

**Iredell-Statesville Schools**

**Organizational Profile**

**P.1 Organizational Description**

Iredell-Statesville Schools, referred to in this application as ISS, is a kindergarten through grade 12 public school system located in the southwestern piedmont region of North Carolina. There is considerable diversity present in the communities that make up this school district, with upscale homes on Lake Norman to high-density rental properties housing federally subsidized housing clients in Statesville, the county seat. There is also diversity in the economy of the region where business and industry characterize the southern part of the county and rural farmland prevails in the northern section. The intersection of Interstates 40 and 77 bodes well for future economic development. The county population grew from 122,660 (2000) to 149,877 (2007) and is projected to grow to 189,818 (26% growth) by 2015 according to a recent report commissioned by the Board of Education and County Commissioners.

**P.1a (1) Main Educational Programs, Offerings, and Services: Delivery System**

ISS offers a variety of courses and education programs to meet students’ needs. K-12 course offerings include the four basic areas of English (reading and writing), math, science, and social studies. K-12 offerings are enhanced with a full-range of offerings in the visual and performing arts, foreign language, health and physical education, honors and advanced placement courses, and career and technical education. These courses are delivered in heterogeneously grouped K-2, K-5, 6-8, 9-12 classrooms, 2 at-risk/behavior schools, virtual, and early college settings and taught through state curriculum standards nested in the *North Carolina Standard Course of Study for Grades K-12 (NCSCOS)*. Additionally, the school system offers virtual learning in computer lab settings to address the learning styles of at-risk and gifted students’ needs for grades 8-12, on-line dual credit courses for high school and four-year colleges, dual enrollment courses in partnership with the local community college at the community college site and short term alternative site placement programs for out of school and in school suspensions. The school system also offers extended day and extended year programs for enrichment and extended learning time with support from community partners (SHAKE, SPARK) for a safety net and enrichment. The system offers a wide variety of co-curricular programs in the arts and athletics. Community partners also sponsor instruction for such programs as Junior Achievement, DARE, Kids Vote, swimming, fire safety, teen health, health-related issues and KIDS Count. Before and after school care and academic support are provided through the school district’s program called Prime Time.

Services offered to provide support for the delivery of education programs include exceptional children’s programs, pre-school, ESL services (Title III), at-risk (Title I), staff development (Title II), and innovation (Title V). Student support services include health related support programs,

guidance services, drop-out and Student Assistance Program services, day treatment/reporting, differentiated diploma, and homebound services.

**P.1.a(2) Organizational Culture**

ISS has committed itself to a culture based on the principles and practices of performance excellence. Consequently, it has an operational Strategic Plan linked to the State Board of Education’s Five Strategic Priorities. Seventeen measurable objectives are included under these five priority goal areas. Division, department and school improvement plans are aligned to the strategic plan. Strategies are also provided that are aligned to action steps in division, departmental and school improvement plans. The strategic plan and the aligned operational plans provide clear direction and vision to the entire school system.

**Figure P.1-1 ISS Culture**

<b>Vision</b> – A school system committed to improving student learning by igniting a passion for learning.
<b>Purpose/Mission</b> – “rigorously challenge all students to achieve their academic potential and to lead productive and rewarding lives.”
<b>Values</b> <ul style="list-style-type: none"> <li>• Student and learning focus</li> <li>• Motivated faculty and staff</li> <li>• Partnerships and teamwork</li> <li>• Continuous improvement focus</li> <li>• Management by fact</li> <li>• Results focus</li> </ul>
<b>Strategic Priorities</b> <ul style="list-style-type: none"> <li>• High Student Performance</li> <li>• Healthy, Safe, Orderly and Caring Schools</li> <li>• Quality Teachers-Administrators-Staff</li> <li>• Strong Family-Community-Business Support</li> <li>• Effective-Efficient Operations</li> </ul>

**P.1a(3) Workforce Profile**

The ISS workforce totals 3416 employees. The minority percentage for staff demographics is 14.8% African American, 1.3% Hispanic, 83.6% white and 0.3% other.

