



Final Report

MARCH 29, 2022

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Efficiency and Effectiveness Review

CHARLOTTE COUNTY PUBLIC SCHOOLS

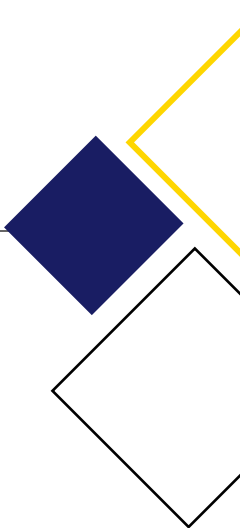


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1. Executive Summary

Background

MGT Consulting Group (MGT) was hired by Charlotte County Public Schools (CCPS) to conduct a high-level efficiency and effectiveness review to study the major functional areas that support the District. The consultant team was charged with conducting interviews with a wide range of individuals in leadership positions as well as reviewing national and local data to understand the position of the District. The consultant team was asked to identify efficiencies that highlighted the financial stewardship of CCPS as well as to identify opportunities for additional efficiencies, staff retention opportunities, and other changes that would benefit CCPS and contribute to student success. The consultant team conducted in-depth interviews with key District leaders and performed in-depth research to identify best practices and trends in K-12 education.

Findings and Recommendations

The District invested in learning and reached higher pinnacles of success. To continue this work, additional support is needed and the District must continue to be intentional and focused on student learning. Next steps include addressing opportunities for increased student learning by addressing personnel issues, student services, systems and technology, early learning support, increased volunteers, enhanced support for safety, and a few other key areas.

Overall, the District has been an amazing, frugal steward of the resources that were afforded through the referendum. Clearly, without the resources the District would not have excelled to the rank of 13th in the State. This momentum is critically important to the continued and enhanced success of the students in the District. Building on these current outstanding results will lead to greater outcomes as the District continues to be a fantastic service to the local community.

If the next referendum is not passed, the District, and therefore, the community will suffer irreparable damage to the current success of CCPS, and these incredible learning gains will quickly dissipate. As a result, students, staff, and the community will be negatively impacted.

Conclusion

CCPS has been very intentional and conservative with budgeting funds to maximize effectiveness and efficiencies. The investment from the referendum has had a positive impact on learning which is apparent through the District's rise in student achievement and accomplishments compared to other districts in the State. These accomplishments are particularly significant during a global pandemic which is especially noteworthy, considering that nationally, districts have struggled to provide continued academic support on targeted needs requiring immediate and intensive interventions. Without the referendum, the District would not be where it is today in terms of student success and achievement.

2. Introduction and Background

MGT is pleased to present the results of this organizational efficiency study with the primary focus of a financial review to ensure funds were properly invested and accounted for. Further, this report is a review of how well each dollar was expended to enhance learning outcomes with the goal of making Charlotte County Schools the number one school district in the state.

District leadership worked closely with a designated oversight committee for reviewing how the funds were managed. District leadership set guidelines for and was frugal with investing the referendum funds directly in learning, teaching, and safety. MGT's analysis and assessment conclude that the District was transparent, intentional, conservative, and effective while being efficient in managing these resources to have the greatest impact on the community. CCPS has undertaken heroic efforts and reached a point of maximum effectiveness without continued and further investment as demonstrated through the analysis, assessments, and recommendations informed by the data collected through this study.

Guiding Questions for this Study:

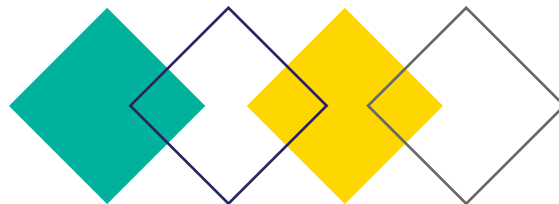
How well has the Charlotte County School District invested funds to maximum effectiveness and efficiencies?

How well did the investment impact learning outcomes?

What is the impact of the referendum?

Prior to the referendum the District cut approximately 200 positions which amounted to 15% of staff which resulted in the District becoming on the verge of ineffectiveness. In the most recent referendum Charlotte County District received \$20M, whereas Sarasota District received \$75M. The District has operated in an extremely conservative and economical manner, and even established a reserve of \$8M, which may serve as an additional investment if the next referendum occurs.

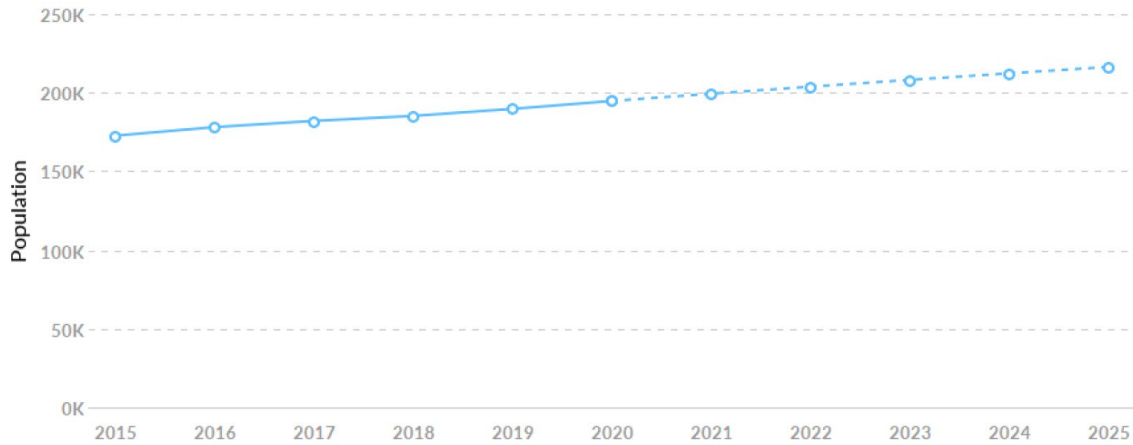
The following section includes an external review of historical and future demographic projections that have the greatest potential to impact the District as well as Charlotte County.



3. Evolving Demographics

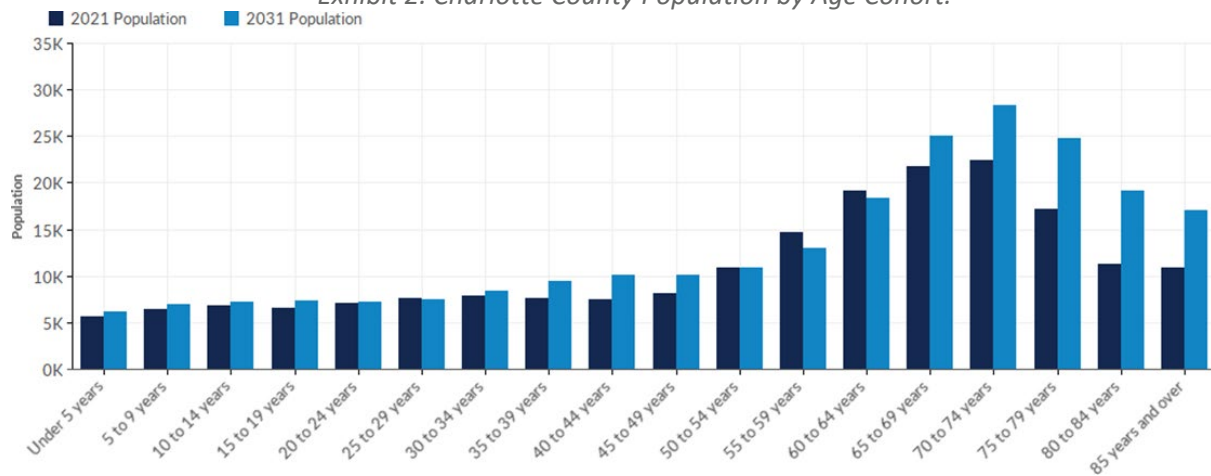
As of 2020 the region's population increased by 12.8% since 2015, growing by 22,104. The population is expected to increase by 11.1% between 2020 and 2025, adding 21,672 people. Exhibit 1 depicts historical and future projections for the local population.

Exhibit 1. Charlotte County Overall Historical and Future Population Projections.



The current population of 199,354 in Charlotte County is projected to grow to 236,883 by 2031. This projected growth increase of 19%, which is a higher percentage increase than the state of Florida (15%) and the national (6%). As shown in Exhibit 2, by 2031 Charlotte County School District faces a projected increase in the school age population by a total of 1,593 people. Of note, Charlotte County is considered the second community in the country with the oldest population.

Exhibit 2. Charlotte County Population by Age Cohort.



3. EVOLVING DEMOGRAPHICS

Exhibit 3. Charlotte County Population by Age Cohort Table.

