of Miami, master's degree in Reading from Barry University, and a bachelor's degree for Public Administration from Florida International University.

Judith Marte

Judith Marte is the Chief Financial Officer of the Broward County Public Schools, the 6th largest school district in the nation. Prior to her current position, Ms. Marte served the Miami- Dade County Schools for 15 years in the roles of CFO, Deputy CFO, and Chief Budget Officer. Ms. Marte began her career in Public Accounting with a large firm in Boston, Massachusetts before leaving to start her career in education as the CFO for the Lawrence Public School where she served for 13 years. She has spent many of her years in education working toward equity-based funding in the districts she has served. She has also created opportunities for effective business operations through technology to reduce staffing costs. Ms. Marte completed the Council of Great City Schools Executive Education Program as a member of the first cohort and currently serves a mentoring role for that program. She is the 2016 recipient of the Bill Wise Award in Urban Education. Ms. Marte received her master's in Business Administration from the University of New Hampshire and her Bachelor's in Science from Merrimack College in Massachusetts.

David Palmer

David Palmer, Deputy Director (retired), Los Angeles Unified School District, is a forty-year veteran of school business operations administration. Mr. Palmer's executive responsibilities included the management and oversight of division operations, strategic planning and execution, budget development and oversight, and contract administration. Mr. Palmer oversaw the design and implementation of performance standards, benchmarks and accountabilities for staff and advised the Council of Great City Schools on the *Key Performance Indicator* project. Mr. Palmer was also an instructor in the School Business Management Certificate Program at the University of Southern California. Mr. Palmer currently provides consulting services for school districts and other governmental agencies and is a very active member of the Council's Strategic Support Team.

Arnold Viramontes

Arnold Viramontes retired as the Chief Technology Information Officer for the Houston Independent School District, the largest school system in Texas and the 7th largest in the nation. As the CTIO, he oversaw Information Technology, Instructional Technology and Research, and Accountability. Prior to his work at HISD, he was the Chief of Staff for the Dallas Independent School District. Dallas ISD is the 12th largest school district in the nation. As Chief of Staff, Mr. Viramontes oversaw eleven departments, including the Transformation Management Office, the Communications/Public Relations Department, Emergency Services, Athletics Department and the Office of Evaluation and Accountability. Before taking on his duties as chief of staff, Viramontes served as Chief Transformation Officer and led the restructuring of the Dallas ISD central office. In addition, he facilitated and organized the implementation of Dallas Achieves, which included the realignment of all district offices, and the reallocation of resources. Mr. Viramontes designed a data-decision process using a business intelligence framework. Mr. Viramontes now serves as the CEO of the Viramontes Group, Inc. (VGI), a technology and corporate consulting company he began in 1972, serving clients in the United States, Mexico, and South America. Arnold was the initial Executive Director of the Telecommunications Infrastructure Fund Board (TIF), an agency created by the Texas Public Utility Regulatory Act of 1995. He managed the nation's largest program for investing in telecommunications infrastructure for Internet access and videoconferencing. TIF was charged with disbursing up to \$1.5 billion over a ten-year period to link Texas schools, libraries, higher education institutions, and not-for-profit health care facilities to an advanced telecommunications infrastructure. He is also a Senior Research Fellow at the IC2 Institute at the University of Texas, an organization whose mission is to foster technology, entrepreneurship, and education.

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ATTACHMENT B. WORKING AGENDA