There are three groups of employee categories (P.1-2) including certified instructional (1584), classified (1736), and certified administrative staff (96). Within each group, there are several different segments of staff. Certified instructional staff segments include elementary, middle and high school teachers and student services personnel. Classified staff segments include non-instructional and instructional support. Administrative staff segments include central and school building support.

ISS has the following requirements; OSHA, Fair Labor Standards Act, American Disabilities Act, Family Medical Leave Act, North Carolina General Statute 115-C/323, and others.

ISS key workforce expectations and requirements are defined by the North Carolina Principal/Teacher Working Conditions Survey and the ISS Classified Working Conditions Survey and include leadership, (the ability to guide, direct, or influence people), empowerment (involvement in decision making), time (time to collaborate with their peers),

professional development (learning about job requirements and best practice), facilities and resources (safe and adequate facilities and adequate resources), and competitive benefits and salary/pay.

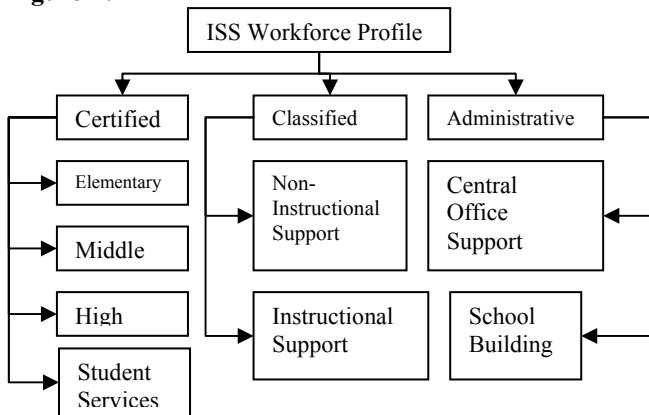
Of the certified staff, 38% have master’s degrees and 153 hold National Board Certification.

ISS workforce job diversity includes teachers, instructional facilitators, instructional technology and software specialists, EC specialists and media coordinators in the elementary, middle and high segments. In the certified segment of student services, job diversity includes health professionals, guidance counselors, social workers, and psychologists. In the classified segment of non-instructional support, ISS job diversity includes transportation, maintenance, child nutrition, district and school office support, and computer/network technicians. Within the classified segment of instructional support, ISS job diversity includes teacher assistants, media assistants, and instructional technologists.

There are no organized labor units within the school system.

ISS offers the following key benefits: competitive salary, cafeteria benefits package, retirement, sick, personal and professional leave days, paid holiday and annual leave days, term life insurance, wellness program, employee assistance program and more.

**Figure P.1-2**



**P.1a (4) Major Technologies, Equipment and Facilities**

Currently, there are nineteen (19) elementary schools, seven (7) middle schools, five (5) high schools, two (2) early colleges, and two (2) alternative schools in the district, and four (4) support facilities. School facilities range from the most modern to those in need of renovation or replacement. ISS has upgraded and increased the number of computers in the system with over 8,600 computers and no computer over three years old. The district has upgraded to wireless solutions provided through radio/microwave at 100% of school sites which allows the wide area network (WAN) traffic to move at a greater speed. The system has 100mb going to the internet which allows for increased speeds to the internet as well as video and audio stream.

The school system operates the largest transportation business in the county (227 buses) serving over 10,000 students daily and the largest food service business in the

county (33 cafeterias) with kitchen equipment required by local and state regulatory agencies. The system has over \$111 million in capitalized assets (any asset that is over \$1,000) utilized in learning programs and support services.

