

Merrett R. Stierheim, Superintendent of Schools

**SUBJECT: SUPERINTENDENT'S REORGANIZATION AND RESTRUCTURING OF
SELECTED OFFICES WITHIN THE SCHOOL DISTRICT**

1. **APPROVE PROPOSED REORGANIZATION AND
RESTRUCTURING OF SELECTED DISTRICT AND REGION
OFFICES**
2. **DELETE ADMINISTRATIVE POSITIONS**
3. **ESTABLISH AND CLASSIFY ADMINISTRATIVE POSITIONS**
4. **APPOINT AND ASSIGN ADMINISTRATIVE PERSONNEL**
5. **APPROVE LATERAL TRANSFERS OF ADMINISTRATIVE
PERSONNEL**
6. **APPROVE RECLASSIFICATIONS OF ADMINISTRATIVE AND
DCSAA PERSONNEL**
7. **APPROVE CHANGE OF TITLES**

Authorization of the Board is requested to approve the Superintendent's reorganization and restructuring of selected District and region offices. By law, it is within the Superintendent's authority to structure a reorganization involving personnel and offices within the District and then to submit this reorganization and restructuring to the Board. This item is being submitted for School Board approval pursuant to Florida Statutes 1001.49 and 1012.27 and School Board Rule 6Gx13-2C-1.03.

School Board Rule 6Gx13-4A-1.16 and the labor contract with the Dade County Schools Administrators' Association (DCSAA) permit the Superintendent discretion in making recommendations to the Board for direct appointment of administrative and professional and technical personnel when proposing changes in the administrative organization.

The Superintendent's purpose in developing and recommending this reorganization and restructuring Agenda Item is to promote the educational mission of the District, provide cost savings, increase overall efficiency and streamline the administrative organization of the District. The Superintendent has included among the criteria considered in the placement of personnel: capacity to meet the educational needs of the community, efficiency and educational qualifications.

RECOMMENDED: That effective March 13, 2003, or as soon thereafter as can be facilitated, The School Board of Miami-Dade County, Florida:

**REPLACEMENT
A-1**

1. Approve the proposed reorganization and restructuring of selected district and region offices;
2. Delete the following administrative positions:
 - a. District Supervisor, Department of Summer and Extended Year Program, MEP pay grade 21
 - b. Administrative Director, School Reform, MEP pay grade 24
 - c. Administrative Director, Instructional Support, Curriculum Support Services, MEP pay grade 24
 - d. Associate Superintendent of Education, MEP pay grade 26
 - e. Associate Superintendent of School Operations, MEP pay grade 26
 - f. Region Superintendent (6), MEP pay grade 25
 - g. Region Director (24), MEP pay grade 24
 - h. District Supervisor, Schools of Choice, MEP pay grade 21
 - i. Supervisor, Magnet Technology, MEP pay grade 20
 - j. Director, Federal Legislative Programs, MEP pay grade 21
 - k. Assistant Superintendent, Human Resources, MEP pay grade 24
 - l. Executive Director, Wage and Salary Administration, MEP pay grade 22
 - m. Communications Executive Officer, MEP pay grade 25
 - n. Administrative Director, Personnel Administration, MEP pay grade 24
3. Establish and classify the following administrative positions:
 - a. Administrative Director, ESE-Field Services, MEP pay grade 24 (2)
 - b. Assistant Superintendent, ACCESS Center, MEP pay grade 25 (6)
 - c. Associate Superintendent, Instructional Operations, MEP pay grade 26
 - d. Associate Superintendent, Management Operations, MEP pay grade 26
 - e. Associate Superintendent, ACCESS Centers, MEP pay grade 26
 - f. Director Advocacy, ACCESS Center (6), MEP pay grade 24
 - g. Director Business, ACCESS Center (6), MEP pay grade 24

