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Charlotte-Mecklenburg Schools  
Strategic Plan 2010

**Educating  
Students to  
Compete  
Locally,  
Nationally and  
Internationally.**

**Global competitiveness starts here.**





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# CMS STRATEGIC PLAN 2010

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## INTRODUCTION

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For many years, Charlotte-Mecklenburg Schools (CMS) has sought “to become the premier urban, integrated system in the nation.” At its inception, that vision was audacious, viewed by many as completely unattainable. Years later, significant work remains. But it is also true that a focus on equity and student success, coupled with unwavering commitment and hard work by many people and agencies, has brought us to excellence in many ways. The goal of being the premier urban system no longer seems audacious. Instead, over the past decade, many national experts and observers have singled out CMS as one of the best school districts in America. Some examples:

- In 2002, CMS was one of four school districts across the country recognized by the Council of the Great City Schools for improving academic achievement and narrowing the achievement gap. CMS has also been recognized by the council as a school district “Beating the Odds” by improving academic achievement for all students despite high levels of poverty and other risk factors.
- In 2004, CMS was a finalist for the national Broad Prize, which recognizes the top urban school districts for improving academic achievement and narrowing the achievement gap.
- In 2005, CMS became the first large school district in the nation to receive a district-wide accreditation quality achievement award from the Southern Association of Colleges and Schools (SACS). CMS was also honored by SACS as a high-quality school district.
- In 2005, four CMS high schools were ranked among the nation’s top 100 by *Newsweek* magazine, and 14 were ranked among the top 900 for providing students access to the most challenging academic courses. CMS has more students enrolled in Advanced Placement courses than do many states, and was the first district in North Carolina to offer the prestigious International Baccalaureate Diploma.

Significant gains in student achievement support those accolades. Again, some examples:

- In December 2003, fourth- and eighth-grade students at CMS outperformed their peers and most states across the country on the National Assessment for Educational Progress (NAEP), otherwise known as the Nation’s Report Card. In addition, most subgroups of students at CMS outperformed peer subgroups in the nation.



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**The 2003 NAEP Subgroup Report (Scale Scores)**

**Grade 4**

Ethnicity	Math		Reading	
	Nation	CMS	Nation	CMS
White	243	257	227	237
Black	216	229	197	205
Hispanic	221	233	199	202
All Students	234	242	216	219

**Grade 8**

Ethnicity	Math		Reading	
	Nation	CMS	Nation	CMS
White	287	301	270	278
Black	252	258	244	247
Hispanic	258	262	244	244
All Students	276	279	261	262

- In December 2005, CMS students scored higher than their peers and most states in fourth-grade reading and mathematics, and eighth-grade reading on the NAEP. In eighth-grade math, CMS students performed better than most other states and all other peers except Austin, Texas, which had scores equal to those at CMS. In addition, most subgroups of students at CMS outperformed peer subgroups in the nation.



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**The 2005 NAEP Subgroup Report (Scale Scores)**

**Grade 4**

Ethnicity	Math		Reading	
	Nation	CMS	Nation	CMS
White	246	261	224	240
Black	220	230	199	206
Hispanic	225	234	201	209
All Students	237	244	217	221

**Grade 8**

Ethnicity	Math		Reading	
	Nation	CMS	Nation	CMS
White	288	304	269	278
Black	254	264	242	244
Hispanic	261	262	245	248
All Students	278	281	260	259

- The top 10 percent of the graduating class of 2005 scored 1205 on the SAT, compared to 1187 for the top 10 percent of students in North Carolina and 1191 for the top 10 percent of students in the United States.

**SAT Scores for Top 10 percent of Graduating Class**

	2005	2006
CMS	1205	1792*
NC	1187	1745*
US	1191	1761*

\*For 2006, the SAT was revised to include a writing component, making the maximum score 2400, rather than 1600. The top 10 percent of the graduating class of 2006 scored 1792 on the SAT, compared to 1745 of the top 10 percent of students in North Carolina and 1761 for the top 10 percent of students in the United States.



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- Since 1995-96, the number of third-grade students scoring at or above grade level on the North Carolina End-of-Grade (EOG) reading test has increased by 25 percentage points, or nearly 41 percent.

Grade 3

1995-96	2006
61 percent	86 percent

- The number of African-American students reading on grade level in fifth grade has more than doubled in a decade. It rose to 84 percent in 2005, up from 35 percent in 1995-96. The percentage of all students on grade level rose to 90 from 59 in the same period. In 2006, the percentage of fifth-graders reading on grade level stayed at 90; for African-American students, it increased to 85.7 percent.

The NAEP results are particularly noteworthy because the tests are considered rigorous. The North Carolina EOG assessments have been criticized by some as too easy.

Because CMS students had achieved success on both the NAEP and EOG assessments, two years ago the Charlotte-Mecklenburg Board of Education (Board of Education) took up a momentous question. Should CMS continue with its quest to make its vision a reality, or should CMS chart a new course? After many months of analysis, deliberation and debate, the Board of Education chose a new course.

In February 2006, the Board of Education adopted a new Vision. In a single and simple sentence, it sets an even bolder standard: "CMS provides all students the best education available *anywhere*, preparing every child to lead a rich and productive life." (Emphasis added.)

This statement directs CMS aspirations far above the goals set by the country's other large school districts. The Board of Education has challenged itself and this community to establish a public school system that educates its students better than any other district in this nation and, indeed, the world. The Board of Education expects CMS to produce students who can compete locally, nationally and internationally. Given the global village our children will inhabit, that bold vision is appropriate. It acknowledges the current status of CMS as a very good school district. It also acknowledges that students in many parts of the world have begun to outperform American schoolchildren in critically important subjects such as math and science. In 2006, the United States produced six Nobel Prize winners. All of them were educated in public schools. This is the standard of education that CMS must strive to deliver.

While working on the new standard, Board of Education members joined others across the state in encouraging the State Board of Education to make state assessments more rigorous. In 2005-06, the state did raise the bar in the EOG math tests for grades three through eight. Not surprisingly, the tougher standard brought





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large decreases in scores statewide, including in CMS. It also increased achievement gaps among various subgroups of students in many districts, including CMS. Despite these changes, CMS students still outperformed the state in all elementary grades and eighth grade.

The task CMS has chosen is not easy: Educate more than 133,000 students from pre-kindergarten through 12th grade, and do it better than anyone else. Moreover, it will get harder down the road. CMS expects to enroll 50,000 additional students in the next decade, many of whom will be challenged by circumstances outside district control, such as poverty and learning English as a second language. For CMS to succeed will require significant work by educators, support staff, parents, students and the community at large. It will also require adequate resources. Perhaps most difficult is this: It will require a complete change in the mindset of everyone involved. Although CMS unquestionably does a good job educating many of our students, we can no longer be satisfied with that. We must educate all students, not merely some of them.

The Board of Education has also provided the schools a sturdy framework to realize its Vision. That framework includes a new Mission, a set of Core Beliefs and Commitments, a Theory of Action for change, and some reform policies. These are collectively referred to as the Board of Education's Reform Documents.

In the spring of 2006, the Board of Education also decided to employ new leadership. Dr. Peter C. Gorman was chosen as the new superintendent and began work July 2, 2006.

Upon arrival, Dr. Gorman presented his Superintendent's Entry Plan to the Board of Education and the community. The plan established a set of activities that guided his transition to the role of superintendent at CMS. All executive leadership transition is critical, and this case was no different. These activities were designed to enable the new superintendent to gather quickly information about the community and the organization; to establish early on a strong community presence; to assess the organization's strengths and weaknesses; to identify critical issues; to correct weaknesses; to build on strengths; and, to create a network of contacts and resources to help in the work of improving CMS.

The Superintendent's Entry Plan can be viewed on the CMS Web site, as can a summary of the activities undertaken by the superintendent in executing the plan.

As part of his entry plan, Dr. Gorman conducted a "listening and learning tour" during his first 100 days as superintendent, familiarizing himself with CMS and the larger community. Dr. Gorman and CMS administrative leadership also reviewed data on academic achievement and business operations, and developed this strategic plan (the Plan) to realize the Board of Education's Vision. The Plan is directly aligned with the Board of Education's Reform Documents. The Plan has seven goals, each discussed in further detail in Goals I through VII:



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**I. High Academic Achievement**

**II. Effective Educators**

**III. Adequate Resources and Facilities**

**IV. Safe and Orderly Schools**

**V. Freedom and Flexibility with Accountability**

**VI. World-Class Service**

**VII. Strong Parent and Community Connections**

As outlined in this Plan, each goal has objectives, strategies for reaching those objectives, start dates for the strategies, how the objectives will be measured and how the administration will hold itself and others accountable for the results. The strategies outlined in this Plan are not all-inclusive. Rather, they represent the major initiatives that will be in place by 2010 to meet the goals listed. The start date for each strategy refers to the date when it should begin; however, each start date is subject to change based on various factors, such as having adequate funding to successfully complete the strategy.

This Plan builds on existing strengths from the district's previous strategic plan, Achieving the CMS Vision: Equity and Student Success. For example, a system modeled on corporate management was used to execute that plan, and a similar system (outlined at the end of this document) will be used to execute this Plan as well.

Achieving the new goals will take time, but some dramatic action and changes must — and will — occur immediately. More actions and changes will follow, as additional plans and strategies are developed and/or refined. All of this work will require dedication and the sustained commitment of many partners, including educators, parents, students, taxpayers, and civic and community members. To succeed, CMS must enhance what has worked well before, adding effective projects and programs with proven, measurable results. We must also let go of projects and programs that do not increase student achievement in measurable ways. With limited financial resources, CMS must use only programs proven to work.

Most important, we must keep in mind the overarching purpose of this work: educating our students for the future. We must prepare them to reach beyond today's scores, today's tests and today's challenges. If we do not, we will have sentenced our children to a lifetime of the only kind of poverty that is permanent: a lack of opportunity. We must educate our students well and equip them with the skills to change and grow as the world changes and grows. We must educate them to compete locally, nationally and internationally. The work of making CMS students globally competitive begins with this Plan.



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# CMS GOALS 2010

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## CMS GOALS 2010<sup>1</sup>

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### High Academic Achievement

1. Eighty percent of schools will make expected or high growth on ABCs (54 percent as of 2005-06).
2. Ninety-five percent of students will achieve at or above standard on reading End-of-Grade (EOG) tests in grades three through eight (85 percent as of 2005-06).
3. Eighty-eight percent of students will achieve at or above standard on mathematics (EOG) tests in grades three through eight (65 percent as of 2005-06).
4. Eighty percent of students will achieve at or above standard on science (EOG) tests in grades three through eight (testing will begin in 2008-09).
5. Eighty percent of students will achieve at or above standard on state writing assessment in grades four, seven and 10 (52 percent as of 2005-06).
6. Eighty percent of students achieving at or above standard on the End-of-Course (EOC) composite tests (66 percent as of 2005-06).
7. Disparity based on race, ethnicity and socioeconomic status will not exceed 10 percentage points on all academic measures.
8. Students graduating on time will increase by 3 percent each year (72 percent as of 2005-06).
9. The number of students who drop out will decrease by 3 percent each year (23 percent as of 2005-06).
10. CMS will meet or exceed the national average on Advanced Placement exams (combined scores) with scores of 3, 4 or 5 (42 percent as of 2005-06, compared to the national average of approximately 62 percent).
11. Seventy-five percent of students will meet or exceed the national average on the SAT, while the percentage of students who take the test will also increase (50 percent met or exceeded the national average as of 2005-06; 69 percent of graduates took the test).
12. CMS will meet or exceed the national average on nationally normed tests in math, reading and writing.