Wednesday, January 31, 2018									
	Academic Services	Operations	Finance	Human Resources	Technology				
	Conference Room 3D	Conference Room 4D	Conference Room 4C	Conference Room 3C	Superintendent's Conference Room				
	Michael Casserly	Willie Burroughs	Judy Marte	Jose Dotres	Arnie Viramontes				
7:00 - 8:15 a.m.	Breakfast Meeting Brown Hotel Dr. Martin Pollio, Superintendent								
8:30 - 9:15 a.m.	Team Working Meeting VanHoose Education Center, Superintendent's Conference Room, 3rd Floor								
9:30 - 10:30 a.m.	Team Interviews VanHoose Education Center, Superintendent's Conference Room, 3rd Floor Amy Dennes , Acting Chief of Staff, Carmen Coleman , Chief Academic Officer Mike Raisor , Chief Operations Officer Cordelia Hardin , Chief Financial Officer Allison Martin , Chief Communications & Community Relations Officer John Marshall , Chief Equity Officer Dena Dossett, Chief Data Management, Planning and Program Evaluation Tiffeny Armour , Director, Human Resources								
10:45 - 11:45 a.m.	Team Interviews VanHoose Education Center, Superintendent's Conference Room, 3rd Floor Marco Manoz , Director II (Priority) Jonathan Lowe , Director, Strategy Cassie Blausey , Director, School Choice Kristin Wingfield , Coordinator, School Business Partnerships (Vacant) , Ombudsman								
12:00 - 12:45 p.m.	Working Luncheon								
1:00 - 2:00 p.m.	Team Interview Carmen Coleman , Chief Academic Officer (With William Kovba, Arnie Viramontes)	1:00 - 1:45 p.m.	Interviews Susan Biasioli , Director, Facility Planning John Niehoff , Architect (With David Palmer)	1:00 - 1:45 p.m.	Interviews John Collopy , Director, Financial Planning & Management Tara Rowland , Budget Coordinator Therese Brennan, Linda Miller , Budget Analysts	1:00 - 1:45 p.m.	Interview Margie Eckerle , Director, Administrator Recruitment and Development		
2:15 - 3:15 p.m.	Team Interview Dena Dossett , Chief Data, Management, Planning & Program Evaluation (With William Kovba, Arnie Viramontes-until 3:00 p.m.)	2:00 - 2:45 p.m.	Interviews David Self, Director, Safety & Environmental Services Joe Irwin , Environmental Coordinator Frederick Bright, Christopher Noe , Safety Inspectors Sheldon Samuels, Coordinator Abatement Program (With David Palmer)	2:00 - 2:45 p.m.	Interviews Eddie Muns , Director Accounting Susan Porter , Coordinator, Accounting Donna Cockerill , Coordinator, Accounts Payable	2:00 - 2:45 p.m.	Interviews O'Dell Henderson , Director, Labor Relations & Employee Relations		
3:15 - 4:00 p.m.	Interview Amy Dennes , Acting Chief of Staff (With Arnie Viramontes)	3:00 - 3:45 p.m.	Interview Mike Raisor , Chief Operating Officer (With William Kovba, David Palmer)	3:00 - 3:45 p.m.	Interviews Ken Poppellwell , Director, Purchasing Wyatt Wynn , Coordinator, Purchasing Kathy Williams , Senior Purchasing/Bid Clerk	3:00 - 3:45 p.m.	Interview Aimee Green-Webb , Director, District Personnel Recruitment & Staffing		
4:00 - 4:45 p.m.	Team Interviews Michelle Dillard, Joe Leffert, Brad Weston, Glenn Baete, Paige Hartstern, Katy Zeitz , Assistant Superintendents, Academic Achievement Areas, & Coordinators, Evaluation & Transition Areas Alicia Averette , Assistant Superintendent, Academic Support Programs Felicia Cummings Smith , Assistant Superintendent, Academic Services Christy Rogers, Director College & Career (CTE)	4:00 - 4:45 p.m.	Interviews Stan Mullen , Director, Security & Investigations Keith Kiper , Coordinator, Internal Security James Hearn , Coordinator, In-School Security Joye Estes, Michael Muhall , Security Investigator (1) (With David Palmer)	4:00 - 4:45 p.m.	Interviews Jim Tenca , CPA with Dean Dorton Ford , Auditor (manages 3 Internal Auditors)	4:00 - 4:45 p.m.	Interviews Sheree Thompson , Human Resources Processing Coordinator vacant, Human Resources Generalist		
5:00 p.m.	Team Discussion of Work Plan for Balance of Site Visit								