Age Cohort	2021 Population	2031 Population	Change	% Change	2031 % of Cohort
Under 5 years	5,584	6,187	603	11%	2.61%
5 to 9 years	6,364	6,922	558	9%	2.92%
10 to 14 years	6,788	7,154	366	5%	3.02%
15 to 19 years	6,613	7,282	669	10%	3.07%
20 to 24 years	7,029	7,262	233	3%	3.07%
25 to 29 years	7,623	7,532	(90)	(1%)	3.18%
30 to 34 years	7,838	8,381	543	7%	3.54%
35 to 39 years	7,565	9,381	1,816	24%	3.96%
40 to 44 years	7,465	10,148	2,683	36%	4.28%
45 to 49 years	8,189	10,117	1,928	24%	4.27%
50 to 54 years	10,896	10,863	(33)	(0%)	4.59%
55 to 59 years	14,689	12,990	(1,699)	(12%)	5.48%
60 to 64 years	19,140	18,375	(764)	(4%)	7.76%
65 to 69 years	21,731	25,033	3,302	15%	10.57%
70 to 74 years	22,452	28,339	5,887	26%	11.96%
75 to 79 years	17,203	24,741	7,538	44%	10.44%
80 to 84 years	11,303	19,199	7,896	70%	8.10%
85 years and over	10,882	16,976	6,094	56%	7.17%
Total	199,354	236,883	37,530	19%	100.00%

Source: EMSI Q4 2021 Data Set.

Charlotte County will add to its diversity considering an expected increase in those who are Hispanic (7,881), Black (1,882), and Asian (1,036) as indicated in Exhibit 4. Charlotte County Population by Race and Ethnicity. The impact for Charlotte County Schools may require a greater support for English as a Second Language as well as bi-lingual communication with families.

Exhibit 4. Charlotte County Population by Race and Ethnicity.

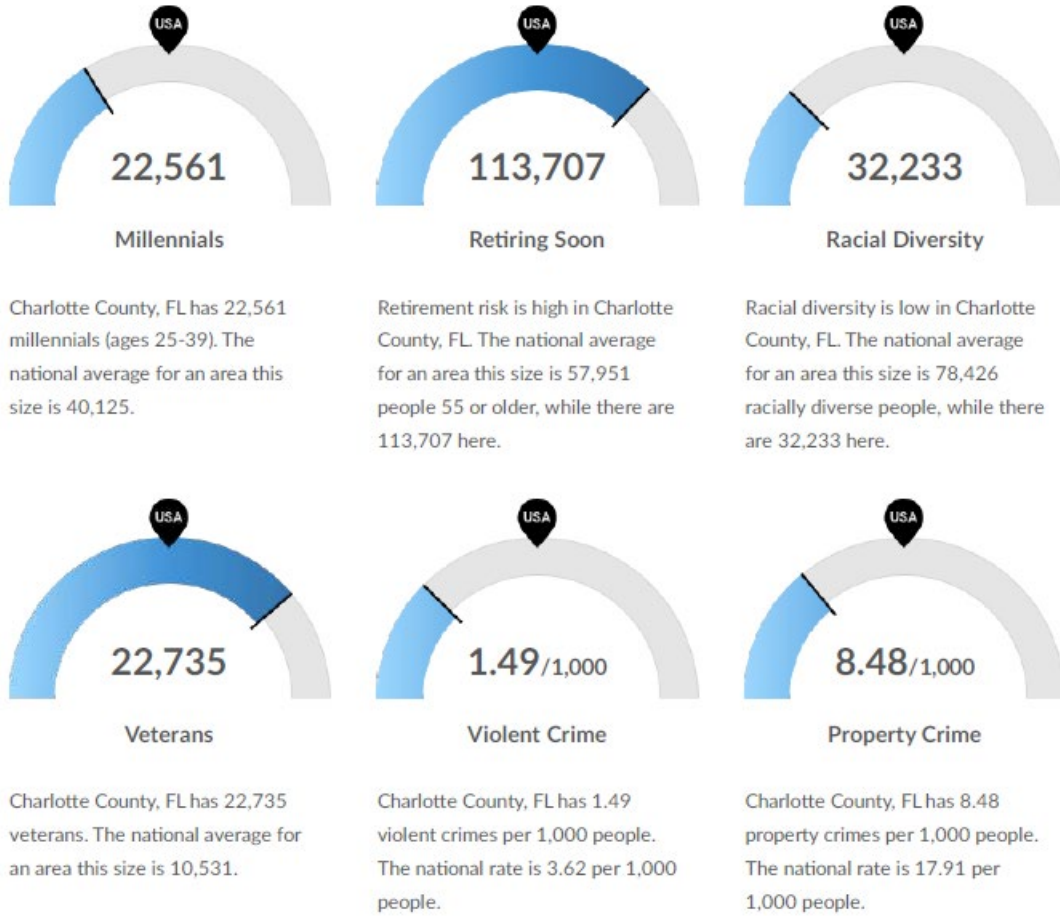
Race/Ethnicity	2021 Population	2031 Population	Change	% Change	2031 % of Cohort
White, Non-Hispan	165,966	191,547	25,581	15%	80.86%
White, Hispanic	14,365	21,783	7,418	52%	9.20%
Black, Non-Hispani	10,827	12,709	1,882	17%	5.37%
Two or More Races	2,811	3,542	731	26%	1.50%
Asian, Non-Hispani	2,804	3,840	1,036	37%	1.62%
Black, Hispanic	1,034	1,444	410	40%	0.61%
American Indian or	549	710	161	29%	0.30%
Two or More Races	509	581	71	14%	0.25%
American Indian or	272	386	113	42%	0.16%
Native Hawaiian or	101	138	37	36%	0.06%
Asian, Hispanic	76	129	53	69%	0.05%
Native Hawaiian or	40	76	36	89%	0.03%
Total	199,354	236,883	37,530	19%	100.00%

Source: EMSI Q4 2021 Data Set.

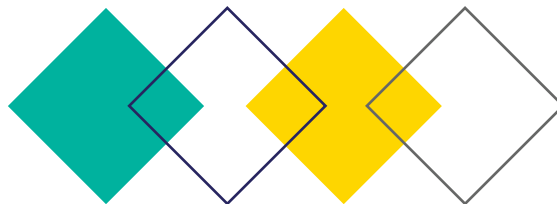
Population Characteristics

The following population characteristics, shown in Exhibit 5, highlight elements with the potential to impact the District. The limited number of millennials and high number of people retiring soon may impact recruitment and retention of teachers and staff. The low violent and property crimes compared to a region of this size makes the area an attractive place to live and learn.

Exhibit 5. Charlotte Population Characteristics



Source: EMSI Q4 2021 Data Set.



Impact of Demographics

Charlotte County is projected to continue to grow in size through at least 2031. During this time, the large portion of the growth is expected to be in the 65 years old and older categories. The school age population is still expected to increase by 1,593 children and it is likely that many of those children will attend CCPS. At the same time, the typically working population in the 25-65 age range is expected to grow at a more moderate pace and increase by a total of 4,384 people. Specifically looking at the 50-65 age range, the population is expected to decrease by 2,496 people. Charlotte County will become more diverse by 2031, with every race and ethnicity group projected to grow throughout the county.

The changing nature of Charlotte County will have a direct impact on CCPS. Hurricane Charley required rebuilding 6 new schools and 2 support buildings. The rebuilds of 2 other schools occurred in 2011 and 2015. The District has not built a new school since 1996. The District estimates it could be another 10 years before a new school is needed. Thus, the District should have capacity to meet these needs. The district must also work to ensure that high quality staff are able to be recruited and retained to support students in and out of the classroom. With a large decline anticipated in the 50-65 age range, the district should anticipate early retirements and a shortage of more seasoned teachers and support staff. The district will need to continue to strategically enlist the 65 years old and older population to provide many part-time and full-time support functions.

Though retirees living in the area may subscribe to the notion that they should not have to contribute to the cost of public education in the community, and there might be a lack of understanding of the positive impact of education on the economy. Education supports the high-quality services members of the community expect and wish to access with ease. In addition, the cost of education is low compared to the extreme cost of housing for those who are incarcerated.

4. District Comparisons

The District compares itself to other districts to gain insight and benchmark efforts by considering peers, competitors, and aspirational districts. The districts and their comparisons can be seen in Exhibit 6.

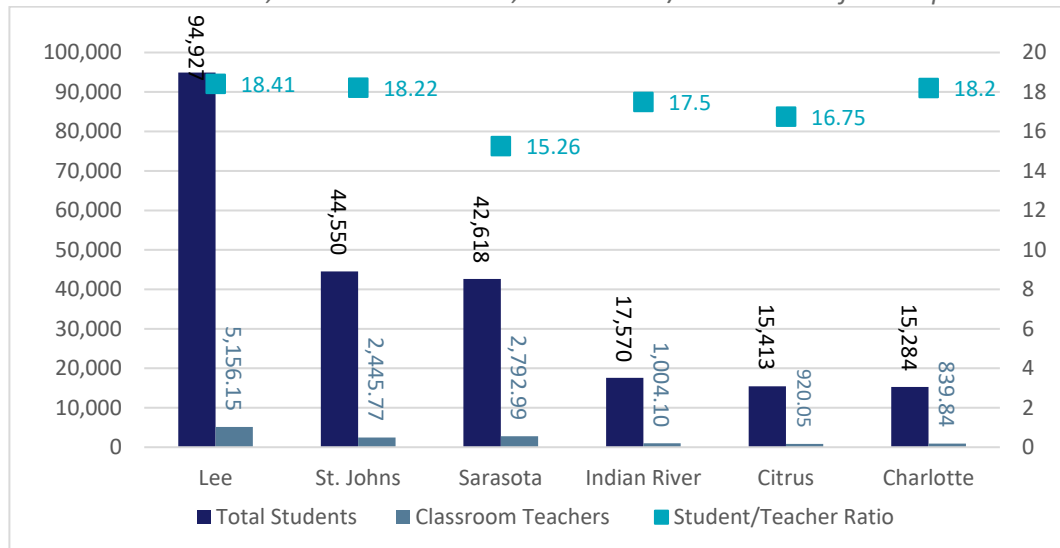
Exhibit 6. District Comparisons

Florida District	Type of Comparison	Total Students	Classroom Teachers	Graduation Rate	Student/Teacher Ratio	Dollars per student	Expenditures as % of Revenue
Charlotte	Self	15,284	839.84	90.9%	18.2	\$10,526	93.8%
Citrus	Peer	15,413	920.05	88.1%	16.75	\$9,825	97.8%
Indian River	Peer	17,570	1,004.10	95%	17.50	\$10,815	97.2%
Lee	Competitor	94,927	5,156.15	85.1%	18.41	\$11,171	102.1%
Sarasota	Competitor	42,618	2,792.99	91%	15.26	\$13,400	93.8%
St. Johns	Aspirational	44,550	2,445.77	95%	18.22	\$10,639	91.0%