- h. Director Curriculum, ACCESS Center (6), MEP pay grade 24
- i. Executive Director, Schools of Choice (2), MEP pay grade 22
- j. Supervisor, Medicaid Reimbursement Programs, MEP pay grade 21
- k. Assistant Superintendent, Full Service Schools and Attendance Boundary Committee, MEP pay grade 25
- l. Assistant Superintendent, School Choice and Parental Options, MEP pay grade 25
- m. District Director, Assessment and Accountability, Office of Educational Planning, MEP pay grade 23
- n. Administrative Director, Personnel Staffing and Employment, MEP pay grade 24
- o. Assistant Superintendent, Office of Performance Improvement, MEP pay grade 25
- p. Administrative Director, MWBE and Related Services, MEP pay grade 24
- q. District Director, Compensation Administration, MEP pay grade 23
- r. Interim Assistant Superintendent, Facilities Operations, Maintenance and Planning, MEP pay grade 25
- s. Chief Communications Officer, MEP pay grade 26
- t. Administrative Assistant and Legislative Board Liaison, MEP pay grade 22
- u. Interim Executive Director, Support Operations Procurement Management, MEP pay grade 22
Instructional Supervisor, Medicaid Reimbursement Program, MEP pay grade 21

4. Appoint and assign administrative and DCSAA personnel:

- a. Dr. Magaly C. Abrahante, Chief Personnel Officer, MEP pay grade 26, to Assistant Superintendent, Title I Administration, MEP pay grade 25
- b. Ms. Margarita Alemany-Moreno, Region Director, Region II, MEP pay grade 24, to Assistant Superintendent, ACCESS Center 1, MEP pay grade 25
- c. Ms. Bernice T. Ball, District Director, ESE, MEP pay grade 23, to Assistant Superintendent, ESE, Student/Career Services, MEP pay grade 25
- d. Mr. George Balsa, Chief Auditor, Management and Compliance Audits, MEP pay grade 26, to Assistant Superintendent, Office of Performance Improvement, MEP pay grade 25
- e. Dr. Rose Barefield-Cox, Assistant Superintendent,

- Procurement Management, MEP pay grade 25, to Administrative Director, MWBE and Related Services, MEP pay grade 24
- f. Ms. Olivia Bevilacqua, Principal, Redondo Elementary, MEP pay grade 22, to District Director, Management Training, Training and Development, MEP pay grade 23
 - g. Ms. Carolyn Bonner, Region Director, Region Office VI, MEP pay grade 24, to Principal, Ruth Owens Kruse Educational Center, MEP pay grade 22
 - h. Ms. Virginia Bradford, Assistant Superintendent, Office of Professional Standards, MEP pay grade 25, to (Interim) Chief Personnel Officer, MEP pay grade 26
 - i. Ms. Linda Brown, Executive Director, Community Participation, MEP pay grade 22, to District Director, Community and Hospitality Services, MEP pay grade 23
 - j. Ms. Cynthia Clarke, Elementary Principal, Poinciana Park, MEP pay grade 22, to ACCESS Director, Center 5, Business, MEP pay grade 24
 - k. Mr. Eugene Butler, Principal, South Miami Senior, MEP to Executive Director, Office of Professional Standards, MEP
 - l. Mr. Fred Conde, Executive Director, Office of Professional Standards, MEP pay grade 22, to Assistant Principal, West Homestead Elementary, MEP pay grade AP
 - m. Mr. Delio Diaz, Region Superintendent, Region IV, MEP pay grade 25, to Principal Southwood Middle, MEP pay grade 22
 - n. Ms. Gisela Feild, Executive Director, Educational Planning and Quality Enhancement, DCSAA pay grade 47, to District Director, Assessment and Accountability, MEP pay grade 23
 - o. Mr. Lawrence Feldman, Region Director, Region IV, MEP pay grade 24, to Principal, John I. Smith Elementary, MEP pay grade 22
 - p. Mr. Ronald Felton, Assistant Superintendent, ESE, MEP pay grade 25, to Associate Superintendent, Management Operations, MEP pay grade 26
 - q. Mr. Carlos Fernandez, Principal, Biscayne Elementary, MEP pay grade 22, to ACCESS Director, Center 5, Advocacy, MEP pay grade 24
 - r. Mr. Jorge Garcia, Principal, Natural Bridge Elementary, MEP pay grade 22, to ACCESS Director, Center 6, Advocacy, MEP pay grade 24
 - s. Mr. John Gilbert, Region Director, Region I, MEP pay