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<sup>1</sup>CMS Goals 2010 go through the end of the 2009-2010 fiscal year, which ends June 30, 2010.



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13. CMS students will meet or exceed the national average on the National Assessment for Educational Progress (NAEP, also called the Nation's Report Card) in reading, mathematics and science.

### **Effective Educators**

1. CMS will increase the percentage of its schools with effective teaching staff. That effectiveness will be measured by subjective and objective evaluations, and the percentage will be set after a district-wide accountability system required by CMS Board of Education Policy AE has been adopted.
2. At least 99.4 percent of the teaching positions will be filled by the first day of school and remain so throughout the school year. This will be measured by periodic checks of staffing during the school year. (This year, 99.0 percent of teaching jobs were filled on the first day; we have no first-day data for other certified and non-certified staff. On September 29, 2006, 98.8 percent of licensed-staff positions were filled; non-licensed staff was 95.9 percent). CMS will also have all other certified positions and non-certified positions filled at high percentages.
3. At least 95 percent of the schools will have all teaching positions filled by the first day of school and will keep them filled throughout the school year. This will be measured by periodic checks throughout the school year (68 percent [109 schools] as of the start of the 2006-07 school year).
4. Targeted schools (Currently identified as FOCUS [Finding Opportunities; Creating Unparalleled Success]). These are the schools with high levels of student poverty that were formerly designated EquityPlus Schools) within CMS will be staffed with teachers and administrators who have the same experience and degrees as the two-year average for teachers in the CMS Schools of Excellence and Distinction as defined by ABC rankings.

### **Adequate Resources and Facilities**

#### *Instructional Materials and Supplies, Technology, Co-Curricular Activities*

1. All schools will be equipped with CMS-standard instructional materials and supplies (53 percent of all schools; 100 percent of all FOCUS schools as of January 2005).
2. All schools will meet CMS standards for technology (85 percent at a student/computer ratio of 5:1 as of January 2005).
3. All schools will meet the CMS standard number of co-curricular activities (55 percent as of January 2005).



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### *Facilities*

1. Sixty-five percent of schools will meet baseline standards (46 percent as of August 2006).
2. There will be a 15 percent reduction in the number of temporary classrooms (there were 1,059 units as of August 2006).

### **Safe and Orderly Schools**

1. Eighty percent of students will indicate they feel safe at school.
2. Seventy percent of parents will indicate they believe schools are safe.
3. Seventy percent of community members will indicate they believe schools are safe.
4. All schools will score at or above 90 percent on an annual safe school audit.
5. The number of state-reportable incidents of inappropriate behavior per 1,000 students will decrease by 10 percent (6.7 per 1000 as of 2005-06).

### **Freedom and Flexibility with Accountability**

1. Eighty-five percent of schools will receive the top rating(s) on the CMS Accountability System.
2. Sixty-eight percent of schools will make Adequate Yearly Progress under the federal No Child Left Behind standard (35.2 percent [50 schools] as of 2005-06).

### **World-Class Service**

1. Eighty percent of employees, parents and community members will agree CMS provides timely, accurate and responsive service on annual satisfaction surveys and polls.
2. CMS will deliver project charters developed for this Plan on time, on budget and at or above the expectation of the customer.

### **Strong Parent and Community Connections**

1. Seventy percent of CMS parents will agree CMS is doing a good job and is headed in the right direction.



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2. Seventy percent of community members will agree CMS is doing a good job and is headed in the right direction.
3. Seventy percent of parents and community members will agree CMS schools are safe.
4. Seventy-five percent of parents will agree their child's school does a good job of keeping them informed and responding to requests.
5. More than half of parents and community members will agree CMS is a good steward of taxpayer resources.
6. More than half of parents and community members will agree CMS is responsive to requests and keeps them informed.
7. The number of district-sponsored partnerships that focus on improving academic achievement and increasing school safety will increase by 25 percent.
8. The number of volunteer hours devoted to improving academic achievement and mentoring at-risk youth will increase by 25 percent.



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# STRATEGIES AND TIMELINES

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## I. HIGH ACADEMIC ACHIEVEMENT

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### A. Overview

The Board of Education's bold Vision requires CMS to provide all its students the best education available anywhere. Furthermore, the Board of Education has committed the school system to achieving three goals: 1) Provide all students with the opportunity to perform to their fullest potential; 2) Ensure there is no discernible achievement gap among students based on race, gender or economic level; and, 3) Prepare all students to be successful in institutions of higher learning or the workforce without remediation. In addition, we must better prepare and expose our students for the world within which they will live.

In order to make that Vision a reality, CMS must intensify its efforts throughout all grade levels. CMS will need to continue successful programs and apply them consistently across the district. Ineffective programs must be retired and replaced with new initiatives that increase student achievement.

While some students will always need extra help, we must also work to accelerate academic progress. We believe that students will rise to meet, and often surpass, high expectations. So we must set high expectations, and increase them over time.

### B. Objectives by 2010

1. Eighty percent of schools will make expected or high growth on ABCs (54 percent as of 2005-06).
2. Ninety-five percent of students will achieve at or above standard on reading End-of Grade (EOG) tests in grades three through eight (85 percent as of 2005-06).
3. Eighty-eight percent of students will achieve at or above standard on mathematics (EOG) tests in grades three through eight (65 percent as of 2005-06).
4. Eighty percent of students will achieve at or above standard on science (EOG) tests in grades three through eight (testing will begin in 2008-09).
5. Eighty percent of students will achieve at or above standard on the EOG writing assessment in grades four, seven and 10 (52 percent as of 2005-06).
6. Eighty percent of students will achieve at or above standard on the End-of-Course (EOC) composite tests (66 percent as of 2005-06).



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7. Disparity based on race, ethnicity and socioeconomic status will not exceed 10 percentage points on all academic measures.
8. Students graduating on time will increase by 3 percent each year (72 percent as of 2005-06).
9. The number of students who drop out will decrease by 3 percent each year (23 percent as of 2005-06).
10. CMS will meet or exceed the national average on Advanced Placement exams (combined scores) with scores of 3, 4 or 5 (42 percent as of 2005-06, compared to the national average of approximately 62 percent).
11. Seventy-five percent of students will meet or exceed the national average on the SAT, while the percentage of students who take the test will also increase (50 percent met or exceeded the national average as of 2005-06; 69 percent of graduates took the test).
12. CMS will meet or exceed the national average on nationally normed tests in math, reading and writing.
13. CMS students will meet or exceed the national average on the National Assessment for Educational Progress (NAEP, also called the Nation's Report Card) in reading, mathematics and science.

### C. Strategies

In addition to continuing educational strategies that have proven successful, such as Open Court, direct instruction and early interventions through pre-school, CMS will:

- I. Refine the K-8 comprehensive reading model.

Because CMS wants students reading by the end of first grade, we will continue the Open Court Reading series and the 90-minute daily reading block in kindergarten through fifth grade. The reading series has been effective. We will supplement it with other programs for acceleration and remediation as needed.

CMS will provide a narrower K-3 curriculum for students not reading on grade level to ensure all students are reading by third grade. Students will be assessed at the beginning of each school year, and those identified as struggling will receive an intensive Open Court reading curriculum. The general curriculum for these students will be replaced with intensive reading instruction during the school day, focusing on phonics, phonemic awareness, fluency, vocabulary and comprehension. Students will stay in this intensive curriculum until they are reading at grade level.

To boost reading performance in grades six through eight, students reading below grade level will take a mandatory reading class until grade-level proficiency is achieved. This will be added to language arts and





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the 45-minute block of intensive reading strategies for struggling students will continue.

Start date: August 2007

### 2. Refine the comprehensive math model.

Intensive math instruction will be given to students scoring below grade level. Math experts will train and support teachers.

In grades six through eight, students below grade level in math will take an intensive math course that supports the regular math curriculum.

In grades K-8, all teachers will use a common assessment model to guide instruction and assess student performance.

All math teachers will be trained to teach more effectively and align the required personalized educational plans for students in grades three, five and eight.

A teacher panel will review quarterly assessments to ensure alignment with the standard course of study, EOG and EOC.

Start date: August 2007

### 3. Integrate writing across the curriculum.

We will develop a writing plan, set uniform expectations across the district and provide training in best ways to teach according to the plan.

Start date: August 2007

### 4. Accelerate the high school reform initiatives.

The high school program in CMS has changed significantly in recent years. Olympic and Garinger have divided their campuses into small academies to incorporate the small-learning-communities theory. In addition, the Performance Learning Center, which is partially funded by a Community in Schools grant, offers students a chance to participate in self-paced, computer-based instruction.

Garinger, Waddell, West Mecklenburg and West Charlotte high schools will be reconstituted in 2007. These schools will provide bonuses and salary increases to attract high performing teachers and staff members. Teachers and administrators will be trained in instruction and leadership. These schools will be redesigned to offer students a variety of choices, including early college opportunities, foreign language studies and career-focused programs in digital arts, health science and culinary arts.



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Some other CMS high schools will follow the Garinger/Olympic model by dividing into smaller learning communities as part of a gubernatorial initiative to redesign high schools with low student achievement. This will increase students' opportunities to make real-world applications and connections. CMS will partner with universities, businesses and community organizations to enrich these small learning communities and assist the reform initiative. CMS will closely monitor the efficacy of these small learning communities.

Start date: Ongoing

5. Begin reform initiatives at underperforming middle schools.

The initiative will use methods proven to improve instruction. The methods will include quarterly financial incentives for teachers. Reform will also include behavioral interventions, alternatives to suspension and teacher training.

Start date: August 2007

6. Create Eight-PLUS programs.

We will create a stand-alone Eight-PLUS school for students who will attend the four Challenge high schools. Other CMS high schools will create a similar on-campus Eight-PLUS program. The Eight-PLUS program will provide intensive remedial instruction to underachieving students, and it will be a mandatory alternative for students who do not pass eighth grade.

Start date: August 2007

7. Expand access to more rigorous courses.

Next year, CMS will partner with Central Piedmont Community College (CPC) to start a Middle College on a CPC campus. It will serve a maximum of 100 high school juniors and seniors. It will provide a non-traditional high school experience with exposure to college courses and increased opportunities for acceleration.

As noted above, staffs will be reconstituted at the four schools included in the High School Challenge funded by the county commission. In addition, as noted above, other high schools will also be redesigned as part of a gubernatorial initiative to redesign high schools with low student achievement.