Source: <https://nces.ed.gov/ccd/districtsearch> and Charlotte County Public Schools

Charlotte County Public Schools has a student/teacher ratio of 18.2:1, which is higher than the average of the comparison districts. The average student/teacher ratio of all comparison districts is 17.4:1. **Therefore, compared to the districts listed, CCPS has on average one more student per teacher.** The smallest student/teacher ratio among the comparison districts is Sarasota, with a ratio of 15.3:1, and the largest is Lee, with a ratio of 18.4:1. When looking at Florida as a whole, the average student/teacher ratio for k – 12 is 16:1¹. CCPS spends approximately \$10,526 per student while the average expenditure per student of the group above is approximately \$11,062. CCPS spends 93.8% of revenue and has the lowest percentage of expenditure of the identified peer group.

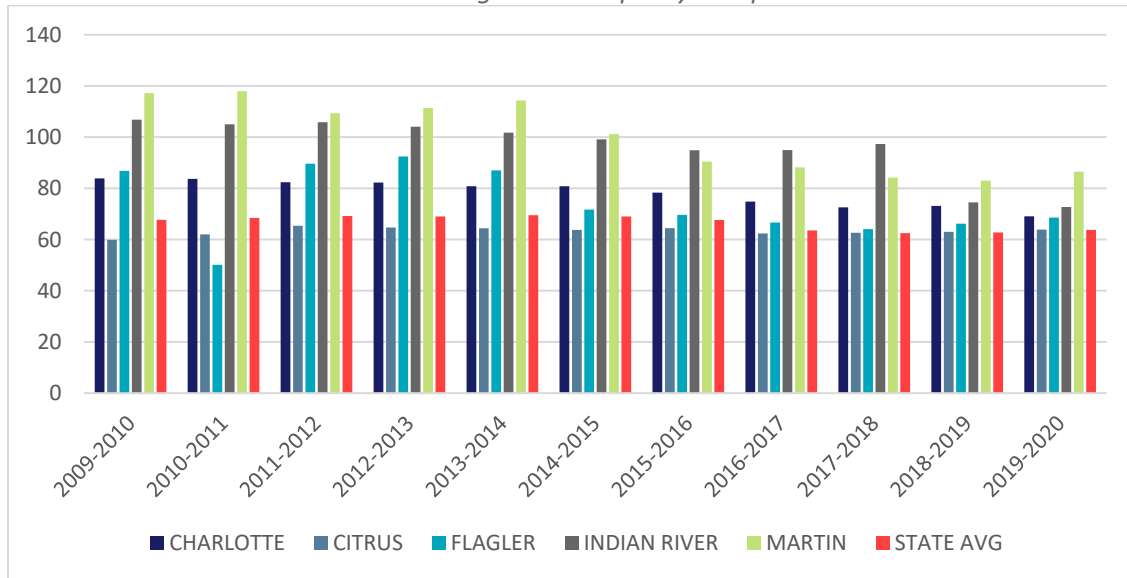
Exhibit 7. Total Students, Classroom teachers, and student/teacher ratio for compared districts



¹ <https://www.publicschoolreview.com/average-student-teacher-ratio-stats/national-data>

Exhibit 8 compared the bus occupancy of several school districts, including Charlotte County Public Schools, over the past 10 years. Overall occupancy rates show a distinct downward trend, most easily observable in Indian River and Martin. CCPS continues to be the 3rd largest of bus occupancy of the peer group and has more occupancy than the State average.

Exhibit 8. Average Bus Occupancy Comparisons

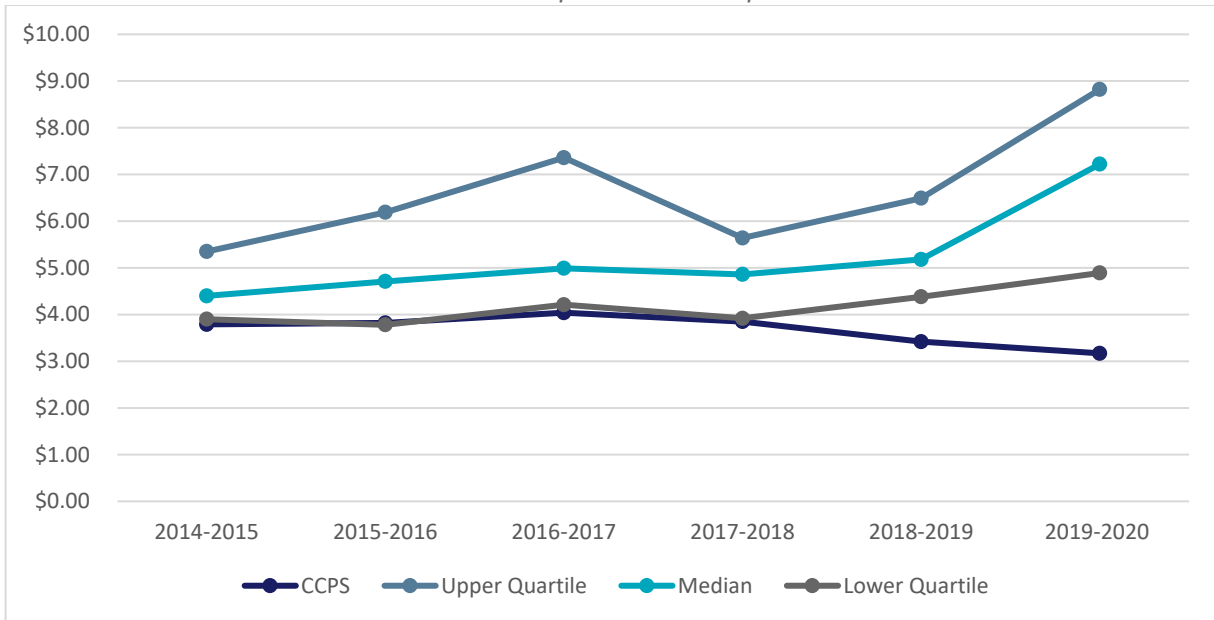


Year	Charlotte	Citrus	Flagler	Indian River	Martin	State Avg
2009-2010	83.88	59.9	86.81	106.83	117.23	67.68
2010-2011	83.73	62	50.17	104.99	117.97	68.43
2011-2012	82.42	65.41	89.66	105.86	109.33	69.23
2012-2013	82.25	64.72	92.46	104.06	111.42	69
2013-2014	80.82	64.38	87.05	101.78	114.36	69.51
2014-2015	80.81	63.78	71.68	99.17	101.19	69.02
2015-2016	78.36	64.44	69.66	94.87	90.45	67.64
2016-2017	74.83	62.38	66.63	94.93	88.19	63.59
2017-2018	72.56	62.63	64.11	97.33	84.22	62.49
2018-2019	73.16	63.05	66.2	74.49	83	62.76
2019-2020	69.07	63.9	68.56	72.71	86.54	63.8

Source: CCPS, 2022

Exhibit 9 shows the transportation cost per mile of CCPS as compared to other Greater City Schools districts. Together with Exhibit 8, the data shows an increase in costs per mile as occupancy decreases with time, even more so in recent years. CCPS continues to be efficient and effective in transportation costs compared to other districts.