Organizational Review of the Jefferson County Public Schools

Thursday, February 01, 2018									
	Academic Services	Operations	Finance	Human Resources	Technology				
	Conference Room 3D	Conference Room 4D	Conference Room 4C	Conference Room 3C	Superintendent's Conference Room				
	<i>Michael Casserly</i>	<i>Willie Burroughs</i>	<i>Judy Marte</i>	<i>Jose Dotres</i>	<i>Arnie Viramontes</i>				
7:00 - 7:45 a.m.	Continental Breakfast Meeting								
8:00 - 8:45 a.m.	Interviews <i>Suzanne Wright</i> , Director, Curriculum Management <i>Denise Carell</i> , Jenni Aberli, ELA Curriculum Specialists (Grades 6-8 & 9-12) <i>Angela Harris</i> , Math Curriculum Specialist (Grades 6-8 & 9-12) ----- Others TBD	8:00 - 9:00 a.m.	Interviews <i>Julia Bauscher</i> , Director, School and Community Nutrition Services <i>Terina Edington</i> , Assistant Director, School and Community Nutrition Services <i>Shawnalee Smith</i> , Coordinator, Nutrition Services Operations <i>Andrea Wright</i> , Coordinator, Nutrition Initiatives <i>Hannah Lehman</i> , Coordinator, Records & Reports <i>Gretchen Boyd</i> , Coordinator, Equipment Specifications, Procurement and Food Safety (With <i>David Palmer</i>)	8:00 - 9:00 a.m.	Interview <i>Cordelia Hardin</i> , Chief Financial Officer (With <i>William Kowba</i> , <i>Arnie Viramontes</i>)	8:00 - 9:00 a.m.	Interviews <i>Kristin Davis</i> , Manager, Benefits <i>Lori Stewart</i> , Benefits Counselor <i>Jack Baldwin</i> , Benefits Specialist <i>Toni Kelman</i> , Leave Center Specialist (With <i>Larry Johnston</i>)		
9:00 - 9:45 a.m.	Interviews <i>Eli Beardsley</i> , Academic Program Consultant III (ESL) <i>Jayne Kraemer</i> , ESL Specialist (Instruction) <i>Livan Lima</i> , Bilingual Language Services Coordinator <i>Berta Weyenberg</i> , ESL Intake Coordinator			9:15 - 10:15 a.m.	Interview <i>Gina Kokojan</i> , Manager Payroll and Cash Management (With <i>Jose Dotres</i>)		9:15 - 10:15 a.m.	Interview <i>Raghu Seshardi</i> , Director, Information Technology (With <i>Willie Burroughs</i> , <i>William Kowba</i> , <i>David Palmer</i>)	
10:00 - 10:45 a.m.	Interviews <i>Florence Chang</i> , Director III, Planning and Program Evaluation <i>Joe Prather</i> , Specialist III Data Management & Research <i>Jimmy Genslinger</i> , Specialist I, System Research Specialist <i>Kyle Underwood</i> , Coordinator, Systems Research <i>Erica Thompson</i> , Specialist III (Testing) <i>Becky Crump</i> , Director Resource Development	10:30 - 11:30 a.m.	Interviews <i>Randy Frantz</i> , Director Transportation Services <i>Shane Redmon</i> , Manager Vehicle Maintenance <i>Brent West</i> , Specialist, Geographic Inform System <i>Sheila Bryant</i> , Manager Operations <i>Jeff Burns</i> , Area Coordinator <i>Karen George</i> , Area Coordinator, <i>Kim Hardin</i> , Bus Driver/Compound Assistant (With <i>David Palmer</i>)	10:30 - 11:30 a.m.	Interviews <i>Franklin Jones</i> , Manager, Grant and Awards Accounting <i>Tommy Knoy</i> , Fiscal Manager, Operations	10:30 - 11:45 a.m.	Interview <i>Tiffany Armour</i> , Director, Human Resources (With <i>William Kowba</i> , <i>Arnie Viramontes</i>)		
11:00 - 11:45 a.m.	Interviews <i>Allison Martin</i> , Chief Communications & Community Relations Officer								
12:00 - 12:45 p.m.	Working Luncheon								