- grade 24, to Assistant Superintendent, ACCESS Center 5, MEP pay grade 25
- t. Mr. Joseph A. Gomez, District Director, Procurement Management, MEP pay grade 23, to Assistant Superintendent, Procurement Management, MEP pay grade 25
 - u. Mr. Will Gordillo, Principal, Ruth Owens Kruse Center, MEP pay grade 22, to Administrative Director, ESE, Field Services, MEP pay grade 24
 - v. Mr. Charles Hankerson, Principal, North Miami Senior, MEP pay grade 23, to ACCESS Director, Center 1, Advocacy, MEP pay grade 24
 - w. Mr. James Hayes, Administrative Director, Labor Relations, MEP pay grade 24, to District Director, Compensation Administration, MEP pay grade 23
 - x. Ms. Gwendolyn Hines, Region Director, Region V, MEP pay grade 24, to Principal, Poinciana Park Elementary, MEP pay grade 22
 - y. Mr. Ronald Hunter, Principal, William Turner Technical, MEP pay grade 23, to ACCESS Director, Center 2, Advocacy, MEP pay grade 24
 - z. Ms. Sharon Jackson, District Director, Office of Professional Standards, MEP pay grade 23, to Principal, Brentwood Elementary, MEP pay grade 22
 - aa. Mr. Clarence Jones, Region Director, Region V, MEP pay grade 24, to Principal, Natural Bridge Elementary, MEP pay grade 22
 - bb. Mr. Robert Kalinsky, Principal, Wesley Matthews Elementary, MEP pay grade 22, to ACCESS Director, Center 3, Business, MEP pay grade 24
 - cc. Mr. Henry Ferrer, Region Superintendent, Region I, MEP pay grade 25, to ACCESS Director, Center 4, Curriculum, MEP pay grade 24
 - dd. Ms. Alina Diaz, Instructional Supervisor, FDLRSS, MEP pay grade 21, to Executive Director, Schools of Choice, MEP pay grade 22
 - ee. Ms. Joanne Koski, Director, Procurement Management, MEP pay grade 21, to District Director, Procurement Management, MEP pay grade 23
 - ff. Mr. John Lengomin, Region Director, Region III, MEP pay grade 24, to Principal, Wesley Matthews Elementary, MEP pay grade 22
 - gg. Ms. Maria Llerena, Principal, Sunset Elementary, MEP pay grade 22, to ACCESS Director, Center 2, Curriculum, MEP pay grade 24
 - hh. Ms. Ronda Martin, Executive Director, Wage and Salary, MEP pay grade 22, to Administrative Director