Exhibit 9. Transportation Costs per Mile

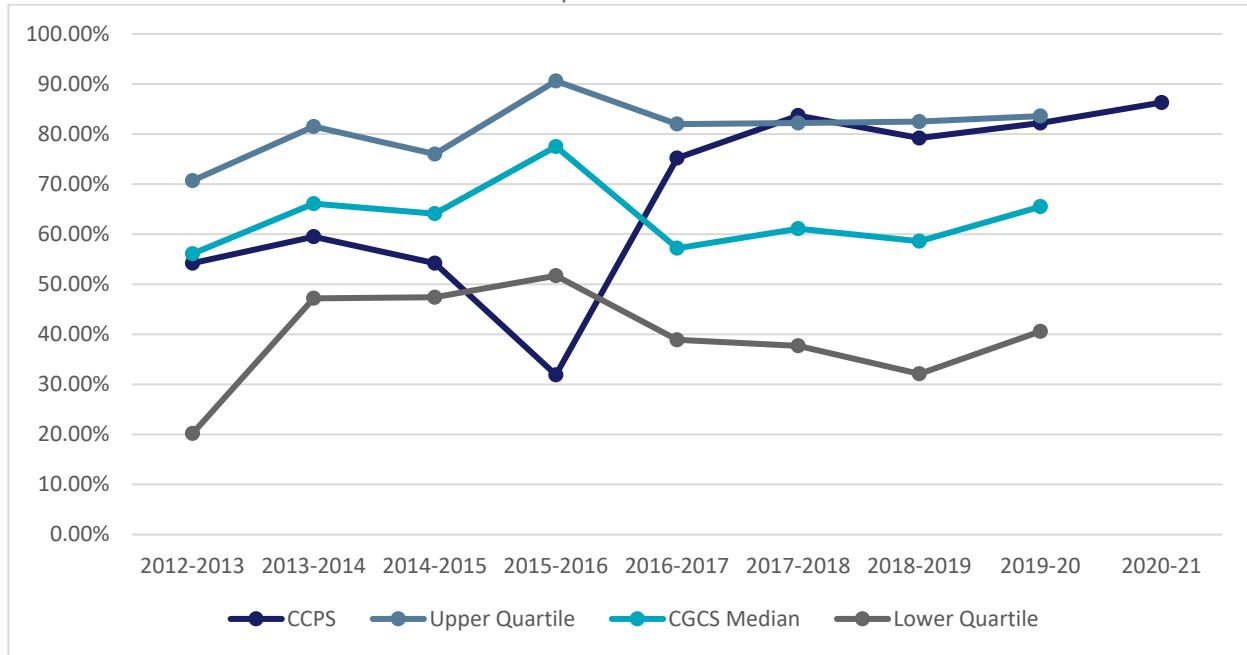


	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020
CCPS	\$3.79	\$3.82	\$4.04	\$3.85	\$3.42	\$3.17
Upper Quartile	\$5.35	\$6.19	\$7.36	\$5.64	\$6.49	\$8.82
Median	\$4.40	\$4.71	\$4.99	\$4.86	\$5.18	\$7.22
Lower Quartile	\$3.90	\$3.78	\$4.21	\$3.92	\$4.38	\$4.89

Source: CCPS

CCPS is continuing to increase the number of competitive bids they receive to ensure that they are receiving the best value for their large purchases. For the past five years, CCPS continues to be in the upper quartile of school districts in competitive procurements compared to other Greater City Schools.

Exhibit 10. Competitive Procurement Ratio

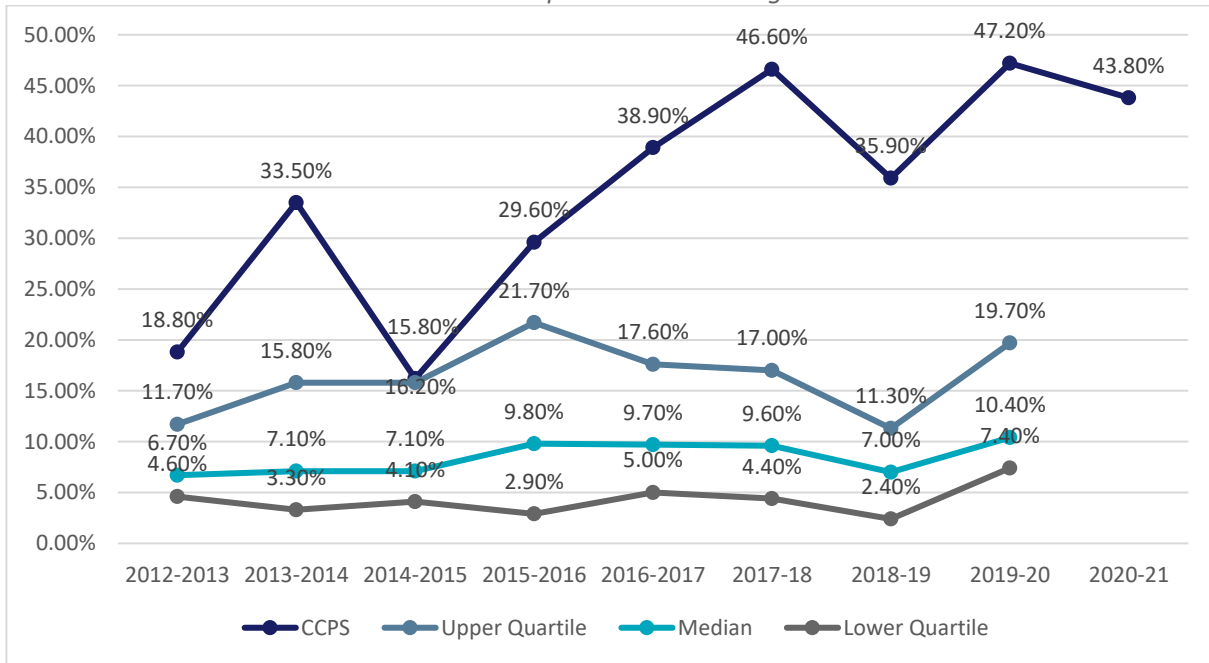


	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-20	2020-21
CCPS	54.20%	59.50%	54.20%	31.90%	75.20%	83.70%	79.20%	82.20%	86.30%
Upper Quartile	70.70%	81.50%	76.00%	90.60%	82.00%	82.20%	82.50%	83.60%	
CGCS Median	56.10%	66.10%	64.10%	77.50%	57.20%	61.10%	58.60%	65.50%	
Lower Quartile	20.20%	47.20%	47.40%	51.70%	38.90%	37.70%	32.10%	40.60%	

Source: CCPS

CCPS continues to strive to become more efficient with purchasing, as they work cooperatively with other entities to create discounts in purchasing. Cooperative purchasing allows groups to collaborate to create bulk purchases to lower direct costs to members and CCPS has dramatically increased cooperative purchasing over the past eight years.

Exhibit 11. Cooperative Purchasing Ratio



	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-18	2018-19	2019-20	2020-21
CCPS	18.80%	33.50%	16.20%	29.60%	38.90%	46.60%	35.90%	47.20%	43.80%
Upper Quartile	11.70%	15.80%	15.80%	21.70%	17.60%	17.00%	11.30%	19.70%	
Median	6.70%	7.10%	7.10%	9.80%	9.70%	9.60%	7.00%	10.40%	
Lower Quartile	4.60%	3.30%	4.10%	2.90%	5.00%	4.40%	2.40%	7.40%	

Source: CCPS

5. Summary of Findings and Analysis

Overall, Charlotte County School District was transparent, intentional, conservative, and extremely resourceful in managing funds to ensure the maximum impact on the community. CCPS was an effective steward of the resources afforded through the referendum. The following includes a summary of the efficiency and effectiveness of each of the major functional areas that support the District, as well as opportunities for improvement that were identified throughout the study.

District Organization

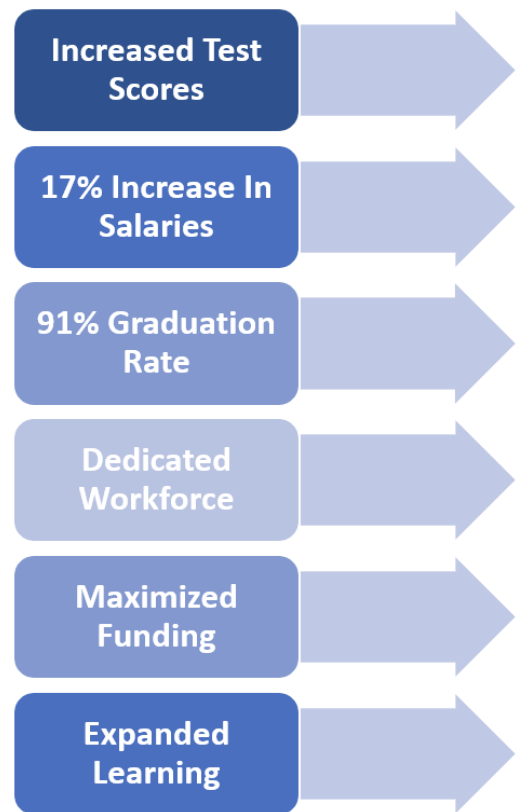
Organization and Management

EFFICIENCY AND EFFECTIVENESS

- District Leadership is proud of the many accomplishments that have occurred, especially such notable impact as moving the District from 47th to 13th in the state.
- CCPS expanded the school day by 30 minutes in 2019 after voters approved a tax increase during the 2018 referendum. Research shows that:

Expanded learning time can raise achievement by ensuring students have more individualized learning time. Not only does more time allow for longer class periods in which students can examine topics in greater depth and in varied ways (e.g., not only dissecting a text, but also acting it out), but expanded-time schools are also able to set aside whole periods each day to focus on small-group interventions to address and overcome student learning deficits. More time also helps to ensure the inclusion of the critical classes that too often have been scaled back, such as science, social studies, and foreign languages.²

- The District is proud to celebrate an increased graduation rate of 91%, which was based on very



² National Center on Time & Learning. Why Expanded Learning Time? Raise Achievement. Retrieved February 16, 2022 from <http://www.timeandlearning.org/why-more-school-time/raise-achievement>

intentional steps to work with College Board and ACT to determine and implement available resources for students and teachers.