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Thursday, February 01, 2018 (continued)									
	Academic Services	Operations		Finance		Human Resources		Technology	
	Conference Room 3D	Conference Room 4D		Conference Room 4C		Conference Room 3C		Superintendent's Conference Room	
	<i>Michael Casserly</i>	<i>Willie Burroughs</i>		<i>Judy Marte</i>		<i>Jose Dotres</i>		<i>Arnie Viramontes</i>	
1:00 - 1:45 p.m.	Interviews <i>Scott Hooper</i> , Director, Exceptional Child Education <i>Angelique Scherer</i> , Coordinator ECE <i>Eva Stone</i> , District Health Coordinator (With <i>Jose Dotres</i>)	1:00 - 2:00 p.m.	Interviews <i>Rob Tanner</i> , Director, Property Management & Maintenance <i>Mike Reuff</i> , Director, General Maintenance <i>Michael Thomas</i> , Manager, Renovations & Grounds (With <i>David Palmer</i>)	1:00 - 2:00 p.m.	Interviews <i>Gina Lehr</i> , Coordinator, Payroll <i>Stacy Waller</i> , Finance System Technician <i>Lee Ann Robbins</i> , Payroll System Technician <i>Diana Bryant</i> , Payroll Program Assistant	1:00 - 1:45 p.m.			
2:00 - 2:45 p.m.	Interviews <i>Tara Isaacs</i> , Coordinator, Professional & Deeper Learning <i>Susan Price</i> , Specialist I, Professional Learning <i>Jennifer Colley</i> , HR Professional Development Specialist			2:15 - 3:15 p.m.	Interviews <i>Denise Dewitt</i> , Coordinator, Grants and Awards Accounting <i>Pam Johnson</i> , Insurance Technician <i>Marsha Kuffner</i> , Senior Accounting Clerk <i>Kim Wolf</i> , Data Management Technician	2:45 - 3:15 p.m.	Interviews <i>Gina Lehr</i> , Coordinator, Payroll <i>Diana Bryant</i> , Payroll Program Assistant <i>Stacy Waller</i> , Finance System Technician	2:15 - 3:00 p.m.	Interviews <i>Craig Garrison</i> , Performance and Technology <i>Lee Nichols</i> , Coordinator, Technology & Support Services <i>Jonathan Roberts</i> , Supervisor, Call Center <i>Sarah Haley</i> , Manager, Creative Services (With <i>Willie Burroughs</i> , <i>William Kowba</i> , <i>David Palmer</i>)
3:00 - 3:45 p.m.	Interviews <i>Staci Eddleman</i> , Director, Title I/Title II <i>Karen Moore</i> , Fiscal Coordinator <i>Maria Carrico</i> , Chrystal Hawkins, Title I Component Specialists	3:00 - 3:45 p.m.	Interviews <i>Barbara Dempsey</i> , Director, Student Assignment <i>Brent Lynch</i> , Director, Pupil Personnel <i>Jennifer Westerfield</i> , Supervisor Attendance Systems Control (With <i>David</i>)			3:15 - 4:00 p.m.	Interview <i>Tara Isaacs</i> , Coordinator, Professional & Deeper Learning		
3:45 - 4:15 p.m.	Interview <i>John Marshall</i> , Chief of Diversity and Equity								
4:15 - 4:45 p.m.	Interviews <i>Rina Gratz</i> , Director, Early Childhood <i>Scott Young</i> , Early Childhood Operations Specialist <i>Terri Davenport</i> , Early Childhood Compliance Specialist <i>Mike Murphy</i> , Academic Program Consultant					4:00 - 4:45 p.m.	Additional Interviews TBD	4:00 - 4:45 p.m.	Interviews <i>Vacant (Retired)</i> , Assistant Director, Systems Development <i>Annette Harris</i> , Senior Manager, Infrastructure Services <i>Carrie Lawless</i> , Manager, Technology Support Services (With <i>Willie Burroughs</i> , <i>William Kowba</i> , <i>David Palmer</i>)
5:00 p.m.	Team Discussion of Work Plan for Balance of Site Visit								

ATTACHMENT C. DISTRICT PERSONNEL INTERVIEWED

- Martin Pollio, Acting Superintendent
- Amy Dennes, Acting Chief of Staff
- Carmen Coleman, Acting Chief Academic Officer
- Mike Raisor, Chief Operations Officer
- Cordelia Hardin, Chief Financial Officer
- Dena Dossett, Chief, Data Management, Planning and Program Evaluation
- Tiffeny Armour, Director, Human Resources
- Marco Munoz, Director II, Priority Schools
- Jonathan Lowe, Director, Strategy
- Cassie Blausey, Director, School Choice
- Kristin Wingfeld, Coordinator, School Business Partnerships
- Katy Zeitz, Assistant Superintendent, Area 5
- Joe Leffert, Assistant Superintendent, Area 6
- John Ansman, ETC, Area 5
- Kimberly Kent, ETC, Area 6
- Chris Deely, ETC, Area 1
- Felicia Smith, Assistant Superintendent, Academic Services
- Alicia Averette, Assistant Superintendent, Academic Support Programs
- Michelle Dillard, Assistant Superintendent, Area 4
- Chris Perkins, ETC, Area 2
- Brad Weston, Assistant Superintendent, Area 2
- Glenn Baete, Assistant Superintendent, Area 1
- Paige Hartstirm, Assistant Superintendent, Area 3
- Christy Rogers, CCR Director (CTE)—Academies of Louisville
- Suzanne Wright, Director, Curriculum Management
- Denise Carrell, Middle School ELA Specialist
- Jenni Aberli, High School ELA Specialist
- Angela Harris, Secondary 6-12 Math Specialist
- Elisha Beardsley, ESL Coordinator
- Jayne Kraemer, ESL Specialist
- Berta Weyenberg, Coordinator, ESL Intake Center
- Levan Lima, Coordinator, Language Services
- Becky Crump, Resource Development
- Florence Chang, Director, Planning and Program Evaluation
- Erica Thompson, Coordinator, District Assessment
- Joe Prather, Specialist III, Data Management
- Kyle Underwood, Coordinator, Systems Research
- Jimmy Genslinger, Specialist I
- Allison Martin, Chief, Communications and Community Relations
- Eva Stone, Coordinator, District Health
- Scott Hooper, Director, Special Education
- Angelique Scherer, Coordinator, ECE Programs