To better prepare all students, especially those typically underserved, for college or the workforce, CMS will partner with colleges and universities in order to develop and create early college initiatives. Students will be able to earn associate degrees or two years of transferable college credit while still in high school.



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College-prep programs such as Springboard will be added. A district-level executive director for advanced studies (a new position) will design the early college initiative and launch college-prep studies.

CMS will also continue open access to such rigorous courses as Advanced Placement and International Baccalaureate studies and continue to encourage widespread enrollment.

Start date: Ongoing

### 8. Expand the K-8 comprehensive science model.

CMS will team with universities, business and community leaders to make students globally competitive for jobs requiring math and science skills. A district-level executive director of math and science instruction (a new position) will work to increase math and science performance. The director will also create and monitor district-wide math and science initiatives and advise principals and teachers. The director will also develop international achievement standards, develop training in best practices for teachers and develop educational innovations. Students will participate in family math and science nights, math/science field investigations, and math/science fairs and competitions.

In partnership with community leaders in science, CMS teachers will receive curriculum-specific training during the school year. Community science partners will teach and provide lesson models for CMS teachers. Teacher participation in this training will be encouraged and rewarded, and the training will be given to all science teachers by 2008.

Beginning in January 2007, K-5 CMS students will receive 45 minutes of science instruction three times per week. CMS also will intensify the science curriculum in middle school with teacher training.

Start date: Ongoing

### 9. Expand foreign-language instruction.

CMS has successful foreign-language magnet programs for K-8 at various schools, and foreign-language instruction is available to all high school students. CMS has applied the research findings of neurologists and developmental psychologists which show the earlier a student is taught a second language, the easier it is to learn. To meet and increase the demand for second-language instruction, CMS will add foreign-language programs for all elementary and middle school students. CMS will expand foreign-language education beyond the classroom using innovative partnerships between schools and the community.

A phase-in process will start in August 2008 with the addition of a foreign-language component in elementary schools.



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All middle school students will study a foreign language. At the end of fifth grade, students will be tested and the results used to place them in appropriate advanced foreign language elective courses in grades six through eight.

CMS will expand successful student exchange programs at the foreign-language schools to include students district-wide.

Start date: August 2008

### 10. Expand students' use of technology.

Students in kindergarten through grade 12 will be required each year to create a project, using some form of technology, that studies a country other than the United States. Each school will develop a technology plan and teachers will receive training in technology.

Start date: August 2008

### 11. Expand opportunities for talented and gifted students.

The elementary school catalyst model, which provides higher learning activities to talented and gifted students and other students, will be expanded. At the secondary level, a senior-high pilot program at Horizons will create new internships and mentorships, linking student talents and interests with opportunities in the greater Mecklenburg community. The pilot program's results will be used to develop a district-wide plan.

Start date: August 2008

### 12. Address the needs of English Language Learners.

CMS has a diverse student population. Schools with high numbers of English as a Second Language (ESL) students will have a newcomer program to provide orientation and transition services. These programs will provide a curriculum tailored to each student's level of English fluency, emphasizing academic English. Appropriate instructional materials will be available, and principal and teacher training will be provided. A National College Fair for Hispanic Students will be held to provide information for parents and students and to encourage greater participation among Latino students in higher education. A position for immigrant-student education and services will be created.

Additionally, parent/student advocates will be hired and placed in schools with high Limited English Proficiency (LEP) enrollment to strengthen the parent and school relationship and address academic needs of students.

Start date: August 2007



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13. Address the needs of children in poverty.

Principals, assistant principals and teachers will receive Ruby Payne training to meet the needs of children in poverty. A specific instructional model for these students will be developed, including community and business partnerships. Learning field trips for students who could not otherwise afford cultural experiences will provide exposure to the visual and performing arts.

Start date: August 2007

14. Expand inclusive practices for Exceptional Children with disabilities.

Extensive teacher training, enhanced allotments, communication tools and on-site support will continue at inclusive-practices schools. All secondary schools, 51 elementary schools, and all kindergarten and Bright Beginnings classes now use inclusive practices. The remainder of the elementary schools will be trained during the 2007-2008 school year, and CMS will continue to train teachers in inclusive practices.

Start date: Ongoing

15. Establish an Achievement Zone, comprised of lower performing schools.

As part of a comprehensive reorganization of the district, an Achievement Zone will be created for lower-performing schools. These will include schools in corrective action under No Child Left Behind legislation, low-performing schools as designated by the state, and underachieving high schools designated by North Carolina Superior Court Judge Howard Manning in the *Leandro* litigation. More information about this initiative is in the section entitled "Freedom and Flexibility with Accountability."

Start date: Ongoing

16. Test an expanded school day at one elementary school.

CMS will pilot an expanded school day at one elementary school to see if student achievement increases. If results are good, we will expand the program to other schools.

Start date: August 2007

17. Expand after-school programs at middle schools.

The after-school programs at middle schools will have three components: tutoring, homework assistance and physical activity. The programs may eventually include all students. Special areas such as art, music and journalism will be added where feasible.

Start date: Ongoing





REACH FURTHER.

18. Promote wellness and physical activity for all students preK-12.

School meals will offer more healthy foods. CMS will no longer sell carbonated drinks to students during the school day.

Start date: August 2007

19. Promote increased participation in study abroad programs.

CMS will promote increased participation in study abroad programs by raising student, parent and community awareness of the benefits of these programs.

Start date: August 2007

## D. Monitoring

The measures below will be used to monitor progress on the goals for high academic achievement.

Objective 1 will be measured by the North Carolina ABCs program.

Objectives 2, 3, 4 and 5 will be measured by the North Carolina End-of-Grade assessments.

Objective 6 will be measured by the North Carolina End-of-Course assessments.

Objective 7 will be measured by the North Carolina End-of-Grade and End-of-Course assessments.

Objective 8 will be measured by the cohort graduation rate.

Objective 9 will be measured by the cohort drop-out rate.

Objective 10 will be measured by Advanced Placement exams.

Objective 11 will be measured by the SAT.

Objective 12 will be measured by nationally normed exams.

Objective 13 will be measured by NAEP, otherwise known as the Nation's Report Card.



GLOBAL COMPETITIVENESS STARTS HERE.



REACH FURTHER.

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## II. EFFECTIVE EDUCATORS

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### A. Overview

For the 2006-07 school year, Charlotte-Mecklenburg Schools employed approximately 8,650 teachers and 480 principals and assistant principals. Given projections for student growth and historical patterns of teacher turnover, we expect to hire more than 1,600 teachers and school administrators each year for the foreseeable future.

During 2005-06 alone, a total of 45 principals were hired or promoted from assistant principal positions to fill vacancies created by separations, transfers, retirements, five newly constructed schools and seven new small high schools.

Is the supply of quality teachers and principals adequate? Erskine Bowles, president of the University of North Carolina system, has said that 11,000 teachers are needed each year in North Carolina but the state produces only 3,000-3,500 teachers annually. About a third – 1,000 – of those move out of state. Thus, we and other districts must recruit from outside North Carolina or train new teachers through the lateral-entry teacher program. Except in the Midwest, where student populations are decreasing, other districts in the Council of the Great City Schools report similar teacher shortages.

The challenge for us is clear. Effective teachers in every classroom and effective principals in every school are critical to our academic success. So we have employed many strategies to acquire and retain the best teachers and school administrators, including recruiting plans, bonuses, tuition reimbursement, salary supplements, pay-for-performance, and internal and external professional-development opportunities. Some have worked better than others. As a result, not all schools in the district and not all student populations in the district have met achievement targets.

Recognizing that leadership and instruction quality vary in our schools, the Board of Education highlighted these issues in its Reform Documents. The Board of Education said in its Core Beliefs and Commitments that it wants to place a principal with strong leadership and management skills as the key instructional leader in every school. It also wants to ensure that an effective teacher instructs every class. And the Board of Education wants to build the capacity of our personnel through meaningful professional development and provide every child with adequate resources, regardless of need.

The Board of Education also adopted a policy in October 2006 entitled "Effective Teachers and School Administrators." This outlines in detail how the Board of Education expects its goals to be realized. The policy also provides the following overview:



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REACH FURTHER.

It will require a coordinated, comprehensive strategy, including:

- Recruiting and retaining effective teachers, principals and assistant principals with strong leadership and management skills;
- Providing opportunities for appropriate professional development;
- Providing positive working conditions;
- Aligning job assignments with student and district needs;
- Evaluating the performance of teachers and principals; and,
- Holding principals and teachers accountable for results as measured by state and federal tests.

The policy says every school must have a strong, effective principal and every classroom a strong and effective teacher. The Board of Education directed the superintendent to develop regulations and strategies designed to measure and ensure that all schools have a reasonable balance between new and experienced teachers, a significant number of teachers with advanced degrees and certifications, and a significant number of teachers who have increased student achievement. The Board of Education has also directed the superintendent to use both financial and non-financial staff incentives to achieve an equitable distribution of effective teachers and school administrators.

Data from the 2005-06 school year shows that there is still much work to do. This data compares the percentage of FOCUS (Finding Opportunity; Creating Unparalleled Success – a designation for schools with high levels of poverty in the student population) schools with equal teacher experience and credentials with the CMS two-year average in Schools of Excellence and Distinction:

All FOCUS Schools

By Level	Clear License	Advanced Degree	New To Teaching	National Board	4+ Years Teaching Experience	Average Experience
Elem	88%	59%	66%	31%	34%	25%
Middle	27%	18%	36%	0%	27%	9%
High	50%	0%	0%	0%	0%	0%
Total	69%	43%	51%	20%	29%	18%



GLOBAL COMPETITIVENESS STARTS HERE.



## REACH FURTHER.

To attract teachers in our critical-needs areas, we compete with other school districts as well as private industry, which values many of the skills good teachers possess. Moreover, general compensation for employees in both certified and non-certified jobs has not kept pace with the market. In addition to the inequity created by cumulative years of low annual increases (last year being the exception), current compensation rules often limit our ability to attract qualified candidates.

### B. Objectives by 2010

1. CMS will increase the percentage of its schools with effective teaching staff. That effectiveness will be measured by subjective and objective evaluations, and the percentage will be set after a district-wide accountability system required by CMS Board of Education Policy AE has been adopted.
2. At least 99.4 percent of the teaching positions will be filled by the first day of school and remain so throughout the school year. This will be measured by periodic checks of staffing during the school year. (This year, 99.0 percent of teaching jobs were filled on the first day; we have no first-day data for other certified and non-certified staff. On Sept, 29, 2006, 98.8 percent of licensed-staff positions were filled; non-licensed staff was 95.9 percent). CMS will also have all other certified positions and non-certified positions filled at high percentages.
3. At least 95 percent of the schools will have all teaching positions filled by the first day of school and keep them filled throughout the school year. This will be measured by periodic checks throughout the school year. (68 percent [109 schools] as of the start of the 2006-07 school year.)
4. Targeted schools (currently identified as FOCUS [Finding Opportunities; Creating Unparalleled Success] schools; these are the schools with high levels of student poverty that were formerly designated EquityPlus Schools) schools) within CMS will be staffed with teachers and administrators who have the same experience and degrees as the two-year average for teachers in the Schools of Excellence and Distinction as defined by ABC rankings.