**P.1a(5) Regulatory Environment**

North Carolina operates a highly centralized public education system. ISS is one of two systems in the county. Students attend within their boundaries; however, ISS collaborates with neighboring districts and private schools to attract students. Local education agencies are governed by a State Board of Education and its State Department of Public Education, which are responsible for state and federal funding as well as providing a statewide *Standard Course of Study* to which local school systems must adhere. Assessments include state mandated end-of-grade tests in grades 3-8, 3<sup>rd</sup> grade pre-test, end-of-course tests in 11 high school subjects, a 10<sup>th</sup> grade comprehensive test, and 8<sup>th</sup> grade technology and basic skills tests required for graduation. Students have the option to participate in SAT, PSAT, ACT and Advanced Placement testing. ISS must meet or exceed high student achievement standards of the state’s Accountability, Basic Skills and Local Control Plan (ABCs) as well as the standards of the federally mandated *No Child Left Behind (NCLB) Act*. The U.S. Congress also mandates certain laws to govern federal expenditures for public education, such as the comprehensive *No Child Left Behind Act*. Federal and state legislative requirements also exist for such programs as Exceptional Children and Career-Vocational/Technical Education. ISS is also subject to such federal and state mandates for environmental protection, American Disabilities Act, Fair Labor Standards Act and OSHA.

The state requires that Safe School Plans, which include emergency planning, be developed and implemented. School Improvement Planning (SIPs) is also a state requirement. ISS Board of Education mandates systemic and systematic use of the Model for Performance Excellence and PDSA cycles. ISS aligns its SIP goals and objectives to its Strategic Plan. The school district is also subject to local fire, building and watershed codes.

The accrediting bodies for ISS include the Southern Association of Colleges and Schools and the State Board of Education. ISS was one of the first 30 in the nation to obtain district accreditation from the Southern Association of Colleges and Schools. Teachers and administrators are certified by the NC Department of Public Instruction, under policies and processes established by the State Board of Education. Under NCLB, teachers and teacher assistants have additional certification requirements to be designated as highly qualified.

Local and state requirements and general statutes establish the district boundaries. ISS serves primarily students within these boundaries. ISS is bounded by the county line with the exception of Mooresville City limits which encompasses Mooresville City Schools.

The 2006-07 ISS budget is \$160,832,809, with 65% coming from state funding, 10% federal, and 25% from local and other revenue sources. The capital budget is \$13,578,277. To ensure responsible stewardship of financial management,

ISS complies with the fiscal policy and regulations that are mandated by the state. The state requires accountability through financial reporting and audits. Compliance to regulatory requirements is assessed by the state using external auditors. The school system conducts internal and external audits in compliance with the American School Business Officials standards for financial accounting and reporting.

**P.1b(1) Structure, Governance, and Reporting Relationships**

ISS is governed by a seven-member elected board of education, with alternating four-year terms by district. The school board meets bi-monthly, and as otherwise needed, to set overall direction and policy for the district, ensure appropriate management and fiscal responsibility, and the protection of stakeholders’ interests. The board appoints a superintendent as its secretary and chief executive officer. The superintendent hires the required finance officer and other central office administrative, supervisory and administrative support personnel upon the approval of the local board of education. Senior leadership for the school system is defined as the superintendent, Dr. Terry Holliday, and his direct reports. Currently, the direct reports include the Deputy Superintendent, Associate Superintendent for Learning, Chief Finance Officer, Chief Technology Accountability Officer, Assistant Superintendent of Human Resources and the Director of Public Information and Community Relations. The superintendent and school-based teams interview and recommend the hiring of school principals to the local board of education. The governance parameters of the district are contiguous with the county line, with the exclusion of the boundaries of the Mooresville Graded School District.

The superintendent is responsible for implementing policy, establishing administrative procedures, and maintaining district operations. Senior leadership and the board have established a strategic plan to set direction for the district. The superintendent and his staff have developed operational plans and policies to ensure effective and efficient operations within the school district and its thirty-five schools. Specific organization levels and reporting relationships are included in the organizational chart.

**P.1b(2) Student and Stakeholder Groups**

ISS has identified its key stakeholder groups as students, parents, partners, staff, community and business. ISS segments the student group by program, by grade and by demographic group. Student segments by program include regular (88.4%), exceptional children (11.6%), ESL (4.5%), AIG (8.7%), college prep (45.7%), and tech prep (48.7%). Student segments by school level/grade include elementary (k-5), middle (6-8), and high school (9-12). Student segments by demographics include white (72.4%), black (14.5%), Hispanic (8.2%), and economically disadvantaged (35.2%).