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- Tara Isaacs, Coordinator, Professional and Deeper Learning
- Susan Price, Specialist, Professional and Deeper Learning
- Karen Moore, Coordinator, Grants and Fiscal Affairs
- Staci Eddleman, Director, Titles I/II/IV
- Chrystal Hawkins, Specialist, Parent and Family Engagement, Title I
- John Marshall, Chief Equity Officer
- Scott Young, Operations Specialist, Early Childhood Education
- Terri Davenport, Compliance Specialist, Early Childhood Education
- Mike Murphy, Early Childhood Special Services
- Rina Gratz, Director, Early Childhood Programs
- David Self, Director, Safety & Environmental Services
- Joe Irwin, Environmental Coordinator
- Frederick Bright, Safety Inspector
- Christopher Noe, Safety Inspector
- Sheldon Samuels, Coordinator Abatement Program
- Stan Mullen, Director, Security & Investigations
- Keith Kiper, Coordinator, Internal Security
- James Hearn, Coordinator, In-School Security
- Joye Estes, Michael Muhall, Security Investigator (1)
- Julia Bauscher, Director, School and Community Nutrition Services
- Terina Edington, Assistant Director, School and Community Nutrition Services
- Shawnalee Smith, Coordinator, Nutrition Services Operations
- Andrea Wright, Coordinator, Nutrition Initiatives
- Hannah Lehman, Coordinator, Records & Reports
- Gretchen Boyd, Coordinator, Equipment Specifications, Procurement and Food Safety
- Randy Frantz, Director Transportation Services
- Shane Redmon, Manager Vehicle Maintenance
- Brent West, Specialist, Geographic Inform System
- Sheila Bryant, Manager Operations
- Jeff Burns, Area Coordinator
- Karen George, Area Coordinator
- Kim Hardin, Bus Driver/Compound Assistant
- Rob Tanner, Director, Property Management & Maintenance
- Mike Reuff, Director, General Maintenance
- Michael Thomas, Manager, Renovations & Grounds
- Barbara Dempsey, Director, Student Assignment
- Brent Lynch, Director, Pupil Personnel
- Jennifer Westerfield, Supervisor Attendance Systems Control
- John Collopy, Director, Financial Planning & Management
- Tara Rowland, Budget Coordinator
- Therese Brennan, Linda Miller, Budget Analysts
- Eddie Muns, Director Accounting
- Susan Porter, Coordinator, Accounting
- Donna Cockerill, Coordinator, Accounts Payable
- Ken Popplewell, Director, Purchasing
- Wyatt Wynn, Coordinator, Purchasing
- Kathy Williams, Senior Purchasing/Bid Clerk

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- Jim Tencza, CPA with Dean Dorton Ford, Auditor
- Gina Kokojan, Manager Payroll and Cash Management
- Franklin Jones, Manager, Grant and Awards Accounting
- Tommy Knoy, Fiscal Manager, Operations
- Gina Lehr, Coordinator, Payroll
- Stacy Waller, Finance System Technician
- Lee Ann Robbins, Payroll System Technician
- Diana Bryant, Payroll Program Assistant
- Denise Dewitt, Coordinator, Grants and Awards Accounting
- Pam Johnson, Insurance Technician
- Marsha Kuffner, Senior Accounting Clerk
- Kim Wolf, Data Management Technician
- Margie Eckerle, Director, Administrator Recruitment and Development
- O'Dell Henderson, Director, Labor Relations & Employee Relations
- Aimee Green-Webb, Director, District Personnel Recruitment & Staffing
- Sheree Thompson, Human Resources Processing Coordinator
- Raghu Seshardi, Director, Information Technology
- Craig Garrison, Performance and Technology
- Lee Nichols, Coordinator, Technology & Support Services
- Jonathan Roberts, Supervisor, Call Center
- Sarah Haley, Manager, Creative Services
- Annette Harris, Senior Manager, Infrastructure Services
- Carrie Lawless, Manager, Technology Support Services
- Brent McKim, Union President
- Jose Alfaro, Recruitment