- Professional Development further supported teachers’ and paraprofessionals’ growth and enhanced education in the classroom.
- Due to the increase of available funding from the referendum, all 9th graders were able to take PSAT, followed by another opportunity in 10th grade with state funding, and then complete the SAT test in 11th grade, also with the assistance of state funding. In 12th grade, referendum funding assisted students who had not yet passed the required state

Cohort	Scheduled Graduation Date	Concordant Scores
Those who entered 9 th grade in 2019–2020 and beyond	Spring 2023 and beyond	<p>Students can <u>only</u> use newly adopted scores</p> <p>For Grade 10 FSA ELA:</p> <ul style="list-style-type: none"> • 480 on SAT EBRW • An average of 18 on ACT English and Reading <p>For Algebra 1 EOC:</p> <ul style="list-style-type: none"> • 430 on PSAT/NMSQT • 420 on SAT Math • 16 on ACT Math • 499 on FSA Geometry EOC
Those who entered 9 th grade between 2010–2011 and 2018–2019	Spring 2022 Spring 2021 Spring 2020 Spring 2019 Spring 2018 Spring 2017 Spring 2016 Spring 2015 Spring 2014	<p>Students can use last-adopted scores</p> <p>For Grade 10 FSA ELA:</p> <ul style="list-style-type: none"> • 430 on SAT EBRW • 24 on SAT Reading subtest • 19 on ACT Reading <p>For Algebra 1 EOC:</p> <ul style="list-style-type: none"> • 97 on PERT Mathematics <p>Students can also use the newly adopted scores</p>

assessments to earn a standard diploma take the SAT or ACT during the school day in order to earn a concordance score to graduate on time.

- Students were able to complete courses and activities to improve course credit recovery that allowed them to stay on track or get back on track for graduation.
 - The District also purchased Canvas, a learning management system to support student success and provided additional professional development for teachers.
- Prior to COVID (2019), district scores indicated 56% in ELA achievement, 61% in math achievement, and 61% in science. After the return to school (2021), students dropped slightly in ELA and math to 55% and science to 58%. CCPS improved in ranking in these areas against other districts as such: ELA – 19th; Math – 16th; Science – 14th.
 - With a 17% increase in salaries, CCPS is the third highest district in beginning teacher pay which entices teachers to come and stay.
 - CCPS has dedicated individuals in high impact areas including professional development, exceptional student services, elementary and secondary education, school improvement, title management, grants, and curriculum and instruction. Funds have been allocated in ways that are perceived as maximizing support for these subject areas.
 - Staff members view District Leadership as trusting, empowering, and good at delegating responsibility and authority to accomplish work, which is considered positively impactful on increasing productivity.

- District staff shared and noted a dedicated workforce with a spirit of passion for learning and a heart for compassion. Many described the willingness of employees to reach out, collaborate, and ensure they can count on one another.
- Efficiency is a point of pride with many, describing teams that understand the importance of efficiencies and sharing stories that support and outline examples.
- Created videos and enhanced websites in some areas of the district to respond to frequently asked questions which reduced the number of phone calls and communications to find more information.
- Many departments have moved to digital record keeping instead of paper forms, creating efficiencies where staff are not re-typing.

CHALLENGES AND OPPORTUNITIES

- Staff and Leadership desire additional professional learning to continue to raise the quality of classroom instruction, student support, and professional development for career growth.
- The leaders of the Division of School Support and the Division of Learning both juggle multiple tasks with less personnel due to position reductions that occurred in 2017. Student Support positions serve two roles; District Assistant Superintendent for Learning also serves as the Director of Secondary Education and District Assistant Superintendent for Student Services also serves as the Director of Student Services. This structure limits the opportunity for seamless and extended support for the content areas and the educational levels. In other words, though the Assistant Superintendent for Learning will meet with elementary leadership, she may not be able to meet with them as often as she would like to address specific needs without scheduling additional meetings and opportunities to connect when she must address secondary leadership concerns concurrently. Without hiring additional leadership to separate these roles, the opportunity to the District to elevate student success is limited by the sheer nature of the organizational structure. Hiring a Director of Secondary Education and a Director of Student Services as new positions provides capacity for Assistant Superintendents to expand their support at all levels as they continue to drive student success and positively impact the District and community.
- Increased professional development and training could enhance usage of technology and elevate student success especially with Multi-Tiered Systems of Support (MTSS) and Canvas learning management system. Training and simulation for safety is another opportunity which is currently limited due to staffing. Lack of time to pull together employees such as all 186 ESE teachers, limits time for critical training and professional development. Student Support staff noted the need for more time to reflect and use data to enhance effectiveness especially with MTSS.
- CCPS needs to continue to establish manuals to capture policies and procedures. With turnover and retirements continuing to increase, capturing and maintaining knowledge of how processes and procedures work will be critical to the District's continued success. District Support departments have manuals, processes, and procedures in place for training new employees.

- As CCPS and the Charlotte County area continue to become more diverse, it is critical to meet the evolving needs of the community. This effort should include increasing parent education and finding more ways to educate and engage families to support students.
- Expand Student Services by adding a position at the District Level with a sole focus on this area. This position can work to strategically address many of the areas noted as recommendations.
- Charlotte County boasts a very talented population. Citizens could be more involved with the students to share time and talents with the students and promote a better understanding of various generations. Increasing the number of community volunteers provides a unique opportunity for additional access and transparency for members of the community to better understand the school environment within CCPS.

School-Based Leadership

EFFICIENCY AND EFFECTIVENESS

- CCPS increased access to school-based mental health experts, working with colleges and universities to drive interest in these areas. The District trained 1,142 staff in youth mental health first aid. Additionally, social workers, school psychologists, and school resource officers are available to support students where they are. The District currently has two paid psychologist interns and will add two more for next year. The goal of the school psychologist internship program is to quickly fill the immediate need for mental health support as well as to establish a pipeline for potential future professionals after graduation from college.
- The ability to effectively respond to school-based mental health issues has been a challenge over the last 20 years as the ratios of school-based mental health professionals to students exceeded nationally recognized levels. The start of the 2017-18 school year began with 1 social worker per 2,357 students and 1 school psychologist per 1,873 students. The efficient use of funding lowered these ratios by over 60% for the start of the 2021-22 school year. The ability to provide school-based mental health services has allowed for proactive interventions including case management.
- The District is proud that it continually works to meet every security and mental health recommendation created following the school shooting in Parkland. In particular, the District has maintained a safe culture at school without increased expulsions. Additionally, suspensions at CCPS are in alignment with demographics and are lower than the state averages. Three years ago, the District had a safety audit and met every indicator. To continue to be proactive in this area, the Compliance Officer seeks feedback from principals to determine how to respond with greater fidelity.

The goal of the school psychologist internship program is to quickly fill the immediate need for mental health support as well as to establish a pipeline for potential future professionals after graduation from college.

- The District exceeds state averages in attendance rates and immunizations and meets all Department of Health mandated requirements with monthly and annual data reporting. Data reporting includes oversight at the state level with the Florida Department of Health and Department of Education.
- The District added guidance counselors to provide a wholistic approach and support for students. As a result of increased support for students, CCPS was able to contract with Charlotte Behavioral Health Center for a mental health therapist and conducted 66 psychiatric and 50 mental health consultations.
- Psychologists track evaluations, students consulted, average report turnaround time, and number of direct student services. During their monthly meeting, the top three are recognized in each category.
- Social workers have eight indicators for tracking performance and must show artifacts. Some of the indicators include attendance, school safety, and Value-Added Model (VAM) scores, which is a measure of students learning growth.
- Reading and math coaches were added throughout the district to positively impact student learning.
- The State mandates how student progress is monitored. Increasing reading on grade level is extremely important when it comes to measuring student success. Reading proficiency is the desire of CCPS. The District psychometricians capture data that is used for continuous improvement conversations and action planning with school leadership.

CHALLENGES AND OPPORTUNITIES

- CCPS has an opportunity to create the best possible foundation for student learning. More reading coaches and math coaches are needed at each grade level band (elementary, middle, and high) to assist in the mitigation of learning loss resulting from the various consequences of the pandemic and to ensure students are accelerated to on-grade level achievement and beyond.

- Based on an internal study on Elementary School Counselor Time Sampling Data Analysis 2020-2021 SY, elementary counselors have a lot of different duties that are pulling them away from their primary functions. As of 2021, CCPS has an elementary counselor to student ratio of 1:607 and the American School Counselor

	Average % of time	Conversion to hours/minutes per day
Direct Services	24%	1 hr. 48 min.
Indirect Services	34%	2 hr. 33 min.
Program Defining / Managing / Assessing	35%	2 hr. 38 min.
Non-School Counseling Tasks	7%	32 min.

Association (ASCA) recommends 1:250. A recent CCPS time sampling shows that on average counselors only spend 24% of their time on direct services and 34% of the time on indirect services when the ASCA recommends 80% should be spent on these activities (ASCA, 2019). While this specific study focuses on elementary counselors, interviews indicated that middle and high school counselors are also balancing a myriad of services and tasks throughout a normal school day.