The district’s key market segment includes school-aged children between the ages of 4-18 who live in the district boundaries and are eligible for public education. A smaller market segment includes children within the ages of 3-21 who are eligible for special education services.

The key requirements for student/stakeholder groups include the district’s five strategic priorities: High Student

Performance; Healthy, Safe, Orderly and Caring Schools; Quality Teachers, Administrators, and Staff; Strong Family, Community, and Business Support; and Effective and Efficient Operations (Figure p.1-4).

**P.1b(3) Suppliers and Partners**

The district’s numerous key partners/collaborators (Figure P.1-3) are active contributors in helping the district achieve its mission and goals. Partners participate on school and district improvement teams, advisory committees, and specific task forces. Their feedback and recommendations are used by the district as input into the strategic planning and improvement processes. Our partners and suppliers work side-by-side with district staff to continuously improve key work processes using the PDSA methodology as described in P.2c. Partners and suppliers work with the district in developing innovative organizational processes (i.e. energy education 7.3-4).

**Figure P.1-3 ISS Strategic Partners/Collaborators**

Partner	Role
Chamber of Commerce/Economic Development	Education Foundation, workforce development, recognition of staff, funding support, and business partner development
Boys and Girls Club	Mentors, tutors, parent training, extended day and year programming
Mitchell Community College Gardner Webb UNCC	Early College, Tech Prep articulation, teacher assistant preparation, South Statesville Skills Center, teacher training, administrative training
Statesville Housing Authority	Statesville Skills Center, extended learning opportunities
Iredell County Partnership for Young Children	Alignment of pre-school programs
PTA’s	Resources and support
Faith Based Community	Tutors, mentors, school supplies, resources
City of Statesville	Partner for VPAC
Barium Springs	Space for alternative school and support services for alternative school
Mooresville	Recreation facilities and water/sewer

ISS also partners with volunteers that serve students as mentors, tutors, lunch buddies, etc. Volunteers also assist schools and teachers with clerical tasks and other support for the classroom. ISS’s encouragement and support of volunteers resulted in significant increases in volunteer hours over the past three years (Figure 7.2-9).

**Figure P.1-5 Key Supplier Examples**

Key supplier requirements are on-time delivery, competitive pricing, e-procurement, quality of product or service, and customization for ISS needs.

ISS process	Key Supplier	Example of Product
Professional Development	Teachscape True North Logic	Instruction Tracking impact
Hardware	Lenovo	Computers

Construction	Architects	Facility plans
Maintenance	School Dude	Work orders
Transportation	Before You Hire	Drug testing
Finance	Timekeeper	Payroll
Communication	School Wires	Web page
Human Resources	HRMS E Solutions	Personnel Substitutes

**P.1b(4) Key Supplier/Partner/Stakeholder Relationships and Communication Mechanisms**

ISS has established through the two-way communication model (Figure 5.1-1) the key stakeholder groups and their requirements. Two-way communication and relationship mechanisms include face-to-face meetings, electronic methods, and contractual agreements.

**Figure P.1-4 ISS Stakeholder Key Requirements**

Key Requirements	S	P	St	C	B
High Student Performance	X	X	X	X	X
Healthy, Safe, Orderly, and Caring Schools	X	X	X	X	
Quality teachers, administrators, and staff	X	X	X		
Strong Family, Community, and Business Support		X	X		X
Effective and Efficient Operations		X	X	X	X

S-students, P-parents and partners, St-staff, C-community, and B-business

**P.2 Organizational Challenges**

**P.2a(1) Competitive Position**

ISS is one of 115 public school systems in the state. ISS enrolled 20,902 students in 2006-07, which is 71.46% of the K-12 student market in this service area. Mooresville City Schools (5200 students- 17.78 % of the market) is the other public school system in the county. Charter schools (3) served 601 students or 2% of market. Public schools in Iredell County serve over 90% of market as compared to 88% statewide and 85% in comparison districts. ISS has identified 20 school districts in NC for comparison purposes based on demographics and growth characteristics. (see Figure 7.3-5)

**P.2a(2) Principal Success Factors, Changes**

The success of ISS in differentiating itself from the competition now and in the future rests with its ability to raise achievement and close the gaps (RACG 6.1-1) and to have effective and efficient support processes (AEESP 6.1-2) by creating an aligned and integrated approach to management. This approach develops a depth and breadth of continuous improvement capability using PDSA for the entire school system.