ATTACHMENT D. DOCUMENTS REVIEWED

- Organizational Charts (2017-2018)
 - January 23, 2018
 - January 9, 2018
 - July 1, 2017
- Organizational Charts (2016-2017)
 - July 1, 2016
 - February 21, 2017
- Organizational Chart (2015-2016)
 - February 23, 2016
- Organizational Chart (2014-2015)
 - September 22, 2014
- Fund Balance 2016-2017, unaudited
- CGCS Central Office Salaries as of January 12, 2017
- Location Numbers with Central Office
- 2017-2018 JCPS Comprehensive District Improvement Plan, Goals and Objectives, revised December 12, 2017
- JCPS Continuous Improvement Planning Cycles
- Central Office Certified Administrator Job Descriptions
- Central Office Classified Administrator Job Descriptions
- Limited Contract of Employment Contract
- School Council Allocation Formula
- Classified A, Job Descriptions
- Classified D, Job Descriptions
- Classified S, Job Descriptions
- A-C Central Office Job Descriptions
- D-E Central Office Certified Job Descriptions
- L-W Central Office Certified Job Descriptions
- Superintendent and Direct Reports
- Chief Academic Officer and Reports
- Chief Financial Officer and Reports
- Chief of Data Management, Planning, and Program Evaluation and Reports
- Chief Operations Officer and Reports
- Director of Human Resources and Reports
- Central Office Position Control, January 18, 2018
- JCPS School Allocation Standards for Usage in FY 2017-2018, January 2017
- JCPS School Allocation Standards for Usage in FY 2018-2019, January 2018
- JCPS Administrative Directory, 2017-2018
- KRS, 160.431, School Finance Officer-Certification Requirements-Continuing Education-Financial Reports
- KRS, 160.560, Treasurer of Board of Education-Selection-Bond-Duties
- John D. Collopy's Resume, May 13, 2015
- Five-Year Enrollment Projections, December 21, 2017

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- JCPS Enrollment Trend
- W.E. DuBois Academy, Student Highlights, Quick Facts, and Creed
- Diversity, Equity, and Poverty Programs. April 2017 Battery of Programs
- Data Management, Planning, and Program Evaluation Division, 2016-17 Accomplishments
- JCPS Planning and Program Evaluation Department, What We Do, What You Gain, and Why We Do it
- Jefferson County Public Schools, 2016-17 KDE Next Generation Learners Score Ranking
- Priority Schools—Student Data
- University of Virginia, Partnership for Leaders in Education. Readiness Assessment Report, Jefferson County Public Schools Turnaround Initiative, February 13-15, 2017
- News Article: Districts Give New Life to School Buses, January 24, 2018
- Transportation Fact Sheet
- Transportation Management Leadership Program Materials
- 17-18 Transportation Budget Request Summary
- Transportation Statistics
- Jefferson County Technology Pilot for Transportation
- Performance Management – Nutrition Services, February 1, 2018
- Operations – All Departments Report
- Work Orders Open Longer than 90 Days
- Work Orders Opened by Month
- Maintenance Department Metrics
- Facilities Planning PowerPoint
- CGCS Review: *Staffing Levels in the Jefferson County Schools, 2009*

ATTACHMENT E. COUNCIL REVIEWS

History of Strategic Support Teams

The following is a history of the Strategic Support Teams provided by the Council of the Great City Schools to urban school districts over the last 20 years.

