



**Central Office Audit
Cabinet Level Searches**

**Presented to:
Oak Park Elementary School District 94
Superintendent Dr. Carol Kelley**



Presented by:

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Background

This proposal is being submitted to Superintendent Dr. Carol Kelley as a follow up to a conversation with Dr. Leroy Nunery, Senior Strategic Advisor for Atlantic Research Partners, on May 3, 2016. Atlantic Research Partners is pleased to present its qualifications and this proposal for an organizational audit and redesign. We have also included a proposal for executive talent identification and search process for several district positions.

We understand that Oak Park Elementary School District 97 (District 97) is experiencing a transition of leadership due to retirements and or departures of some key personnel. We have learned that Superintendent Kelley wishes to examine the processes, systems, roles and responsibilities, and overall functionality of the central office. Additionally, there is an opportunity to reshape and redefine roles and responsibilities, clarifying each function as the new leadership team emerges, including recent hires and current personnel.

In our experience, restructuring a Central office requires review of the district's strategic plan, working climates, and overall goals for the future. New hires must be appropriately "on boarded" and acculturated into their specific roles and onto the Superintendent's emerging team so that their contributions can be maximized. Very often, central offices develop "workarounds", co-dependencies, and other ad hoc methods to get daily work done because individuals are not properly trained to fulfill their roles. The end result of this misalignment is that there is little or no forward planning, insufficient redundancy and backup of critical functions, and when vacancies occur, it is difficult to replicate job knowledge and experience. It is our belief that an effective central office *must* have a game plan that allows for scale, succession planning, and performance management. We know from our past interactions with Dr. Kelley that she is a strong believer in performance measurement and objective setting, and that discipline should be integrated into the new organizational structure. In that way, each individual will have a clearer Idea of the interdependency of his/her role, and how the entire central office works together for shared outcomes.

The University of Washington's Center for Educational Leadership published the Central Office Transformation Toolkit in 2013 (sponsored by the Wallace Foundation), which makes a similar assertion:

"Central offices have vital roles to play in proactively helping principals and teachers build such capacity. Research and experience underscore this vital role for school district central offices in supporting schools' success at scale. This body of work highlights that central offices that build their own capacity for such leadership engage in what we call "central office transformation." Transforming your central office in service of improved teaching and learning throughout your district means more than making some changes in your organizational chart, adding or

eliminating units, or improving the efficiency of your long-standing operations. Instead, central office transformation demands looking deeply at the current work of each and every central office staff person and asking: To what extent can we show that work matters to improving teaching and working districtwide? And if it does not, how can we change how we work to improve the alignment between our core work and real results for students? In districts the researchers observed, nearly all of the central office staff were working to realign daily activities with the ultimate goal of improving teaching and learning. "(p.3, Central Office Transformation Toolkit, 2013)

Atlantic Research Partners subscribes to the theory that each cabinet member's role should have a direct or indirect connection to improving the instructional core and the academic strategic goals of the district. Our approach includes an assessment of how the district's finances, operations, and policies, support the advancement of the instructional core. We think that taking a comprehensive view — as opposed to examining job descriptions — will lead to build the *right* framework for the future of the district. Our comprehensive approach will provide guidelines and proven practices so that the Superintendent's team can increase their overall effectiveness and efficiencies.

Our Approach:

Stage 1: Research and Discovery Process

Before initiating this work, we will confirm the engagement expectations and scope of work. We will also define the process of obtaining essential background information (e.g., the District's strategic plan, organizational charts, essential internal documents, résumés of key personnel, and any other documents that will inform the research. (Note: From our preliminary scan of the District's website, it is not clear if there is an updated or revamped strategic plan. If not, Atlantic Research Partners would be pleased to submit a separate proposal to help the district write a new plan).

We will conduct an initial interview with Superintendent Kelley and others leaders selected by the superintendent to obtain perspective on the concerns and critical issues to be addressed. Our preference is to conduct interviews with key personnel (in person or by phone) before the audit so that we get rich data from qualitative and quantitative perspectives. We recommend interviewing District administrators, school administrators, department employees, and other stakeholders, all of whom will be identified by the Superintendent.

We will examine organizational charts, job descriptions, span of control, leadership meeting schedules, communication tools, evaluation instruments and organizational performance indicators.

Assuming that the information is readily accessible, the Research Phase can be completed in 3 - 4 days. The Research Phase can commence as soon as we are contracted to undertake the work. All documentation, interview notes, and materials will be confidentially maintained, and reviewed only by the ARP team members assigned to the engagement.

Stage 2: Organizational Audit and Focused Review

The organizational audit process will entail the following steps:

- Understand strengths and weaknesses of current organizational structure;
- Identify areas of strength and opportunities for improvement as suggested by cabinet- and site-level leadership in the district; and,
- Compare and contrast Oak Park's organizational structure with other districts of similar size and complexity.