Key changes taking place include expanding virtual learning systems and collaboration of key partners and cultivating positive community perception of the school system. The district has developed innovations such as CCTL, virtual enrollment, and VPAC through collaboration with the Chamber of Commerce, Mitchell Community College, and Economic Development, which contribute to achieving progress in high student performance and support the district RACG Model and the AEESP Model.

**P.2a(3) Comparative and Competitive Data Sources**

ISS utilizes the NC Governor’s Report Card, EVAAS, the NC Department of Public Instruction Rankings, the NC Association of County Commissioners Tax and Budget Survey, and the NC ABC’s Rankings for key comparative data with similar and benchmark school systems within the five strategic priorities. National data are derived from Educational Research Service, APQC, and Education Counts published by Education Week. The school system utilizes benchmark data from state and national Baldrige applicants both within and outside of education. The school system compares itself to 20 peer systems from across NC. Although ISS has a comprehensive student and stakeholder (parent, student, faculty, staff) survey process to assess student, parent, faculty and staff satisfaction levels and to provide longitudinal data for internal comparisons, limited opportunities are available to obtain comparative data for satisfaction results and innovative practices.

ISS also obtains comparative data for support services from child care providers/organizations, food service providers/organizations, transportation providers/organizations and Baldrige winners both within and outside of education. ISS has limited opportunities for comparative data for satisfaction results and innovative practices.

**P.2b Strategic Context**

The Board of Education and senior leadership team has identified the following four major strategic challenges in maintaining the school system’s capacity to deal with the identified success factors above and to sustain school system performance:

1. **Education and learning/organizational sustainability.**  
*Improving student achievement.* Given the county’s fast population growth, ISS faces a challenge to close the achievement gap in the growing non-English speaking Hispanic and the economically disadvantaged student segments and meet the requirements mandated by the federal *No Child Left Behind (NCLB)* legislation and the state’s *ABC Plan Performance Standards*. ISS Provides a **strategic advantage** in addressing this challenge through the instructional facilitator model and PLCs that provide on-time professional development and coaching to teachers as part of the ISS model for raising achievement and closing the gap (Figure 6.1-1). Academic achievement is a key component in sustaining our ability to achieve our vision and strategic objectives and meet our key student and stakeholder requirements in the short- and longer-term.
2. **Human resource/organizational sustainability.**  
*Alleviating shortage of highly qualified teachers.* The shortage of highly qualified and certified teachers with the skills, competencies, and capabilities to deliver instructional excellence is a dilemma faced by many districts across the country; it is a challenge shared by ISS. Our **strategic advantage** in dealing with this challenge is in our ability to attract and retain a quality workforce through our mentoring program, competitive local supplement, and sign-on bonuses. ISS enjoys a low teacher turnover rate (10.32%). Without ensuring a

qualified workforce, ISS will be unable to sustain the ISS model for raising achievement and closing the gap.

3. **Operational/organizational sustainability**

***Ensuring cost effective and equitable school facilities.***

The district is faced with two challenges related to ensuring a district-wide level of excellence in school facilities: rapid population growth and aging school buildings. The rapid growth in the county population is stressing the capability of the district to meet capacity requirements in the highest growth areas. ISS also faces the need to renovate or replace aging facilities to ensure equity across the district. Our **strategic advantages** are a predictable funding formula provided by the county commissioners and a growing tax based.