City	Area	Year
Albuquerque		
	Facilities and Roofing	2003
	Human Resources	2003
	Information Technology	2003
	Special Education	2005
	Legal Services	2005
	Safety and Security	2007
	Research	2013
	Human Resources	2016
Anchorage		
	Finance	2004
	Communications	2008
	Math Instruction	2010
	Food Services	2011
	Organizational Structure	2012
	Facilities Operations	2015
	Special Education	2015
	Human Resources	2016
Atlanta		
	Facilities	2009
	Transportation	2010
Austin		
	Special Education	2010
Baltimore		
	Information Technology	2011
Birmingham		
	Organizational Structure	2007
	Operations	2008
	Facilities	2010
	Human Resources	2014
	Financial Operations	2015
Boston		
	Special Education	2009
	Curriculum & Instruction	2014
	Food Service	2014
	Facilities	2016
Bridgeport		
	Transportation	2012
Broward County (FL)		
	Information Technology	2000

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	Food Services	2009
	Transportation	2009
	Information Technology	2012
Buffalo		
	Superintendent Support	2000
	Organizational Structure	2000
	Curriculum and Instruction	2000
	Personnel	2000
	Facilities and Operations	2000
	Communications	2000
	Finance	2000
	Finance II	2003
	Bilingual Education	2009
	Special Education	2014
Caddo Parish (LA)		
	Facilities	2004
Charleston		
	Special Education	2005
	Transportation	2014
Charlotte-Mecklenburg		
	Human Resources	2007
	Organizational Structure	2012
	Transportation	2013
Cincinnati		
	Curriculum and Instruction	2004
	Curriculum and Instruction	2009
	Special Education	2013
Chicago		
	Warehouse Operations	2010
	Special Education I	2011
	Special Education II	2012
	Bilingual Education	2014
Christina (DE)		
	Curriculum and Instruction	2007
Cleveland		
	Student Assignments	1999, 2000
	Transportation	2000
	Safety and Security	2000
	Facilities Financing	2000
	Facilities Operations	2000
	Transportation	2004
	Curriculum and Instruction	2005
	Safety and Security	2007
	Safety and Security	2008
	Theme Schools	2009
	Special Education	2017
Columbus		
	Superintendent Support	2001
	Human Resources	2001

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	Facilities Financing	2002
	Finance and Treasury	2003
	Budget	2003
	Curriculum and Instruction	2005
	Information Technology	2007
	Food Services	2007
	Transportation	2009
Dallas		
	Procurement	2007
	Staffing Levels	2009
	Staffing Levels	2016
Dayton		
	Superintendent Support	2001
	Curriculum and Instruction	2001
	Finance	2001
	Communications	2002
	Curriculum and Instruction	2005
	Budget	2005
	Curriculum and Instruction	2008
	Organizational Structure	2017
Denver		
	Superintendent Support	2001
	Personnel	2001
	Curriculum and Instruction	2005
	Bilingual Education	2006
	Curriculum and Instruction	2008
	Common Core Implementation	2014
Des Moines		
	Budget and Finance	2003
	Staffing Levels	2012
	Human Resources	2012
	Special Education	2015
	Bilingual Education	2015
Detroit		
	Curriculum and Instruction	2002
	Assessment	2002
	Communications	2002
	Curriculum and Assessment	2003
	Communications	2003
	Textbook Procurement	2004
	Food Services	2007
	Curriculum and Instruction	2008
	Facilities	2008
	Finance and Budget	2008
	Information Technology	2008
	Stimulus planning	2009
	Human Resources	2009
	Special Education	2018
Fresno		

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	Curriculum and Instruction	2012
Guilford County		
	Bilingual Education	2002
	Information Technology	2003
	Special Education	2003
	Facilities	2004
	Human Resources	2007
	Transportation	2017
Hillsborough County		
	Transportation	2005
	Procurement	2005
	Special Education	2012
	Transportation	2015
Houston		
	Facilities Operations	2010
	Capitol Program	2010
	Information Technology	2011
	Procurement	2011
Indianapolis		
	Transportation	2007
	Information Technology	2010
	Finance and Budget	2013
Jackson (MS)		
	Bond Referendum	2006
	Communications	2009
	Curriculum and Instruction	2017
Jacksonville		
	Organization and Management	2002
	Operations	2002
	Human Resources	2002
	Finance	2002
	Information Technology	2002
	Finance	2006
	Facilities operations	2015
	Budget and finance	2015
Kansas City		
	Human Resources	2005
	Information Technology	2005
	Finance	2005
	Operations	2005
	Purchasing	2006
	Curriculum and Instruction	2006
	Program Implementation	2007
	Stimulus Planning	2009
	Human Resources	2016
	Transportation	2016
	Finance	2016
	Facilities	2016
	Curriculum and Instruction	2016