### C. Strategies

1. Enhance recruitment strategies.

We will continue our successful recruiting strategies, including two annual teacher job fairs and using good teachers and principals to help us recruit. We will also practice the following strategies:

- Through a targeted marketing campaign, aggressively recruit principals in North Carolina and other states who have demonstrated high student performance and high growth.

Start date: December 2006



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## REACH FURTHER.

- Involve the school leadership – a teacher, a non-teaching member of the school staff, a parent and (at the high school level) a student – when hiring a new principal. The leadership team will develop a principal profile to help identify strong candidates. Where there is a new hire (rather than a transfer), the leadership team will participate in the initial interview process, along with district administrators. A short list of top candidates will be given to the superintendent, who will choose one and make a recommendation to the Board of Education.

Start date: December 2006

- Increase bonus program for the human resources division to reward its efforts for opening the school year with no vacancies and/or meet recruiting targets.

Start date: August 2007

- Expand recruitment of North Carolina Teaching Fellows by using mentor relationships during college with Teaching Fellow alumni and a designated Teaching Fellow signing bonus.

Start date: August 2007

- Expand CMS participation in the Teach For America program.

Start date: August 2007

- Develop a CMS Teacher Ambassador Program to aggressively recruit and train highly talented college students who are not education majors to teach for two or three years.

Start date: August 2008

- More aggressively recruit teachers in critical-needs areas, such as math, science and special education, through a targeted marketing campaign, additional compensation and partnering with colleges and the private sector.

Start date: January 2007

## 2. Reward staff with compensation initiatives.

We will continue our successful compensation initiatives, such as the local salary supplement for all teachers and performance-based bonuses for individuals and schools. We will also:

- Conduct a comprehensive compensation study and change our salary scale as indicated. We are now looking for a firm to evaluate our salaries and pay grades, to find any inequities inside or outside the



GLOBAL COMPETITIVENESS STARTS HERE.



## REACH FURTHER.

district, determine market rates for non-licensed positions such as bus drivers and architects, and review our job descriptions.

Start date for study: February 2007

- Launch additional salary and bonus initiatives for targeted schools. For example, the High School Challenge merit salary supplement, which gives a 15 percent increase to instructional and non-instructional employees, will begin in 2007-08.

Start date: Ongoing

### 3. Refine professional development for improved instruction.

The Organizational Training and Development Office currently provides diverse course offerings and varied Web-based resources for teachers and administrators. Each participant is required to take an online evaluation to continue enhancing the quality of professional development offered. In addition to current initiatives, the following strategies will be used to further refine professional development offerings:

- Align professional development for school administrators and teachers with the Board of Education's Reform Documents, curriculum, performance standards and needs revealed by analysis of student achievement and teacher appraisal data.

Start date: August 2007

- Establish an exemplary Teachers Institute supported by local colleges and universities. The institute will participate in the Yale National Initiative and provide high quality professional development. Teachers will participate in intensive two-week summer sessions at Yale University, where they will be trained in an environment that encourages self-reflection about content and pedagogy.
- Provide all first- and second-year principals with internal and external mentors. In addition to providing internal mentors, CMS will partner with major corporations to develop an executive principal-coaching program to address best practices and leadership development.

Start date: August 2007

- Expand leadership training to develop future principals from existing staff. Participants will develop leadership skills and acquire knowledge related to the district's core competencies and specific administrative functional areas. Career planning will be expanded for employees and support will be provided to improve succession planning and training opportunities.

Start date: January 2007



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## REACH FURTHER.

- Conduct an audit of our professional development programs with the National Staff Development Council to analyze and improve what we have.

Start date: January 2007

#### 4. Ensure equitable staffing for every school.

In addition to continuing current initiatives that have had some success in recruiting and retaining school administrators and teachers at targeted schools (e.g., signing and performance based bonuses, tuition reimbursement programs, special job fairs and closing certain non-targeted schools to transfers), the following strategies will be implemented:

- Reconstitution of identified schools (See High School Reform Initiatives under the High Academic Achievement Section).

Start date: Ongoing

- Targeting teams of teachers for potential reassignments. In the first year, teams of teachers will be self-identified, including a structured volunteer process to create National Board teacher teams. As money permits, we will send teacher teams from a non-FOCUS school to visit a FOCUS school during the FOCUS transfer period.

Start date: February 2007

- Reassigning teachers and licensed support staff as necessary when other methods have not proven successful.

Start date: August 2007

#### 5. Improve teacher working conditions.

In addition to working to have effective leadership in each school, and providing individual and team-planning time as well as adequate facilities, materials and supplies, we will also:

- Address issues raised in results from the State Working Conditions Survey and in the CMS-administered school survey. Plans to address these concerns will be included in each school's improvement plan and will be reviewed by school leadership teams.

Start date: August 2007





REACH FURTHER.

6. Use evaluation to improve performance.

We will continue our observation of principals and teachers using evaluation instruments, and discussing the results with them. We will also:

- Add more performance criteria to our evaluation measures, such as student performance and employee attendance.

Start date: August 2007

- Provide training for all staff, and explain the superintendent's expectations and the evaluation process.

Start date: This strategy will begin in the four Challenge High Schools in November 2006

- Shift to an electronic system to manage evaluation documents.

Start date: February 2007

## D. Monitoring

The measures outlined below will be used to monitor the goals for Effective Educators.

The measurement for Objective 1 will be defined when evaluation and accountability standards are developed.

Objective 2 will be measured using the vacancy rates for classroom teachers, other certified employees and non-certified employees when school opens and during the year.

Objective 3 will be measured by the percentage of schools with all teaching positions filled at opening day of school and other selected times.

Objective 4 will be measured by the percentage of target schools staffed with teachers and administrators reflecting the same characteristics as the two-year average for the CMS Schools of Excellence, Distinction and High Growth, as measured by the ABC program. The characteristics include clear licensure, advanced degrees, new to teaching, National Board licensure, four or more years of experience and the average years of employment.



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REACH FURTHER.

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## III. ADEQUATE RESOURCES AND FACILITIES

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### A. Overview

Over the last 10 years, CMS has put in place a series of coordinated strategies to attempt to ensure that resources such as staff, instructional materials and supplies, technology, co-curricular activities and facilities were allocated according to student needs. CMS recognizes that some students need additional resources and attention to succeed, particularly those at risk of academic failure. We have used differentiated staffing, which gives additional staffing positions to schools with high concentrations of students from low socioeconomic backgrounds, as well as lowered class sizes, provided additional instructional supplies and materials, provided expanded and renovated facilities, mandated co-curricular activities and established a significant pre-school program. Certain schools were identified as *EquityPlus* schools (now FOCUS [Finding Opportunity; Creating Unparalleled Success, used to designate schools with high concentrations of low-income students] schools) that needed additional resources. In 2001, the Board of Education adopted a series of policies, including Policy ADA: Equitable Educational Opportunities, to ensure that CMS provided equitable educational opportunities to all students. The Board of Education also established an Equity Committee to monitor the progress of our equity initiatives. A brief synopsis of the components for each major resource allocation through the 2005-06 school year follows.

#### *Classroom Teachers*

In general, staffing for classroom teachers is based on student enrollment at each school. However, since the late 1990s, CMS has enhanced the standard enrollment-based staffing model by providing additional teachers for high-poverty schools. To qualify, schools must meet, in pertinent part, a stated percentage threshold of students eligible for free or reduced-price lunch (FRL), the standard used to determine poverty. If a school meets or exceeds the specified FRL percentage threshold, it is given more classroom teachers than the standard number. This has created a two-tiered system where some schools get extra teachers because of FRL numbers, and others do not. Unfortunately, this standard excludes some schools just below the threshold or very large schools with large numbers of at-risk students. To address this, CMS has provided differentiated staffing and used staffing at successful schools as a model for less successful schools, applying measures such as years of experience, degrees and certifications.

#### *Instructional Materials and Supplies, Technology, Co-Curricular Activities*

In the late 1990s and early 2000s, CMS developed baseline standards for various instructional materials and supplies, technology and co-curricular activities, and we began work to bring all schools up to standard. For



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## REACH FURTHER.

some schools, even higher standards were set to provide additional resources deemed necessary to address the needs of their students.

In January 2005, a report using 2003-04 data and titled *Achieving the CMS Vision: Equity and Student Success* showed CMS was making progress in all schools reaching the higher standards. Our FOCUS schools were at 100 percent compliance for instructional materials and supplies. More than half – 53 percent – of all other schools met the baseline. In terms of technology, all schools met the ratio of eight students to one computer, and 85 percent of the schools met the ratio of five students to one computer. For co-curricular activities, 55 percent of our schools met the baseline standards.

### *Facilities*

*Achieving the CMS Vision: Equity and Student Success*, various studies, committee reports, community site visits, evaluations and professional reports showed that existing CMS facilities must be improved to provide quality instruction consistently across the district. A Long-Range Schools Facilities Master Plan was developed to provide a comprehensive analysis of trends, issues and factors that can be used as a framework to develop future school sites and renovate or replace existing school facilities. In addition, baseline facility standards were adopted.

As of August 2006, 46 percent of CMS schools (70 of 153) met the baseline facility standards. The 2005 Master Plan, which is being revised, called for construction of 11 new elementary schools, two new middle schools, and two new high schools by 2010. It also calls for the renovation of seven schools to bring them to baseline standards. These projects were included in the 2005 bond referendum, which was rejected by the voters. Subsequent to the defeat, the School Building Solutions Committee (SBSC), chaired by former Gov. Jim Martin, recommended that Certificates of Participation (COPs) be issued to address immediate needs, with a bond referendum in November 2007 not to exceed \$400 million.

The COPs approved by the county commission after the SBSC's recommendation will allow the construction of two elementary schools and the renovation of four schools. These projects, and 13 others currently funded by earlier bonds and COPs, will increase the percentage of schools at baseline facility standards to 57 percent (89 of 157). The county commission also approved the evaluation of a public/private partnership with developers to lease school facilities; this partnership would add two new schools, replace one school, and renovate three others. If successful, the percentage of schools at baseline facility standards will increase to 60 percent (95 of 159).

A 2007 request for capital funding will likely include at least two new high schools, two new middle schools, seven new elementary schools and renovations at four existing schools to bring them to facility baseline standards. Completion of these projects by August 2010 will increase the percentage of schools at baseline facility standards to 65 percent (110 of 170).



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## REACH FURTHER.

One of the objectives of the Master Plan is to reduce the inventory of temporary classrooms (modular classrooms and mobiles) by 40 percent. Based on existing and anticipated capital funding, CMS will add 18,000 classrooms by 2010. With an anticipated growth of 22,000 students through the beginning of the 2010 school year, it is likely that the inventory of temporary classrooms will increase by 160 without the use of other measures such as alternate financing, public-private partnerships or alternate scheduling.