We will conduct a focused review of the highest priority concerns, i.e., how the District's priorities, mission, values and goals are, or are not, being met with the current organizational structure. In addition to identifying areas of excellence within the District, we will highlight opportunities to strengthen services and reduce obstacles to efficiency. We want to uncover if there are issues of resource allocation, talent, or policy that may

be obstacles to achieving peak performance. By examining best practices from successful comparably-sized districts, and using applicable research-based benchmarks, the review will highlight where improvements should be made and recommendations for implementation and reorganization.

A first draft of options for the organizational structure will be developed, indicating:

- (1) Reporting relationships and spans of control
- (2) Recommended organizational structure, with options
- (3) Preliminary job titles and descriptions
- (4) Recommendations for management actions and policy changes.

These findings will be reviewed with the Superintendent for fidelity with the District's priorities, and to ensure we have fully addressed the District's needs, prior to completing a final written report. We expect that Stage 2 will require 7 -10 days to complete.

Stage 3: Implementation

Upon submission of the final report, and at the direction of the Superintendent, we will conduct meetings with any affected parties to discuss the findings and recommendations and, answer questions. If desired by the Superintendent, our team will assist in designing the communications and implementation strategies.

We estimate that Stage 3 will require 1 - 2 days to complete.

Timetable:

We recognize that there is a sense of urgency in launching this project, and we will undertake the work as soon as approval to proceed is given. Overall, we envision that the Organizational Audit could be completed in a 45-day timeframe.

Atlantic Research Partners Team

The Atlantic Research Partners team will be led by two of its senior executives:

James Hager, Ph.D. - President/COO

Jim began his teaching career in 1964 as a science teacher in an all-girls boarding school. He quickly progressed through the administrative chairs as principal, Director of Secondary Education, Deputy Superintendent, and twenty years as a Superintendent of Schools. Following his successful tenure as a school superintendent, Jim spent seven years as a Professor-in-Residence at the University of Nevada, Las Vegas (UNLV) in the College of Education's Department of Educational Leadership. Jim Co-Directed the Center for Education Policy Studies and the Superintendents' Institutes. He also coordinated the Executive Leadership Doctoral Program. His areas of expertise included policy, politics, and governance, organizational development, school improvement, the principalship, and the superintendency. Jim was honored in 2004 by receiving a number of prestigious awards for his leadership as Superintendent. He was named State Superintendent of the Year by both the Nevada State Superintendent's and the Nevada School Board's Associations. He was one of four finalists for AASA's National Superintendent of the Year and was named Plato Learning Corporation's Educator of the Year. He also received various local leadership awards including Educator of the Year by the Reno Chapter of the NAACP.

Leroy D. Nunery II, Ed.D. – Senior Strategic Advisor

Lee Nunery is Senior Strategic Advisor for ARP, responsible for business and program development. He is Founder and Principal of **PIūsUltré LLC**, a strategic advisory firm whose mantra is *“Inspiration, Imagination, and Innovation”* symbolizing its approach to enhancing the strategic and operational capacities of its clients. He returned to day-to-day operation of **PIūsUltré**, after serving the School District of Philadelphia as Special Advisor to the School Reform Commission, Acting Superintendent and CEO, and Deputy Superintendent and CEO. Prior to forming **PIūsUltré**, from June 2005 – August 2007 he was President of School Management for Edison Schools, Inc. From March 1999 to June 2005, Dr. Nunery II was Vice President, Business Services for the University of Pennsylvania. His professional experience includes 16 years in various roles in corporate banking and capital markets, and 4 years with the National Basketball Association as Vice President, Human and Information Resources and Vice President, Business Development. His foundational business experience came from Leroy Nunery & Sons, Inc., an electrical contracting firm started in 1969.

Among other recognitions and awards, he was awarded the Wallace L. Jones Lifetime Achievement Award by the Consortium for Graduate Study in Management, and Lafayette College created the Leroy D. Nunery Award for Intellectual Citizenship, given to a student of color for leadership and academic excellence. In September 2015, Dr. Nunery received the inaugural Alumni Achievement and Community Engagement Award from Washington University's Gephardt Institute for Civic and Community Engagement.

Dr. Nunery is a graduate of Lafayette College (B.A., 1977), Washington University (M.B.A., 1979), and the University of Pennsylvania (Ed.D. 2003).

We may engage other *Atlantic* team members on this project as needed.

Fee Structure

Organizational Audit

The fee structure for the three proposed Stages for the Organizational Audit is \$30,000, excluding costs for travel and materials, which can be capped at a to-be-negotiated level. The pricing reflects expected completion of the entire scope of work, with delivery of a final product within the estimated time frame.

Summary

Atlantic Research Partners is pleased to submit this set of proposals, and looks forward to working closely with Superintendent Kelley and the Oak Park Elementary School District. Our website (www.atlanticresearchpartners.org) offers background on the company and we will be delighted to provide client references at your request.

Please feel free to contact either Dr. Hager (jhager@atlanticresearchpartners.org) or Dr. Nunery (lnunery@atlanticresearchpartners.org) if there are any questions or feedback to this proposal. We look forward to working with Superintendent Kelley and the District 97 leadership team.