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Little Rock		
	Curriculum and Instruction	2010
Los Angeles		
	Budget and Finance	2002
	Organizational Structure	2005
	Finance	2005
	Information Technology	2005
	Human Resources	2005
	Business Services	2005
Louisville		
	Management Information	2005
	Staffing Levels	2009
	Organizational Structure	2018
Memphis		
	Information Technology	2007
	Special Education	2015
	Food Services	2016
	Procurement	2016
Miami-Dade County		
	Construction Management	2003
	Food Services	2009
	Transportation	2009
	Maintenance & Operations	2009
	Capital Projects	2009
	Information Technology	2013
Milwaukee		
	Research and Testing	1999
	Safety and Security	2000
	School Board Support	1999
	Curriculum and Instruction	2006
	Alternative Education	2007
	Human Resources	2009
	Human Resources	2013
	Information Technology	2013
Minneapolis		
	Curriculum and Instruction	2004
	Finance	2004
	Federal Programs	2004
	Transportation	2016
	Organizational Structure	2016
Nashville		
	Food Service	2010
	Bilingual Education	2014
	Curriculum and Instruction	2016
Newark		
	Curriculum and Instruction	2007
	Food Service	2008
New Orleans		
	Personnel	2001

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	Transportation	2002
	Information Technology	2003
	Hurricane Damage Assessment	2005
	Curriculum and Instruction	2006
New York City		
	Special Education	2008
Norfolk		
	Testing and Assessment	2003
	Curriculum and Instruction	2012
Omaha		
	Buildings and Grounds Operations	2015
	Transportation	2016
Orange County		
	Information Technology	2010
Palm Beach County		
	Transportation	2015
Philadelphia		
	Curriculum and Instruction	2003
	Federal Programs	2003
	Food Service	2003
	Facilities	2003
	Transportation	2003
	Human Resources	2004
	Budget	2008
	Human Resource	2009
	Special Education	2009
	Transportation	2014
Pittsburgh		
	Curriculum and Instruction	2005
	Technology	2006
	Finance	2006
	Special Education	2009
	Organizational Structure	2016
	Business Services and Finance	2016
	Curriculum and Instruction	2016
	Research	2016
Portland		
	Finance and Budget	2010
	Procurement	2010
	Operations	2010
Prince George's County		
	Transportation	2012
Providence		
	Business Operations	2001
	MIS and Technology	2001
	Personnel	2001
	Human Resources	2007
	Special Education	2011
	Bilingual Education	2011

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Puerto Rico		
	Hurricane Damage Assessment	2017
Reno		
	Facilities Management	2013
	Food Services	2013
	Purchasing	2013
	School Police	2013
	Transportation	2013
	Information Technology	2013
Richmond		
	Transportation	2003
	Curriculum and Instruction	2003
	Federal Programs	2003
	Special Education	2003
	Human Resources	2014
Rochester		
	Finance and Technology	2003
	Transportation	2004
	Food Services	2004
	Special Education	2008
Sacramento		
	Special Education	2016
San Antonio		
	Facilities Operations	2017
	IT Operations	2017
	Transportation	2017
	Food Services	2017
San Diego		
	Finance	2006
	Food Service	2006
	Transportation	2007
	Procurement	2007
San Francisco		
	Technology	2001
St. Louis		
	Special Education	2003
	Curriculum and Instruction	2004
	Federal Programs	2004
	Textbook Procurement	2004
	Human Resources	2005
St. Paul		
	Special Education	2011
	Transportation	2011
	Organizational Structure	2017
Seattle		
	Human Resources	2008
	Budget and Finance	2008
	Information Technology	2008
	Bilingual Education	2008

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	Transportation	2008
	Capital Projects	2008
	Maintenance and Operations	2008
	Procurement	2008
	Food Services	2008
	Capital Projects	2013
Toledo		
	Curriculum and Instruction	2005
Washington, D.C.		
	Finance and Procurement	1998
	Personnel	1998
	Communications	1998
	Transportation	1998
	Facilities Management	1998
	Special Education	1998
	Legal and General Counsel	1998
	MIS and Technology	1998
	Curriculum and Instruction	2003
	Budget and Finance	2005
	Transportation	2005
	Curriculum and Instruction	2007
	Common Core Implementation	2011
Wichita		
	Transportation	2009
	Information Technology	2017