- Hiring more support staff, including guidance counselors and psychologists, is important to student success. The district needs 20 more guidance counselors to have at least two at every school. The district has already increased the number of psychologists but have a critical need to continue to increase mental health staffing to assist with addressing student health and safety concerns after they have been identified. The biggest challenge is finding people to fill these highly professional positions, which have an average salary of \$75,000 to \$85,000. Since positions are challenging to fill, the district is partnering with Florida Gulf Coast University to establish an internship program that will allow qualified college students to provide services under the direction of school psychologists.
- Hiring additional reading and math coaches would support student success. Hiring additional English Language Learning staff and teachers would help to meet current and future need based the projected growth and diversity of the local population in the next ten years and beyond.
- It can be difficult to meet the requests for behavioral support. The District has 12 behavioral specialists for 21 schools. Two or three more could make a difference.
- CCPS has the systems in place to conduct online registration for families but inconsistencies in registration processes were identified throughout the district. Online registration for students needs to be consistently used throughout the district.
- The District understands and values the critical foundation that early learning affords students. The Head Start Program is great, but more could be done to enhance reading and math skills to impact success futures for students. Ensuring every student is a level 5 reader is worth the investment.

Human Resources

EFFICIENCY AND EFFECTIVENESS

- Human Resources modernization is shifting from paper to a digital system, using applicant tracking software and providing better support for those who are out of town. There is also an online system to manage substitutes.
- Employees tend to continue in their positions and be retained at high levels for many years. The District has a succession plan that is based on elevating school-based leadership. Annually, the latest successions are reviewed, and the process is adjusted to ensure position needs are met.
- The Human Resources Evaluation systems requires at least three goals. Employees report with artifacts mid-year and at the end of the year. Most departments are easily able to provide Key Performance Indicators (KPI's) and measurements with Human Resources or District Leadership.
- In alignment with national trends, retaining high quality teachers is a challenge. For a variety of reasons, both personal and professional, high-quality teachers are leaving the classroom and pursuing other opportunities within and outside of K-12. CCPS has worked to retain teachers by offering competitive wages.
- A classification and compensation study was conducted by a contracted service in the past and continues to be conducted in-house as CCPS reviews and revises job descriptions. The labor

supply, wages of competitors, and demographic changes are considerations in the determination of appropriate work hours, work calendars, and wages.

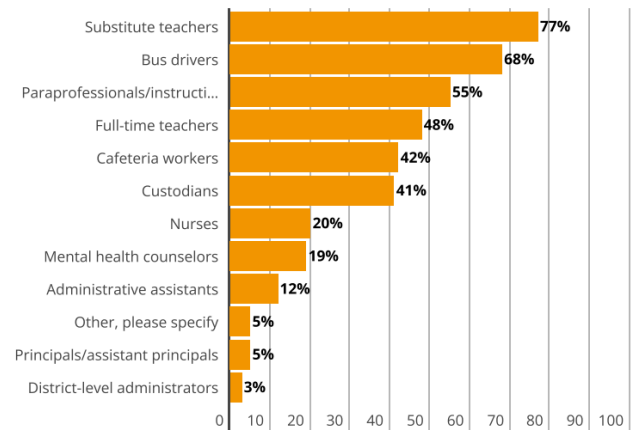
- The District offers and incentivizes support services personnel with opportunities for professional development. This is an efficient way to retain critical support positions and allow for pathways towards staff or leadership positions within the CCPS family.

CHALLENGES AND OPPORTUNITIES

- The average age of district personnel continues to rise and many key district staff members are approaching retirement. With many retirements looming, many offices will lose significant knowledge, skills, and abilities that will not be easy to immediately replace and rebuild. Opportunities exist now to identify and develop the next generation of leadership at CCPS.
- Additional opportunities to retain high-quality teachers should be elevated, including expanding professional development and other programs that provide teachers pathways for career growth as well as continuing to work to provide excellent benefits.
- The number of substitute teachers as impacted by COVID continues to be a concern. The labor supply, wages of competitors, and demographic changes are considerations in the determination of appropriate work hours, work calendars, and wages.
- Insurance is expensive for the district and for employees. The insurance is self-funded, and the District has explored options for relief with no success. Cost factors that affect the high cost of insurance for CCPS employees versus the “normal” or average group are based on age/sex factors (demographics) which is 24.6% higher than the normal group and percentage of payments incurred the prior year which is 12.1% higher than the normal group. CCPS employees pay 66.4% more out of pocket and have fewer discounts than the normal group.
- Extreme rising costs related to local housing and lack of housing are a challenge for employees and for families, which makes it hard to recruit employees. As wealthy retirees continue to move into the area, the affordability for working- and middle-class families continues to diminish.
- The District should include additional professional development time for teachers. These professional development times should be embedded and be part of the pay structure. With the quickly evolving landscape of teaching, including the increased use of technology and need for timely and accurate reporting, teachers need additional time and support to ensure that they are meeting the needs of the District. Early release days provide an opportunity for professional development that does not impact student contact time and falls within contracts. Professional development days around the time of progress monitoring windows would allow for all teachers to participate without concern of a lack of substitutes or loss of instructional time. Principals also have been clear that they want to return to half days to allow for professional development after student contact time, every quarter.
- Nationally, teachers are leaving or considering leaving the profession in extremely high rates, which the District also faces. Last year, 25% of teachers thought about leaving classroom

teaching.³ CCPS had 385 staff and 186 teacher separations between February 2021 and February 2022.

- CCPS is struggling to maintain essential services, including custodial, transportation, food service, and substitute staff. These positions were commonly held by local retirees who wanted to work part-time and support the community. Many of these individuals stopped working due to being a high-risk individual during the COVID-19 pandemic. At the time of this report, CCPS has at least 88 support positions available for hire. This shortage aligns with national trends that show that other districts across the country are struggling to hire support positions.⁴ “Meanwhile, shortages of school nutrition workers and custodians have led to teachers cleaning their own classrooms a few times a week, and administrators stepping in to keep the chaotic breakfast and lunch lines moving smoothly. According to the EdWeek Research Center survey, more than two-thirds of school district leaders and principals say they’re struggling to hire a sufficient number of bus drivers. Forty-one percent said the same about custodians, and 42 percent said the same about cafeteria workers.”



*Respondents are principals and district leaders.

SOURCE: EdWeek Research Center survey, 2021

- Employees described the inefficiencies of paper processes and the paper waste. One example is that payroll is outdated with lots of paper and based in Excel. Sick and leave requests are paper and pen forms. These processes have the opportunity to be converted into online and fully-digital transactions.
- CCPS could benefit from establishing a remote or flexible work policy for some positions throughout the district.
 - Employees have requested opportunities to have flexible or remote working schedules. While these types of arrangements are not possible for every position in CCPS, it is important to consider the opportunities that come with remote and flexible working arrangements. Remote, hybrid, or summer flex policies may be beneficial to explore, especially during the summer months when school is not in session. Remote opportunities also provide benefits to employees who may have an unexpected medical

³ Suddath, C., January 2022. Bloomberg Equality. *More teachers than ever are considering leaving the profession.* Retrieved February 21, 2022 from: <https://www.bloomberg.com/news/newsletters/2022-01-06/more-teachers-than-ever-are-considering-leaving-the-profession#:~:text=Teachers%2C%20a%20profession%20overwhelmingly%20made,than%20in%20non%2Dpandemic%20years.>

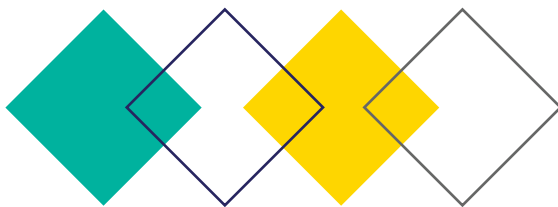
⁴ Will, M., December 2021. EdWeek. *The Teaching Profession in 2021 (in Charts).* Retrieved February 21, 2022 from: <https://www.edweek.org/teaching-learning/the-teaching-profession-in-2021-in-charts/2021/12>

or other leave need that can allow for accommodations to work from home instead of taking medical leave.

- In addition to hearing feedback from employees at CCPS about increased work flexibility, national trends indicate that flexible work arrangements are highly desired throughout the workforce
 - “In a survey of more than 2,100 people who have been working remotely during the pandemic, a whopping 58% said they would 'absolutely' look for a new job if they were required to return to in-person work.”⁵
 - “Overall, 65% of employees want to work remotely full-time post-pandemic, and another 33% prefer a hybrid work arrangement of remote and in-office work, according to the survey. Just 2% would prefer to return to the traditional office on a full-time basis. While workers are most concerned about COVID-19 exposure/infection (49%), having less work flexibility (46%) and less work-life balance (43%) are other key apprehension points in returning to traditional workplaces.”
 - “The concept of working from home also will provide the district more year-round staffing flexibility during the summer”
 - “Remote and flexible work has tremendous benefits for employers when done well. Companies with flexible and remote work programs see increased retention and reduced turnover, improved productivity and efficiency, a larger and more diverse candidate pool, reduced operational and real estate costs and a reduced environmental impact.”
 - Remote and hybrid work environments can also create workspace efficiencies that allow for a smaller footprint of office space.