With over 18 million square feet, CMS has the largest facility-management operation in Mecklenburg County. The annual resources available for this operation are insufficient to run a comprehensive preventive maintenance program and reduce the backlog of major corrective maintenance and repair of various building systems. Based upon current industry benchmarks, CMS should spend at least \$2.00 per square foot on annual maintenance and repair. That is significantly more than the current allocation of \$1.15.

### *Renewed Commitment to Adequate Resources*

In its Core Beliefs and Commitments and its Theory of Action, the Board of Education has recommitted the school system to securing and allocating adequate resources according to the needs of each child.

## **B. Objectives by 2010**

### *Human Resources — Staffing Allocations of Classroom Teachers*

This is described in the Effective Educators section.

### *Instructional Materials and Supplies, Technology, Co-Curricular Activities*

1. All schools equipped with CMS standard instructional materials and supplies (53 percent of all schools; 100 percent of all FOCUS schools [those with high concentrations of low-income students] as of January 2005).
2. All schools at CMS standards for technology (85 percent at a student:computer ratio of 5:1 as of January 2005).
3. All schools with the CMS standard number of co-curricular activities (55 percent as of January 2005).

### *Facilities*

1. Sixty-five percent of schools will meet baseline standards (46 percent as of August 2006).
2. Fifteen percent reduction in the number of temporary classrooms (there are 1,059 units as of August 2006).



**GLOBAL COMPETITIVENESS STARTS HERE.**



REACH FURTHER.

## C. Strategies

### *Human Resources — Staffing Allocations of Classroom Teachers*

- I. Implement a weighted student-staffing model.

A weighted student-staffing model will address in 2006-2007 the two-tiered system created by the current staffing formula. It assigns a weight of 1.3 to each student identified as qualifying for free or reduced-price lunch. All other students are weighted at 1.0 at this time. The staffing allocation across the district is based on this weighted formula. We will continue using this formula through the 2007-08 school year and may refine it if needed.

Start date: Completed.

### *Instructional Materials and Supplies, Technology and Co-curricular Activities*

- I. Continue the FOCUS initiatives for instructional materials and supplies, co-curricular activities and technology through the 2007-08 school year.

Start date: Ongoing

2. Evaluate the FOCUS initiatives for instructional materials and supplies, co-curricular activities and technology and implement recommended changes for the 2008-09 school year.

Start date: August 2008

### *Facilities*

- I. Conduct a comprehensive evaluation of facilities planning and construction.
  - Appoint a superintendent's standards review committee to review educational specifications and construction specifications. The committee will work to reduce construction costs by 10 percent, as recommended by the School Building Solutions Committee.
  - Develop a Ten-Year Facility Plan for 2007 upon which a 2007 facilities funding request will be based, and establish a process to get community input.
  - Develop a 2007 facilities-needs list not to exceed \$400 million. It should have 80 percent of projects in new construction and 20 percent in renovation and other initiatives.



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REACH FURTHER.

- Review the program management function and the contract for those services.
- Investigate the feasibility of public/private partnerships for projects.
- Through the Planning Liaison Committee, conduct a review of municipal zoning regulations and their effect on school projects and construction costs.
- Reduce the number of mobile classrooms by 15 percent by building additional seats or alternate scheduling.

Start date: Ongoing

## D. Monitoring

The objectives for Adequate Resources and Facilities will be monitored in accordance with Board Policy ADA.



GLOBAL COMPETITIVENESS STARTS HERE.



REACH FURTHER.

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## IV. SAFE AND ORDERLY SCHOOLS

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### A. Overview

The Board of Education is committed to safe and orderly environments conducive to learning in all schools, and CMS has a vast array of programs to meet that goal. These programs are generally successful. Nonetheless, some individuals threaten our ability to educate all students well and to make events on CMS properties safe and enjoyable. In the 2005-06 CMS Student Survey, only 68.7 percent of our students said they felt safe at school. We must do more – and enlist widespread community support – to make our schools safer.

### B. Objectives by 2010

1. Eighty percent of students will indicate they feel safe at school.
2. Seventy percent of parents will indicate they believe schools are safe.
3. Seventy percent of community members will indicate they believe that schools are safe.
4. All schools will score at or above 90 percent on an annual safe school audit.
5. The number of state-reportable incidents of inappropriate behavior per 1,000 students will decrease by 10 percent (6.7 per 1000 as of 2005-06).

### C. Strategies

1. Reorganize and expand alternative school programs.

CMS will develop more placement options that will address student offenses through specific programs to meet student needs using a four-tiered system. This will include student/parent selected placement at certain schools; district selected placement at alternative programs for certain incidents; district selected placement at other alternative programs for more egregious offenses; and, if necessary, exclusion and expulsion. It will also require immediate placement of students charged with or convicted of certain crimes to the extent permitted by applicable law. We will continue our Criminal Watch program to monitor students charged or convicted of minor crimes. We will also recommend the expulsion of students where appropriate.

Start date: January 2007



GLOBAL COMPETITIVENESS STARTS HERE.



## REACH FURTHER.

2. Increase and expand the roles of campus security associates and school law enforcement officers at athletic and other extra-curricular events.

In order to maintain safety at athletic and other extracurricular events, the role of campus security associates and school law enforcement officers will be expanded. Their presence will be increased at events and they will increase their involvement in managing inappropriate behaviors at those events.

Start date: Completed

3. Strengthen relationships with community partners.

We will strengthen relationships with community partners who are addressing youth violence and gang activity. CMS will convene meetings with various groups to discuss strategies and to put those strategies into actions. In particular, CMS will work with the Charlotte-Mecklenburg Police Department Gang of One initiative to reduce gang activity in the community.

Start date: Ongoing

4. Discuss expected youth behaviors.

CMS will use its media channels (press releases, CMS-TV3, the Web site) to inform parents, students and the community of appropriate youth behaviors and to raise awareness of the impact inappropriate youth behaviors have on themselves and others.

Start date: Ongoing

5. Enhance relationships with law enforcement.

CMS will increase its level of communication and collaboration with local law enforcement agencies. Among other initiatives, CMS will enter into a Memorandum of Understanding with local law enforcement agencies regarding reporting and investigating crimes on CMS property.

Start date: Ongoing

6. Evaluate Positive Behavior Intervention and Support (PBIS).

PBIS, a process for creating safer and more effective schools, will be evaluated. PBIS focuses on positive behavior for all students, all staff, and in all settings to prevent problem behavior. School staff sets rules that are consistently taught and reinforced by all school personnel. Data is collected on disciplinary infractions using a Web-based system. PBIS is based on a long history of research-based behavioral practices and is used in 65 CMS schools.

Start date: Ongoing





REACH FURTHER.

7. Train teachers on best ways to handle bullying among students.

CMS will collaborate with a community partner to provide training to teachers on strategies for handling bullying among students.

Start date: August 2008

8. Expand the truancy court initiative.

CMS will expand its collaboration with local judges to address truancy problems, including having judges address parents and students at school.

Start date: Ongoing

## D. Monitoring

Objectives 1-3 will be measured by polls and surveys. Objective 4 will be measured by annual safe-school audits conducted by CMS school safety personnel. Objective 5 will be measured by the annual school crime report submitted to the state.



GLOBAL COMPETITIVENESS STARTS HERE.



REACH FURTHER.

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## V. FREEDOM AND FLEXIBILITY WITH ACCOUNTABILITY

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### A. Overview

Over the last several years, CMS has concentrated on building a managed-instruction system largely focused on the elementary grades. Essential elements of this system include:

- A comprehensive, research-based district curriculum that flows seamlessly from one grade level to the next and allows for student mobility between schools
- Professional development that is centered on the curriculum being taught
- An individualized student information-management system that allows teachers to determine each child's academic strengths and weaknesses
- Detailed assessments to track achievement and drive instruction
- Carefully calibrated and appropriate interventions—by child, by teacher, by subject and by school—to enable principals to keep performance on course.

CMS currently uses many programs and strategies to augment the managed-instruction system. For example, through CMS's magnet program, some schools use specialized teaching strategies such as dual-language immersion and Montessori. Nonetheless, schools must generally adhere to the main components of the managed-instruction system and are not given much flexibility, either to raise results or if they show good results.

The schools are currently supervised by grade level-specific regional superintendents: three for elementary schools; two for middle schools; and one for high school. Each grade level also has an assistant superintendent for curriculum and instruction.

The Board of Education's Core Beliefs and Commitments specify that "adults are accountable for building and maintaining high performing organizations that ensure all students will successfully acquire the knowledge, skills and values necessary for success." In its Theory of Action, the Board of Education says that CMS must be redesigned to manage for performance, moving beyond its current managed-instruction program to one that recognizes accomplishment and rewards it with additional freedom. The Theory of Action also provides:

The district's core business—teaching and learning—must be managed by the central office with some flexibility. This flexibility must balance accountability with empowerment according to the needs and performance of individual schools or particular classrooms. The structure of central office support itself must also be decentralized in order to be more responsive to the needs of principals, their schools and the public.



GLOBAL COMPETITIVENESS STARTS HERE.



## REACH FURTHER.

The Board of Education's reform policy, AE: School Accountability System, requires the development of a district-wide accountability system by the end of the 2006-07 year that will be effective for the 2007-08 school year.

### B. Objectives by 2010

1. Eighty-five percent of schools will receive the top rating(s) on the CMS Accountability System.
2. Sixty-eight percent of schools will make Adequate Yearly Progress under the federal No Child Left Behind standard (35.2 percent [50 schools] as of 2005-06).

### C. Strategies

1. Develop a district-wide school accountability system, in accordance with Policy AE.

Start date: Pilot March 2007; fully in place August 2007

2. Communicate accountability expectations to all employees.

Start date: August 2007

3. Reorganize and decentralize the district.

The goal of decentralization of CMS into a system of learning communities is to deliver education systems more efficiently and more effectively. We will shift the district philosophically, moving it so that resources and decision-making are closer to the classroom than to a centralized office, as is now the case. This makes organizational sense because the classroom is the focal point of education: It is where we deliver our services.

Putting resources and decision-making nearer the classroom matches purpose with process: The people closest to the delivery point have most of the responsibility for that delivery of services.

Given adequate resources and the authority to make decisions, schools can become more responsive to the needs of those they serve – students, parents and the community. These needs are changing quickly as our student body becomes more diverse – and that too is a reason to reduce slow-moving bureaucracy and put resources and responsibility closer to each school.

CMS will be reshaped into geographically grouped learning communities that reflect feeder patterns as students advance from pre-kindergarten to high school. Each learning community will be led by an area





## REACH FURTHER.

superintendent. This structure will reduce layers of bureaucracy between principals and the district superintendent. It will place more operational authority at the learning-community level. This aligns decision-making closely with classrooms, where those decisions have the greatest impact.