4. **Community-Related**

***Ensuring***

***availability of funding.*** A key strategic challenge and factor in sustaining the operations of the organization is the availability of funding. Sufficient capital resources are required to ensure our capability to meet current and emerging capacity needs not only in terms of needed building construction and renovation, but in terms of funds for day-to-day operations and funds for salary and employee benefits for a growing workforce and retirement benefits for a workforce that is moving towards retirement. In addition to operational funding, the district must be able to agilely respond to un-funded legislative mandates. The district's **strategic advantage** to the funding challenge lies in our commitment to using a systemic planning process and the predictable funding formula supplied by the county commissioners. Short- and longer-term financial and budgetary issues are addressed in the *ISS Strategic Plan* and its attendant action plans including school improvement and departmental plans. As a result of our planning and budget processes, ISS is currently performing in the top 20 school systems in NC academically and spends in the bottom 10 for per pupil operation dollars. A **strategic advantage** enjoyed by ISS is the proximity of our community to the city of Charlotte. The district anticipates continued economic growth and wealth in our county. This provides an advantage in terms of availability of and support for funding to meet current and future capacity needs.

5. **Community-Related**

**Supporting the community to attract and retain existing employers, employees, and students by demonstrating leadership which will result in increased academic performance.**

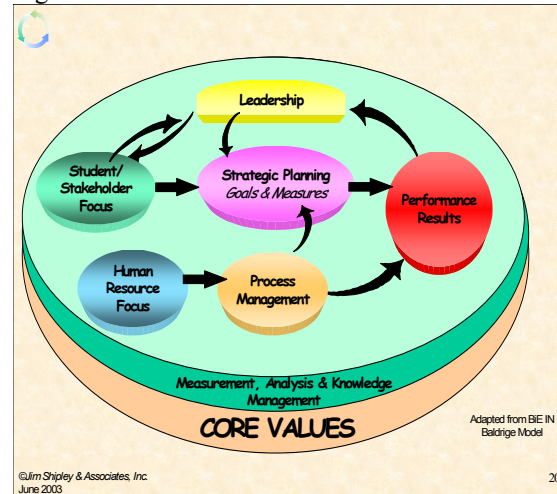
Given the diversity in the community and, especially, the growth in the disadvantaged and English as a second language student segment, the district capabilities to meet the educational and support services needs of this segment are challenged. The strategic advantages include low teacher turnover,

continued economic growth, wealthy community, proximity to Charlotte and a low tax rate. In addition, another of ISS' **strategic advantages** is our Performance Excellence Model to continuously improve our key learning-centered and work processes.

**P.2c Performance Improvement System**

ISS utilizes the Model for Performance Excellence which was adopted by the Board of Education as the foundation of the ISS RACG Model and the AEEP Model. The superintendent brought the Model for Performance Excellence to ISS in 2002 based on his previous work with the Southern Region Educational Board and the SC Total Quality in Education Initiative. The Superintendent's Cabinet meets weekly to guide the system in the implementation of the Strategic Plan. A mid-year and end-of-year review process lead to the identification of key processes that require improvement cycles. ISS has received recognition and feedback through three levels of awards from the NC Awards for Excellence Process, SACS district accreditation, APQC and BNQP, all of which are used to improve the system of systems. ISS was the only education organization to receive a site visit by the BNQP during 2007 award cycle.

Figure P.2-1 ISS Performance Excellence Model



Consistent with our continuous improvement culture, ISS utilizes a systemic and systematic PDSA (as described in 6.0) to improve key processes. The PDSA approach is based on a six step improvement model: (1) validate the need for improvement and (2) clarify purpose, goals and measures (plan); (3) adopt and deploy an approach to continual improvement and (4) translate the approach to aligned action (do); (5) analyze the results (study); and (6) make improvements (act). Schools, departments, and classrooms utilize the PDSA improvement process. PDSAs drive continuous improvement between SWOT analyses. A PDSA in motion may, at any point in time, using the system method through division to cabinet to executive cabinet, call for a reallocation of resources as necessary when urgency of effectiveness requires a turn around time of as little as a week.

Employees are the greatest knowledge assets in achieving organizational learning and improvement. The work of the schools and departments is accomplished through ongoing cross-functional teams called Professional Learning Communities (PLC) as further described in 5.0

The ISS RACG Model is supported through instructional facilitators, predictive assessments, instructional guides, and PLCs and is assessed using the Systems Level Check III and student performance.