Governance

There was no evidence during this study that board governance is misaligned or over-reaching. The superintendent is empowered to lead the district and make necessary decisions for the efficient and effective management of the school system. The board has approved investments in safety, transportation technology, and energy savings. These allow the district to operate both more effectively and efficiently. Moreover, the board has approved the use of ESSER-CARES funding in a fiscally responsible manner by ensuring that one-time money is spent on one-time expenditures, thus preventing budget shortfalls when the funding ceases.



⁵ <https://districtadministration.com/requiring-employees-to-return-to-school-get-ready-for-them-to-quit/>

Financial Management

Organization and Management

EFFICIENCY AND EFFECTIVENESS

- Overall, the District has been an amazing steward of the resources the afforded them. In the most recent referendum Charlotte County District received \$20M, whereas Sarasota District received \$75M. Charlotte County District has been frugal and established a reserve of \$8M, which may serve as an additional investment if the next referendum occurs.
- Charlotte spends approximately \$10,526 per student while the average expenditure per student of the peer group is approximately \$11,062.

CHALLENGES AND OPPORTUNITIES

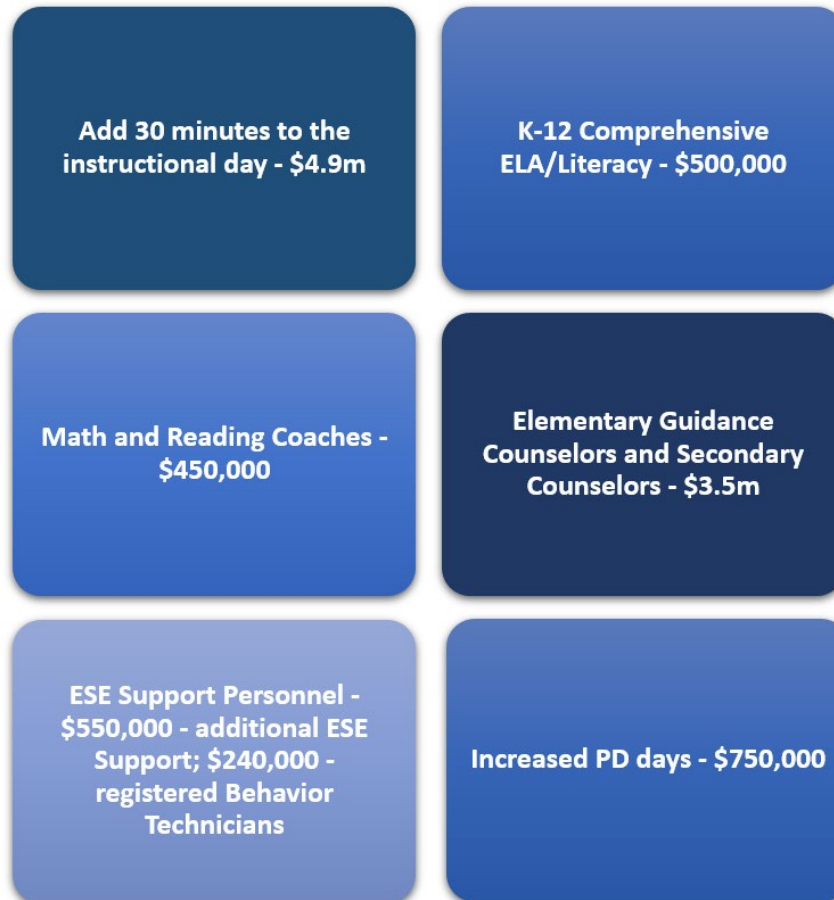
- Funding is a complex challenge. Some units receive funding from six or more sources. When funding is removed from one source, the result can be a position that goes from full-time to part-time or has to be reconceived to meet the needs.

Finance

EFFICIENCY AND EFFECTIVENESS

- CCPS has effectively kept their costs low, with total expenditures around \$174M in the 2020-2021 academic years.
- The District executed a well-devised plan for the financial management of District operations in order to contribute to the continued and enhanced success of the students in the District. Focus on student success and impact to the community were the main drivers of these decisions.
- With oversight from the School Board, the District was extremely conservative and strategic with referendum funds, placing them in a strong financial position.

CCPS Funding Initiatives



CHALLENGES AND OPPORTUNITIES

- In order to sustain the above-mentioned initiatives and avoid further reduction in staff positions or student programming, additional referendum funding is essential. If the upcoming referendum does not pass, the current gains in staffing will need to be reduced with essentially 50 positions instantly going away along with the reversal of the additional 30 minutes added to the school day. Without this additional funding, a negative impact on student learning and, therefore the community at large is likely to occur.
- CCPS is encouraged to continue to be cautious stewards of their funding dollars, focusing on areas that will impact student success the most.
- Streamline processes for managing multiple budgets, including grants and community support funds. This will allow for easier accounting, greater accountability, and more efficient and effective use of funds. Some grants or budgets can be used for a wide range of items while other funds can only be used for specific items or projects. A streamlined process will allow the district to use funds with specific purposes to support those efforts while possibly freeing up funds that can be used for other projects, items, or initiatives.

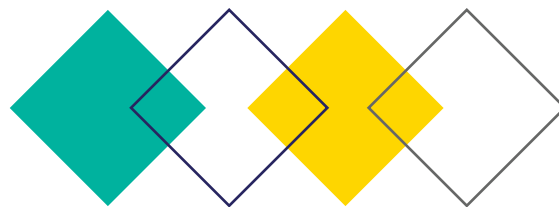
Purchasing, Contracting and Warehouse

EFFICIENCY AND EFFECTIVENESS

- Enhancements in procurement included a shift from cost bids to value bids, RFPs, and invitations to negotiate. Access to a national database of procurement awards allows for insight into competitiveness and range of bids. The District has a certified buyer position that works with other districts and municipalities to strengthen savings on items like fuel and other major acquisitions.

CHALLENGES AND OPPORTUNITIES

- The District should continue to expand its opportunities in procurement and work with other districts and municipalities to obtain additional cost savings.



Facilities Use and Management

Management and Organization

EFFICIENCY AND EFFECTIVENESS

- The District currently operates with an adequate number of security personnel. The addition of safety and security positions ensures that school resource officers are placed at every school with school security officers in every secondary school. In addition to increased security personnel, CCPS has implemented the Raptor Alert System, installed/replaced/upgraded surveillance cameras, gates, fences, and single points of entry.
- An Active Assailant One Button System is currently being installed at all locations that will also alert local law enforcement. The new voice over internet phone system installed District wide works with the lockdown system.

A One-Button Lock Down system is currently being installed at all locations that will also alert local law enforcement.

CHALLENGES AND OPPORTUNITIES

- Every incident highlights opportunities to fortify and strengthen the District in terms of being more proactive and more responsive. These challenges can present opportunities for continued and enhanced safety measures.
- While the District operates with an adequate number of safety personnel, the District needs to add safety staff at each elementary school for redundancy to ensure coverage when staff attendance issues occur.
- To continue to ensure that CCPS has the highest level of safety and security at each school, a security monitor should be placed at every elementary school to assist the School Resource Officers.
- Painting and landscaping will continue to beautify the District facilities. These efforts help to make sure that everyone is comfortable and accommodations are welcoming. Investing in the learning environment will improve pride in the District for students, staff, and teachers.

Information Technology

EFFICIENCY AND EFFECTIVENESS

- While Information Technology had prior measures of performance and success (KPIs and SLAs) and is now working to review and adapt to post-pandemic standards.
- CCPS is working to make improvements in the student registration system and has the necessary tools to implement district-wide online registration.

- Information technology, in collaboration with Finance and Human resources, conducted a full Business Process Review as a strategy to enhance the utilization of and needs identification within the ERP system.

CHALLENGES AND OPPORTUNITIES

- Outside safety threats are a constant concern including cyber threats as well as identity theft. These threats are not unique to CCPS but the district must prioritize investing in top notch security to ensure the safety and security of outside threats, including personally identifiable information of students and district staff. A data breach can quickly cost a district thousands or millions of dollars. In 2020, the average cost of a cyber breach for a school district or education organization was \$3.79 million.⁶
- Increasing usage of a district-wide online registration system is an opportunity to continue to improve the registration experience for families and school staff. Many of the schools throughout CCPS continue to use paper registration processes that require families to print and fill out forms only to have someone at the district type those forms into the record keeping systems. Transitioning to a completely online student registration system would allow for families to complete the information online, review the information for any errors, and register students at times and locations that are more convenient. Families who do not have information change from year to year will have an even more efficient registration process in subsequent years, as they will only need to review most information to complete registration for their children. Additionally, District staff will save a considerable amount of time by not typing information that is completed on handwritten forms. This time can be redirected to other registration or return-to-school functions.
- CCPS can create efficiencies and increase transparency in finance through transitioning a variety of functions from paper to electronic. One example of an opportunity is transitioning the current paper process in payroll to an electronic process. This office has limited staff and the time saved through digital recordkeeping would allow the payroll staff to focus on processing special payroll and other employee payroll support. Converting to electronic payroll will also allow employees to be able to look up available leave balances in real-time.
- Improve Technology on the business side, where changes and implementations are lagging behind. Investment in technology has been on the education side, which was the priority. At this point, the focus needs to shift to improving some of the employee facing technology systems.