Effective in the 2007-08 year, schools will be supervised by area superintendents, each with authority over schools from pre-kindergarten to grade 12. Each area superintendent's list of schools will be developed during the 2006-07 school year.

Using this system, the central office will set broad goals and standards of consistency. It will maintain control of defining outcomes and other areas that require standardization, as well as services that benefit from economies of scale.

The learning communities will be responsible for areas that require flexibility and adjustment, such as staff development and some parts of instruction.

This reorganization will help realize the managed performance/empowerment system described in the Board of Education's Theory of Action. It will also clarify lines of accountability from teacher to principal to area superintendent.

The reorganization will include combining the leadership of school administration and education services into one position, the chief academic officer. (This has already been done.) Also, certain central-office academic positions will be redeployed to schools. The central-office administration will be fully reorganized as the 2007-08 budget is developed.

The support that each area superintendent receives will be developed during the 2006-07 school year, and further refined after more comprehensive study during the 2007-08 school year. Some support services will remain centralized; others will be aligned by area.

There will also be an area superintendent assigned to supervise schools that need more intensive support generally because of low academic performance (e.g., schools in corrective action under NCLB legislation, schools designated as low performing by the state, schools highlighted by Judge Manning in the *Leandro* litigation). This area will be called the Achievement Zone.

The area superintendent for the Achievement Zone will report directly to the superintendent. All other area superintendents will report directly to the chief academic officer.

Start date: Ongoing





REACH FURTHER.

4. Empower schools with more freedom and flexibility.

CMS will begin a process of expanding a managed curriculum to provide successful enrichment programs that meet and move beyond basic academic standards. Two strands of curriculum will be implemented. Students who marginally maintain grade-level progress and those falling below grade level will continue to be served through programs such as direct instruction and other proven curriculum and strategies. This strand will remain focused, supported and strong. Students who attain and exceed managed curriculum will receive expanded curriculum and programs designed to challenge and generate high achieving independence, thinking and leadership.

A two-strand approach to meeting student academic needs is often the brainchild of innovative, insightful administrators and curriculum leaders within an academic environment. Their knowledge of the students and community they serve can best define, develop and sustain successful enrichment programs that meet and move beyond basic academic standards. Within a single school, teachers can pair and share groups of students at grade level or across grade levels to put challenging programs in place and maintain daily instruction in basic academic programs. These innovative programs become self-directed and soon reflect the ownership of the entire community.

To begin expanding a managed curriculum, collaborative groups of school and district CMS leaders will explore, propose and practice a two-tier approach to learning. The exploration includes research-based programs and leader-inspired innovative academic designs. Field studies of selected programs will develop into models that serve for training and developing partnerships among schools with similar needs. This approach in elementary school, with similar designs in secondary schools, will reflect school and district commitment to learning and achieving for all students at all levels of need.

Start date: August 2007

## D. Monitoring

The measures to be monitored to track success in this area of the Plan include the following:

Objective 1 will be measured by the CMS School Accountability System.

Objective 2 will be measured by the No Child Left Behind standards.



GLOBAL COMPETITIVENESS STARTS HERE.



REACH FURTHER.

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## VI. WORLD-CLASS SERVICE

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### A. Overview

In order to effectively make this Plan a reality, CMS must transform its organizational culture to one that is truly service-oriented. This will require a new way of thinking throughout the entire organization, top to bottom. In short, CMS must be responsive to its “publics,” which include students, parents, community members and employees.

This will be a sweeping change and an important one. This transformation will only occur if, first, the mindset of every person working for CMS becomes truly service-oriented. As that transformation occurs, CMS must foster it with better resources, processes and/or better training.

### B. Objectives by 2010

1. Eighty percent of employees, parents and community members will agree CMS provides timely, accurate and responsive service on annual satisfaction surveys and polls.
2. CMS will deliver project charters developed for this Plan on time, on budget and at or above the expectation of the customer.

### C. Strategies

CMS will implement the following strategies to meet the objectives outlined above:

- I. Conduct a service audit.

Conduct an audit, including the use of “secret shoppers,” to determine baseline standards for responsiveness and service. The audit will measure current levels of effectiveness in several key areas, including how parents and other visitors are treated, how inquiries are handled (written correspondence, fax, email, interpersonal), the physical environment, external environment, signage and visual communications.

Solutions for improving satisfaction levels among various publics will be developed, and will address such issues as organizational culture, goals, employee incentives, service processes, communications and service measures.

Start date: October 2007



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## REACH FURTHER.

2. Conduct a call center study.

CMS will conduct a comprehensive study to analyze how telephone inquiries are handled by several departments, including public information, student placement, transportation, child nutrition, community use of facilities and Bright Beginnings. The study will also analyze and propose ways to streamline processes used to handle inquiries and fulfill information requests.

Start date: Completed

3. Launch a comprehensive service improvement program.

We will develop a comprehensive approach to service improvement, including management modeling, incentive programs, organizational structures, service processes, employee recognition/reward systems, employee training, and internal/external communication plans that are all focused on better serving CMS publics.

Start date: August 2008

4. Develop service standards.

CMS will establish measurable service standards for each department, school and facility, develop a monitoring system and include annual results in all employees' performance appraisals.

Start date: January 2008

5. Provide service training and communication.

CMS will provide ongoing employee training and communication on customer service initiatives and on techniques to improve quality and process.

Start date: January 2008

6. Launch a call center.

The district will develop a call center to manage calls from parents and community members about various school and business operations.

Start date: January 2008

7. Strengthen employee communications.

We will ensure that CMS employees are informed about CMS news and information on a timely basis by developing a comprehensive internal communications program. It will use a variety of tools and meth



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## REACH FURTHER.

ods, including Connect-Ed, email, CMS Intranet, CMS-TV3, DirectLine electronic newsletter, meetings, special events and other communication channels.

We will also strengthen the Superintendent's Teacher and Principal Advisory groups, and add advisory groups for other internal constituencies – such as support staff – as needed. Quarterly brown-bag lunches with the superintendent and other executive staff members will provide an informal forum for employees to ask questions and offer feedback.

Start date: August 2007

### 8. Develop internal pride campaign.

We will develop a district-wide program to acknowledge and reward accomplishments and to encourage teaming on initiatives. It will highlight CMS employees who go above and beyond in serving students, CMS and our community. It will also showcase outstanding teachers and principals.

Start date: March 2007

### 9. Start an employee feedback program.

CMS will start an employee feedback system to monitor satisfaction levels and to identify key issues and concerns. We will develop print and online versions, analyze results and report annually to the superintendent and executive staff. We will poll employees annually to determine the success of communications and job satisfaction.

Start date: March 2007

### 10. Start a feedback program for external publics.

CMS will start a feedback system for parents and other key publics. Annual, statistically valid public opinion polls of key publics will gauge satisfaction with CMS services and responsiveness.

Distribute "How are we doing?" service feedback cards to all schools and departments, monitor results and report annually to the superintendent. An electronic version will be posted online in spring 2007.

Start date: January 2007



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## II. Assess business operations.

All key business operations will be evaluated to determine their effectiveness and efficiency, how they can be improved, and whether they should be outsourced. The business operations to be evaluated include transportation, child nutrition, inventory management, warehousing and distribution, graphic production, facility maintenance and operation, and human resources. Recognized best practices and benchmarks should be determined for each operation. Comparison of these practices and benchmarks to actual in-house performance should be used to develop improvement plans for each operation. A timetable for the evaluation of performance will be established, with one major business operation evaluated each year, beginning in 2007.

Start date: Ongoing

## D. Monitoring

Objective 1 will be measured by polls and surveys.

Objective 2 will be measured by a percentage of project charters completed on time and within budget and at or above the expectation of the customer.



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REACH FURTHER.

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## VII. STRONG PARENT AND COMMUNITY CONNECTIONS

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### A. Overview

Parents and the community are key partners in making the Board of Education’s vision a reality. The Board of Education has committed the school system to “partnering with parents and the community in maximizing student learning” and “embracing our community’s diversity and using it to enhance the educational environment.”

### B. Objectives by 2010

1. Seventy percent of CMS parents will agree CMS is doing a good job and is headed in the right direction.
2. Seventy percent of community members will agree CMS is doing a good job and is headed in the right direction.
3. Seventy percent of parents and community members will agree CMS schools are safe.
4. Seventy-five percent of parents will agree their child’s school does a good job of keeping them informed and responding to requests.
5. More than half of parents and community members will agree CMS is a good steward of taxpayer resources.
6. More than half of parents and community members will agree CMS is responsive to requests and keeps them informed.
7. The number of district-sponsored partnerships that focus on improving academic achievement and increasing school safety will increase by 25 percent.
8. The number of volunteer hours devoted to improving academic achievement and mentoring at-risk youth will increase by 25 percent.



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REACH FURTHER.

## C. Strategies

### 1. Develop parent and community agreements.

We will encourage community leaders, elected officials, faith leaders and parents to enter into formal agreements or compacts with CMS to make the Board of Education's Vision a reality.

Start date: January 2008

### 2. Develop quarterly reports.

We will produce and distribute quarterly reports regarding CMS issues, concerns, initiatives and achievements to elected officials, and parent, civic, faith, business and community leaders. We will post these reports on the CMS website and feature them on CMS-TV3.

Start date: January 2007

### 3. Expand public engagement.

We will seek input from a variety of publics on a regular basis and strengthen communications with employees, parents, elected officials, non-profit leaders, real-estate agents, cultural institution leaders, the faith community and others.

We will regularly schedule parent and community forums, summits, focus groups, advisory committees, opinion polls, focus groups and other techniques to garner public input into CMS decision-making processes and initiatives.

Start date: September 2006

### 4. Give annual State of CMS address.

To build employee, parent and community awareness regarding CMS, the superintendent will deliver an annual State of CMS address, which will include a status report on key operational areas outlined in the Board of Education's Theory of Action and this Plan.

CMS will partner with local businesses and organizations to defray costs of annual event and materials. The address will be carried on CMS-TV3 and available on line and in print.

Start date: October 2007



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## REACH FURTHER.

### 5. Develop ombudsman program.

We will increase two-way communication channels and strengthen CMS ties to community leaders, groups and organizations by establishing an ombudsman program. This will help bridge the gap between CMS central administration and parents/community members and resolve individual concerns and issues more quickly and efficiently.

Start date: August 2007

### 6. Host regular media briefings.

Weekly media briefings keep reporters and the public abreast of important CMS news and information.

Start date: July 2006

### 7. Provide communications training.

We will provide communications training on variety of topics, including media relations, school marketing and interpersonal communications.

Start date: April 2007

### 8. Strengthen school leadership teams.

We will increase consistent and strong actions by school leadership teams to focus on school improvement planning and student performance. We will provide training for administrators and parent leaders, and monitor performance.

Start date: August 2007

### 9. Launch Parent University.

We will promote increased parental involvement in the education process by providing ongoing training, information and support via district-wide Parent University courses. These will be developed in partnership with local businesses, organizations and educational institutions and offered at little or no charge at area schools, libraries, businesses, houses of worship, non-profit organizations and government offices. Possible topics are GED classes and computer competency, family literacy and mathematics.