⁶ Belastock, E., 2022. Education Next. *Our Biggest Nightmare is Here*. Retrieved February 21, 2022 from: <https://www.educationnext.org/our-biggest-nightmare-is-here-cyberattacks-targeting-school-districts-how-can-schools-respond-data-secure/#:~:text=Cybersecurity%20insurance,report%20on%20data%2Dbreach%20costs.>

- Data governance is an area that needs to be enhanced and needs more structure to further analyze the data the District collects and evaluate the current work that is in progress as well as inform decisions to enhance future work.
- Increase IT administrator support for managing EdIS and ensure redundancy in supporting this early warning signs tool. Currently, the administration for this system is managed by the content area and could benefit from IT support.

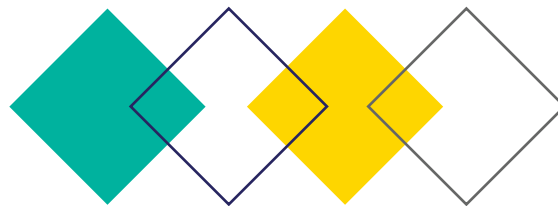
Maintenance & Custodial Operations

EFFICIENCY AND EFFECTIVENESS

- Maintenance crews use technology to digitally manage and address work orders. Every maintenance technician has an iPad to access the work order system and access information about each school.
- The Maintenance and Operations Department have a new voice over internet phone system, and they are able to track all asset information including age, replacement age, status, and other details. These details allow the District to maintain better routine maintenance, asset repair, and replacement records and timelines. These efforts allow for assets to be utilized to their fullest life cycle and allow CCPS to establish a rotation for system replacements. Planned system replacements save the District money when compared to emergency replacements.
- Workorder completion times are in accordance with the timeline as outlined by The Council of Greater City Schools.

CHALLENGES AND OPPORTUNITIES

- CCPS should continue to use the processes in place for Workorder Completion.
- The District should continue to explore additional planned system replacements and other cost savings opportunities.



Transportation

Organization and Staffing

EFFICIENCY AND EFFECTIVENESS

- Staffing is appropriate for the size of enterprise being undertaken by the Transportation Department. The leadership structure is divided by region and balanced. The systemic approach of staggered bell times allows CCPS to operate their transportation network with less personnel, which is of great benefit during the current nationwide driver shortage.

CHALLENGES AND OPPORTUNITIES

- CCPS is struggling to maintain essential services, including transportation staff. These positions were commonly held by local retirees who wanted to work part-time and support the community; however, many of these individuals stopped working during the COVID-19 pandemic.
- Charlotte County has a high number of people retiring soon, may increase the applicant pool for services such as transportation. The low violent and property crimes compared to a region of this size also makes the area an attractive place to live.

Operations

EFFICIENCY AND EFFECTIVENESS

- Transportation systems and services are intentionally designed to provide optimal services using digital routing and GPS software. The District boasts the youngest bus fleet in the state and has implemented a plan to buy 10-12 buses a year to ensure buses are less than 13 years old and have no more than 250,000 miles. Having a young bus fleet provides savings with better fuel efficiency and ensuring buses having the latest safety features available. Transportation has equipment that allows for towing of broken-down buses and district vehicles back to fleet services garages. The mobile app provides parents and care givers with real-time tracking of their students' buses. The bell schedule is used for efficient operation and all schools are scheduled so students arrive 20 minutes before the first bell and can get breakfast.
- Integration of Where's the Bus® technology allows for CCPS parents to use an app on their personal mobile devices to see where their child's bus is located at any time while riding a district school bus. This data provides an estimated time of arrival that increases the oversight and management of district school buses and can reduce wait-times for parents and students at bus stop locations throughout the county.



CHALLENGES AND OPPORTUNITIES

- Continue to explore the use of technology to enhance the efficiency of CCPS transportation systems.

Food Services

EFFICIENCY AND EFFECTIVENESS

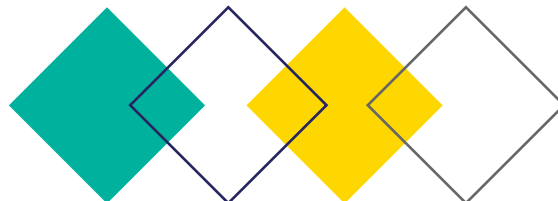
- The response to the pandemic including the mobile distribution of breakfasts, lunches, and snacks to students who needed them, exemplifies the priority for meeting the needs of students where they are. The District has worked to maintain high levels of meal distribution efficiency and has effectively used USDA funds to keep student meal costs low or free throughout the District.
- Food and Nutrition Services tracks meals per labor hour by day and by week to ensure staff hours align with the number of meals served to students in each school. The Food and Nutrition Services team are self-funded and often meets or exceeds performance goals. The District does not need to subsidize CCPS Food and Nutrition Services.



Weekly Meals per Labor Hour Calculator		Your work appears in		Instructions: Enter "0" for zero.			
SCHOOL:	EES	2020/2021		Enter your daily numbers in the white boxes. The calculations will appear in the purple boxes.			
WEEK OF:	10/4/2021	DATE ENTERED:		10/07/21			
		MANAGER:		LEAH MOORE			
		MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	
		Total	Calc Total	Total	Calc Total	Total	Calc Total
MGR HOURS		8	8	8	8	8	8
STAFF HOURS		32	32	32	32	24.5	24.5
STAFF OVERTIME HOURS		4	4	4	4	4	4
SUBSTITUTE/ CEP HOURS		0	0	0	0	0	0
Breakfasts		321	214	324	218	304	203
Lunches		849	849	538	538	550	561
Ala carte \$		53.65	13.46	62.8	15.78	51.7	12.97
Snacks		76	25	82	27	78	26
Total Meals			802		795		806
Results Window							
Total Meals			802		795		806
Labor hours			44.00		44.00		36.50
Meals per Labor Hour			18.22		18.07		22.09
Average Meals per labor hour							
5-Day Week			19.75				
4-Day Week			24.69				
3-Day Week			32.91				
Lunch = 1 meal equivalent						Goal 19	
Breakfast = .66 meal equivalent							
Snack = .33 meal equivalent							
Ala carte = 1 meal equivalent per \$3.985							
negative balance							
Average						792	

CHALLENGES AND OPPORTUNITIES

- CCPS worked throughout the pandemic to ensure that as many students as possible have access to nutritious meals. Should support for free lunch not continue through the USDA program, CCPS should consider allocating resources to ensure that all students have access to free meals so all students are ready to learn.



6. Conclusions

Charlotte County Public Schools is an excellent opportunity for children in the Charlotte County community to learn and grow. The District continues to work diligently to increase their ranking in the State and aspires to be the top school district in Florida. The District Leadership, teachers, and staff have creatively filled essential needs, including through doubling up employee roles, while ensuring that student academic performance and graduation rates continue to increase.

For Charlotte County Public Schools to continue advancing the success and achievement of students, the focus needs to remain on learning as well as the focus on building a strong foundation for students with consideration for all aspects of the student. Safety is critical to success. Teacher support is critical. Collaborating across departments and working together with principals on a weekly basis will continue to move the District forward with one voice, one team, and one message.

The recommendations included in this report provide a strong foundation to further CCPS' success by focusing on student learning, needed personnel, systems and technology, professional development, safety, volunteers, early learning, the learning environment, free meals, family support, student services, policies and procedures.

CCPS has been very intentional and conservative managing financial resources to maximize effectiveness and efficiencies. The investment from the referendum has had a positive impact on learning which is apparent through the District's efforts to increase in student achievement and accomplishments when compared to other districts in the State. These accomplishments are particularly noteworthy during a global pandemic which is especially noteworthy, considering that nationally, Districts have struggled with supporting students with continued learning gains. Without the referendum, the District would not be where it is today in terms of student success and achievement.



6. CONCLUSIONS

As a result, we have concluded that Charlotte County Public Schools is efficient and effective overall under the following six operational areas:

CCPS EFFICIENCIES

1. District Organization

- Moved from 47th to 13th in the state; added 30 minutes to the school day; increased graduation rate to 91%
- Dedicated workforce; salary increase of 17%
- Opportunities for additional positions, professional learning, training, and updating to digital processes

2. Financial Management

- District executed a well-devised plan for the financial management of District operations
- Continue to be cautious stewards of funding dollars, focusing on areas that will impact student success the most

3. Facilities Use and Management

- Added safety and security positions, security measures, and technology updates has been very beneficial
- Seek opportunities to fortify and strengthen the District in terms of being more proactive and more responsive
- CCPS met best practices in all categories within the 2021-2022 FSSAT

4. Information Technology

- Made great strides in Cyber Security; continue to invest in security resources to protect District assets
- Achieved 1:1 devices for students that greatly assisted in remote learning but will need to continue to refresh devices as they age and become obsolete
- Continues to leverage technology and access to data to lessen manual process loads, guide district decision making in student learning offerings, and enhance operational effectiveness

5. Transportation

- Transportation systems and services are intentionally designed to provide optimal services
- Continue to explore the use of technology to enhance the efficiency of transportation systems; explore methods of increasing applicant pool for positions

6. Food Services

- Worked to maintain high levels of meal distribution efficiency; effectively used USDA funds to keep student meal costs low or free
- Consider allocating resources to ensure that all students have access to free meals
- Food Service is self-funded and receives no financial assistance from the CCPS budget