Start date: August 2008



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## REACH FURTHER.

### 10. Launch CMS-TV3 program for parents.

To promote parent involvement and to support parents in their role as their children's first and best teachers, CMS-TV3 will launch a half-hour program focused on how parents can foster learning at home. Topics will include homework tips, child development and effective discipline techniques, as well as building effective parent leaders and school improvement teams.

Start date: March 2007

### 11. Strengthen community partnerships and volunteers.

We will strengthen, develop and focus community partnerships that promote student academic success, student mentoring and a safe environment. We will conduct an analysis to determine the effectiveness of current programs and make recommendations for improvement.

We will also restructure the office of strategic partnerships and the student, family and community services department to better organize and engage parents and volunteers from area businesses and the community, and strengthen parent liaisons to schools and provide greater coordination, training and support to parents and parent leaders. We will work with corporate and community partners to boost volunteerism in CMS schools.

Start date: August 2007

### 12. Expand partnerships with faith community.

We will hold summit meetings with faith leaders and expand partnerships with area houses of worship to provide additional support for CMS students, especially those considered at risk of failure in school.

Start date: March 2007

### 13. Hold community tours.

We will restructure and expand the annual Walk in My Shoes program to include more businesses and organizations. We will also encourage more school visits by external publics, and conduct regular school and facility tours for area businesses, real estate agents and community groups.

Start date: March 2007

### 14. Build parent and community involvement.

We will strengthen, develop and focus our volunteering efforts to promote student academic success and a safe environment. We will also promote involvement in parent-teacher organizations and associations. An audit will determine effectiveness of current programs and make improvements.



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Start date: October 2007

15. Redesign and restructure Web site.

We will redesign and restructure the CMS Web site to increase user-friendliness and to develop sections designed specifically for current CMS parents, prospective parents, students, employees, community partners and volunteers, news representatives, vendors and other key audiences.

Start date: August 2008

16. Publish school performance report cards.

We will publish annual school performance report cards that are easily understood and provide information parents need when gauging the effectiveness of their children's schools, or when considering choosing a CMS school.

We will also widely publicize and distribute school performance report cards using a variety of communication channels, including meetings, CMS-TV3, the CMS website, print materials, email, Connect-Ed and other tools.

Start date: October 2007

17. Improve communications with parents and publics.

We will improve communication between schools and parents, and between CMS and its publics, through various mediums including parent-teacher conferences, school activity events, direct written and oral communications, Connect-Ed messaging and Internet-based communications.

We will also develop new district-wide CMS parent packets and distribute these to new families, real estate agents, pediatricians' offices, child-care centers, pre-kindergarten sites, YMCAs, houses of worship and other community gathering places.

Start date: Ongoing

## D. Monitoring

Objectives 1-6 will be measured by polls and surveys.

Objectives 7 and 8 will be measured by annual audits.



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# APPENDICES

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## CMS MANAGEMENT SYSTEM

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### A. Overview

To reach the goals outlined in this Plan, CMS will continue to employ management processes and tools that use best practices from the private sector. The integration of these processes creates a focus on results. We will continue our use of data to set directions, achieve accountability, measure employee performance linked to achievement of district objectives and foster collaboration throughout CMS. Below is a list of the systems and programs we use.

- *CMS—Educating Students to Compete Locally, Nationally and Internationally* (this Plan)
- The CMS Balanced Scorecard
- The Project Management System
- The Appraisal/Performance Management System
- Budget Alignment Process
- School Improvement Planning
- The Continuous Improvement Process

These CMS processes are integrated so they will support achievement of CMS goals. While the Board of Education’s Vision, Mission, Core Beliefs and Commitments and Theory of Action and CMS Goals 2010 define why the district is requiring actions to be taken by internal departments and divisions, *CMS—Educating Students to Compete Locally, Nationally and Internationally* (the Plan) defines specific objectives, the desired outcome and the strategies needed to achieve the desired outcomes. The CMS Balanced Scorecard gives more specific objectives, measures and targets.

The Project Management Process linked to the CMS Balanced Scorecard defines how the objectives and desired outcomes are to be met. The School Improvement Planning Process takes the CMS Balanced Scorecard to the school level to describe how each school plans to meet the CMS Balanced Scorecard objectives. The Continuous Improvement Process defines how data, measures and process management can improve central-office services.

The Budget Alignment Process ensures that resources are aligned with the CMS Balanced Scorecard. The Appraisal/Performance Management System links the employee-appraisal process to the scorecard and the Project Management Process and ensures individual accountability.



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## B. Background

The CMS Management System is based on the framework established by the Baldrige National Quality Program. The Baldrige Model includes seven criteria shown to be key factors in the success of high-performing organizations. Although originally developed as a for-profit business model, the guiding principles and management practices also fit an educational model. In fact, in 1998 federal legislation was approved to allow education institutions to apply for the Malcolm Baldrige National Quality Award, and new Baldrige criteria specifically tailored to education were written in 1999.

The CMS Baldrige-based management system includes seven areas: leadership; strategic planning; focus on publics; information and analysis; employee focus; process management and organizational performance results. Each area works with the others for a fully integrated process focused on achieving established goals.

### I. Leadership

Setting direction is an important function of organizational leadership. A key driver for Charlotte-Mecklenburg Schools is the Board of Education's Vision, central to all activities. Other key drivers are the Board of Education's Mission, Core Beliefs and Commitment, and Theory of Action. The CMS Goals 2010 align with the Board of Education's Vision and form a framework for objectives, strategies and initiatives.

### 2. Strategic Planning

Strategic planning is used to develop the strategic objectives, measures and targets necessary to achieve the vision and goals. A critical part of strategic planning is developing the action plans and allocating resources to reach the objectives. Both long-term and short-term planning horizons are considered.

Realizing the importance of clearly defined strategies, CMS is concentrating on four specific change levers in this area:

- Educating Students to Compete Locally, Nationally and Internationally (this Plan)
- CMS Balanced Scorecard
- Budget Alignment Process
- School Improvement Process

#### a. *CMS Balanced Scorecard*

The CMS Balanced Scorecard refines the Plan, detailing more specific objectives, measures and targets. It will serve as both a road map and a tracking system to monitor progress on achievement of the goals for the



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district. The CMS Balanced Scorecard will also be used on an annual basis as an action planning tool (to set targets and define activities for the next year) and as a prioritization tool for the budget process.

### ***b. The Budget Alignment Process***

The Budget Alignment Process aligns funding to the district's top priorities (as defined by the CMS Balanced Scorecard), categorizes spending and provides a framework to meet the CMS Balanced Scorecard goals and objectives. During the budget development process, each fund owner (director, grant manager, etc.) evaluates needs for the coming fiscal year and determines how specific resource requests will move the district toward achieving the goals of the CMS Balanced Scorecard. Each proposed expenditure is detailed and aligned to a specific objective or combination of objectives in a standard template format for compilation by the budget staff. Once all budgeted expenditures have been aligned to specific objectives, summary reports are prepared to illustrate how the district resources will be used. The Budget Alignment Process helps the Board of Education and the public understand how district money is spent and establishes a framework for discussing priorities.

### ***c. School Improvement Planning Process***

Each year, the principal and staff at each school develop an improvement plan that defines what the school will do to meet the targets in the CMS Balanced Scorecard, particularly targets for student achievement. These plans are monitored by the chief academic officer and appropriate central office staff. Results are included in the principal-appraisal process.

## **3. Focus on Publics**

As part of this management system, CMS will use a number of surveys and opinion polls, including surveys and/or opinion polls of students, parents, employees and community members. These surveys and polls will be used to identify areas of improvements and to make necessary modifications to systems and processes to address those areas.

## **4. Information and Analysis**

A critical component of this management system is the collection and analysis of information. Indeed, information and analytical processes and tools link the entire management system together, as they allow for more effective organizational decision-making. Information and analysis by CMS executive and senior staff take place each quarter to identify progress on meeting the CMS Balanced Scorecard targets and to identify rapid-response actions necessary to help schools and students achieve.



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## 5. Employee Focus

Another key component of the management system is the focus on the human resources. Critical components of this area are:

- Identifying necessary skills, competencies and characteristics
- Recruiting, hiring and retaining employees
- Training and developing employees
- Motivating employees
- Rewarding performance
- Communicating internally

A number of strategies will be used in this area. For example, the Senior Management Training program will be used to educate all senior managers to the new CMS Balanced Scorecard, Project Management, team building and the use of measures and appraisal instruments to align expectations and monitor performance. As another example, the Senior Management Appraisal evaluates each senior manager against specific objectives aligned to the CMS Balanced Scorecard.

## 6. Process Management

Identification, design, documentation, day-to-day management and improvement of key processes are critical to effectively meeting performance requirements and expectations. Key management processes in this area deserve particular emphasis as they are utilized within CMS extensively:

- *The Plan-Do-Check-Act Process* for improving student achievement
- *The CMS Project Management Process*
- *The Continuous Improvement Process*

### ***a. Plan-Do-Check-Act Process***

CMS is working hard to make systemic change in teaching practices and is using timely data regarding student performance relative to the North Carolina Standard Course of Study to closely monitor progress. There is a cycle of Plan-Do-Check-Act around teaching and learning. It begins with the setting of learning standards (which are set by the North Carolina Department of Public Instruction in the North Carolina Standard Course



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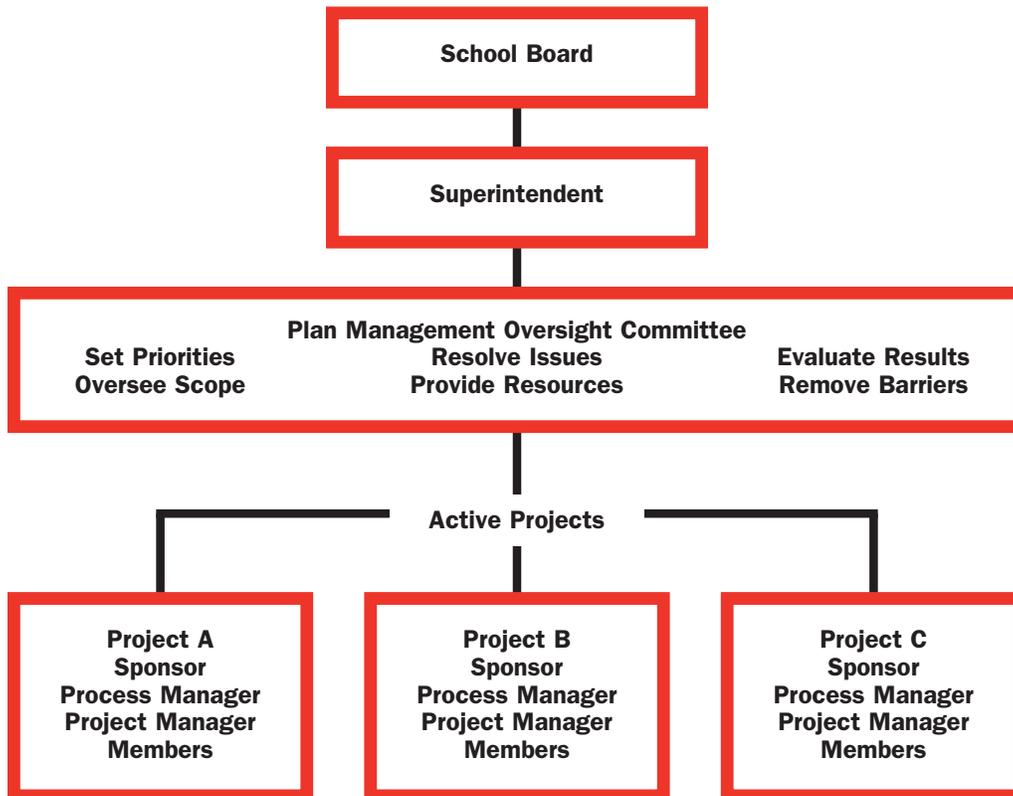
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of Study) and continues with the development of curriculum that aligns to the learning standards (Plan). Professional development is next in this cycle (Do), followed by delivery of the curriculum and then assessment of each student’s progress. Data analysis of the assessment results (Check) and instructional interventions as necessary for every student (Act) follow closely on the heels of the assessments to complete the Plan-Do-Check-Act cycle. CMS uses quarterly assessments aligned to the state standards to shorten the cycle time for the Check process to quarterly, rather than annually.

***b. CMS Project Management Process***

The CMS Project Management Process is used at executive levels to ensure successful completion of key projects.

It defines specific tasks that must be accomplished to achieve a stated goal, with tools to define expectations, track progress and provide a structure so that projects are delivered on time and within budget. Within CMS, this process is managed by a Plan Management Oversight Committee (PMOC). The following chart shows how PMOC works.



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Each week the PMOC meets to review of two to three of the district’s key projects. At any given point, the PMOC oversees at least a dozen top-priority projects. Each month, the PMOC receives a status report on each project. In addition, the PMOC reviews the status of the CMS Balanced Scorecard measures and targets driving the individual projects.

### *c. Continuous Improvement Process*

As noted in the Plan, Charlotte-Mecklenburg Schools will seek continued improvement in operations and support activities. This will continue a longstanding organizational commitment to improvement. In the past few years, CMS participated in an Efficiency and Effectiveness Review. Local business practitioners brought together by the Charlotte Chamber worked with CMS staff to review key central office business and support functions. This review process assessed the benefits of improvement initiatives at CMS and identified additional ways to improve.

## **7. Organizational Performance Results**

The core business of CMS is academic achievement. As a result, the primary results that CMS will track relate to that business. CMS will track and report student achievement results through various measures, including the North Carolina ABCs, the School Accountability System, No Child Left Behind Adequate Yearly Progress, and the High Academic Achievement objectives outlined in CMS Goals 2010. In addition, CMS will also track and report other organizational performance results.



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## CMS BOARD *of* EDUCATION VISION, MISSION *and* CORE BELIEFS AND COMMITMENTS

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### **Vision:**

CMS provides all students the best education available anywhere, preparing every child to lead a rich and productive life.

### **Mission:**

The mission of the Charlotte-Mecklenburg Schools is to maximize academic achievement by every student in every school.

### **Core Beliefs and Commitments:**

We believe a strong and equitable public education system is central to our democracy. We believe our principals and teachers make the critical difference in student achievement. We believe that as adults we are accountable for building and maintaining high performing organizations that ensure all students will successfully acquire the knowledge, skills and values necessary for success.

### **Based on these core beliefs, we are committed to:**

- Providing all students with the opportunity to perform to their fullest potential and ensuring that there is no discernable difference between the achievement levels of students by race, gender or economic level
- Placing a principal with strong leadership and management skills as the key instructional leader in every school
- Ensuring that an effective teacher instructs each class
- Building the capacity of our personnel through meaningful professional development
- Operating effectively and efficiently with fiscal accountability



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- Educating all students in safe and orderly environments conducive to learning
- Giving all students access to a well-rounded, rigorous curriculum that is research-based and data driven
- Securing and allocating adequate resources according to the needs of each child
- Partnering with parents and the community in maximizing student learning
- Embracing our community's diversity and using it to enhance the educational environment
- Basing our educational culture on merit and individual achievement
- Preparing all students to be successful in institutions of higher learning or the workforce without a need for remediation

*Adopted March, 2006*



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## CMS BOARD *of* EDUCATION THEORY *of* ACTION

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### Preamble

In order to make the Vision, Mission, Core Beliefs and Commitments adopted by the CMS Board of Education a reality, we present our theory of action, our strategic approach to improving student achievement. We intend for this theory to drive our planning, goals, policies, budgets and administrative actions. Over time, we believe it will transform the culture of CMS.

Our theory of action builds on both our understanding of how children learn and the conditions that are most conducive to learning – the instructional side of schools. It also creates a framework for the policies, management systems and culture that best promote the commitment and high performance of adults – the operational side. It rests on our research of teaching methods and curriculum as well as best practices most suited to the unique circumstances in CMS and the communities we serve.

### Managed Instruction: The Foundation

Over the last five years CMS has concentrated on building a **Managed Instruction** system, primarily focused at the elementary grades. Essential elements of this system, and the reasons for its success, include:

- A comprehensive, research-based district curriculum that flows seamlessly from one grade level to the next and allows for movement between schools;
- Professional development that is centered on the curriculum being taught, an individualized student information management system that allows teachers to determine the academic strengths and weaknesses of each child;
- Detailed assessments to be used in tracking achievement and driving instruction; and,
- Carefully calibrated and appropriate interventions – by child, by teacher, by subject and by school – to enable principals to keep performance on course.

Prior to Managed Instruction, individual schools were using a wide variety of curriculum programs, many not based on current research. This approach led to mixed results and an inability to provide targeted professional development. The problem was exacerbated by teacher turnover and high student mobility rates, particularly among impoverished children.



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Managed Instruction has helped us improve student achievement, particularly in the elementary grades and to a lesser extent in middle schools. The CMS Task Force report supports this assertion: “From 1998 to 2004, CMS student achievement in elementary and middle schools increased significantly in both reading and math and can be considered strong both in absolute terms and in comparison to students from across the state of North Carolina. Moreover, achievement is improving across all student groups—including White, African American, Hispanic/ Latino, low income, limited English proficient, and special education – and the achievement gap among all groups is narrowing.” High schools are in the beginning stages of implementing Managed Instruction and initial results appear promising.

We are convinced it is necessary to retain the strengths of a Managed Instruction system. However, for all its benefits, Managed Instruction does not stimulate innovation, create incentives for adults or build a performance culture. Therefore, in order to dramatically improve student achievement, it is essential that we incorporate the flexibility required to adjust to the needs and circumstances of each school and its students and to build incentives for innovation.

## Managed Performance/Empowerment: The Next Step

**Managed Performance/Empowerment** builds on the foundation and continues the benefits of Managed Instruction but goes a step further. CMS must be redesigned to manage for performance, moving us beyond a pure managed instruction program to one that recognizes accomplishment and rewards it with additional freedom.

The district's core business – teaching and learning – must be managed by the central office with some flexibility. This flexibility must balance accountability with empowerment according to the needs and performance of individual schools or particular classrooms. The structure of central office support itself must also be decentralized in order to be more responsive to the needs of principals, their schools and the public.

To further clarify our intent, we wish to expand our description of managed performance/empowerment under the following headings:

**Standards** – Managed performance/empowerment begins with standards, including those related to:

- High quality staffing;
- Equitable distribution of resources based on student need;
- Academic content and performance;
- Graduation and promotion;



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- Business processes and fiscal accountability;
- School safety, discipline and student conduct;
- Ethics; and,
- Parent and community satisfaction.

While many standards are already in place, it is the Board's intent that CMS set standards by board policy or management directive, as appropriate, for all important outcomes and processes. Where higher standards will promote excellence, CMS will go beyond federal and state requirements.

Instructional management – Because of high student mobility rates in some schools, the importance of certain subjects in all schools, and required national and state standards, some aspects of instruction must always be managed within fairly narrow district parameters.

However, schools that demonstrate high levels of performance and achievement as measured by CMS' accountability system will be given greater authority and flexibility to enhance the district's core curriculum.

Managed instruction does not necessarily mean managed teaching methods. Our intention is that teachers, working individually and with teams to analyze and develop quality lessons and teaching strategies, be given more flexibility to teach according to their best professional judgment.

We wish to create a performance rather than a compliance work culture and unleash innovation for continuous improvement in teaching and learning as well as school operations. The key to doing this is balancing accountability with empowerment based on the needs of children and school performance. All schools are not the same: the needs of children, the capacity of the workforce, and the concerns of parents vary from one school community to another.

Because principals and teachers must be held accountable for student achievement they should have as much decision-making authority as possible, consistent with effectiveness and efficiency.

**Operational Management** – In a Managed Performance/Empowerment system, schools should be given some degree of control over operations as well as instruction. The amount of control will be based on student, teacher and school performance as measured by the district's accountability system. Schools will be given as much latitude as possible to manage budgets, procurement, hiring and firing, the configuration of workforce, schedules, student affairs, extracurricular activities, and parent and community relations. Where additional training is necessary, it will be made a priority.



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*Because principals are ultimately accountable, they must exercise executive power and have the authority to hold others responsible. However, they should also listen to their school community and involve their employees as much as possible. Striking the right balance between accountability and empowerment is an on-going responsibility of the board/superintendent team. But maximum empowerment for school communities – principals, teachers and parents – within the boundaries of effective and efficient operations, is the means to our primary goal of educating all students.*

**Accountability** – Managed performance/empowerment demands accountability: holding people responsible for meeting standards. Accountability systems for schools and other functional units must identify important performance indicators, measure achievement using these indicators, collect and distribute performance data and apply pre-determined consequences for achieving pre-defined outcomes. Accountability also means individual responsibility for all district employees, parents and students.

**Capacity** – Excellent performance requires capacity, including high quality staffing, facilities, resources, management systems, technology and training. In short, to meet high standards, all involved in CMS need knowledge, skills and tools appropriate to the task. Building this capacity is the responsibility of the board/superintendent team. Therefore, broad public support for our core beliefs and commitments and theory of action will be required.

It is the intention of the board that managed performance/empowerment as a theory of action for change will provide a stable, long-term framework for improving student achievement in CMS.

In order to align all district systems around this theory, significant redesign will be required. The Board of Education will develop policies consistent with this approach. The superintendent is responsible for designing the structure to implement managed performance/empowerment.

**In summary, we believe that managed performance/empowerment combines the effectiveness of a managed instruction program with the dynamics of a performance culture.** It balances performance with empowerment, while ensuring that empowerment follows performance.

*March, 2006*



**GLOBAL COMPETITIVENESS STARTS HERE.**

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REACH FURTHER.



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