- Designate, Compensation Administration, MEP pay grade 24
- ii. Mr. Joseph Mathos, Assistant Superintendent, Adult, Vocational & Alternative Programs, MEP pay grade 25, to Administrative Director, Workforce Development, MEP pay grade 24
 - jj. Ms. Olga Miyar, Region Director, Region I, MEP pay grade 24, to Principal, Biscayne Elementary, MEP pay grade 22
 - kk. Ms. Essie Pace, Region Director, Region III, MEP pay grade 24, to Assistant Superintendent, ACCESS Center 4, MEP pay grade 25
 - ll. Ms. Carol Renick, Administrative Director, Adult, Vocational & Alternative Programs, MEP pay grade 24, to Interim Assistant Superintendent, Adult, Vocational & Alternative Programs Temporary, MEP pay grade 25
 - mm. Ms. Ana Rijo-Conde, Administrative Director, Facilities Planning, MEP pay grade 24, to Interim Assistant Superintendent, Facilities Operations, Maintenance and Planning, MEP pay grade 25
 - nn. Mr. Alberto Rodriguez, Assistant Superintendent, Human Resources and Staff Development, MEP pay grade 25, to Principal, Miami Killian Senior High, MEP pay grade 23
 - oo. Mr. Kenneth Rogers, Region Director, Region VI, MEP pay grade 24, to Principal, William Turner Technical Senior High, MEP pay grade 23
 - pp. Mr. Jorge Sotolongo, Region Director, Region I, MEP pay grade 24, to Principal, Southwest Miami Senior High, MEP pay grade 23
 - qq. Mr. Robert Thomas, Region Director, Region II, MEP pay grade 24, to Principal, Hibiscus Elementary, MEP pay grade 22
 - rr. Mr. Mayco Villafaña, Communications Executive Officer, MEP pay grade 25, to Chief Communications Officer, MEP pay grade 26
 - ss. Mr. Michael Wagner, Region Director, Region V, MEP pay grade 24, to Principal, Sunset Elementary, MEP pay grade 22
 - tt. Ms. Enid Weisman, Region Director, Region II, MEP pay grade 24, to Assistant Superintendent, ACCESS Center 2, MEP pay grade 25
 - uu. Mr. Kenneth Wheeler, Principal, Hibiscus Elementary, MEP pay grade 22, to ACCESS Director, Center 5, Curriculum, MEP pay grade 24
 - vv. Mr. Carnell A. White, Region Director, Region I, MEP pay grade 24, to Principal, North Miami Senior, MEP

- pay grade 23
- ww. Ms. Willa Young, Region Superintendent, Region III, MEP pay grade 25, to Associate Superintendent, ACCESS Centers, MEP pay grade 26
- xx. Mr. Valentin Alvarez, Administrative Assistant to Superintendent, MEP pay grade 20, to Administrative Assistant and Legislative Board Liaison, MEP pay grade 22
- yy. Ms. Marlene Leyte-Vidal, Supervisor, Schools of Choice, MEP pay grade 21, to Assistant Principal, Ada Merritt Elementary, MEP pay grade AP
- zz. Ms. Marie Harrison, Principal, John I. Smith Elementary, MEP pay grade 22, to ACCESS Director, Center 1, Business, MEP pay grade 24
- aaa. Ms. Carmen Marinelli, Principal, Miami Southwest Senior High, MEP pay grade 23, to ACCESS Director, Center 2, Business, MEP pay grade 24
- bbb. Mr. Pierre Rutledge, Director, Federal Legislative Programs, MEP pay grade 21, to District Supervisor, Grants Administration, DCSAA pay grade 45 _____
- ccc. Ms. Estrella Diaz, Supervisor, Community Education, Workforce Development, DCSAA pay grade 44, to Supervisor, After School Care, Workforce Development, MEP pay grade 21
- ddd. Mr. William Scott, Supervisor I, Furniture, Fixtures and Equipment, DCSAA pay grade 43, to Interim Executive Director, Support Operations, Procurement Management, MEP pay grade 22
- eee. Mr. Julio Miranda, District Director, Compliance and Investigative Audits, MEP pay grade 23 to Interim Chief Auditor, MEP pay grade 26

5. Approve the following lateral transfers of administrative personnel:

- a. Ms. Carol Cortes, Region Superintendent Region V, MEP pay grade 25, to Assistant Superintendent, ACCESS Center 3, MEP pay grade 25
- b. Ms. Marjorie Figueira, Administrative Director, Curriculum Instruction, MEP pay grade 24, to ACCESS Director, Center 1, Curriculum, MEP pay grade 24
- c. Ms. Lucy Iturrey-Perez, Principal, Kinloch Park Middle, MEP pay grade 22, to Executive Director, Office of Professional Standards, MEP pay grade 22
- d. Mr. Timothy Dawson, Principal, Miami Killian Senior, MEP pay grade 23, to Principal, Homestead Senior,

- MEP pay grade 23
- e. Ms. Andrienne Leal, Principal, Homestead Senior, MEP pay grade 23, to Principal, Coral Reef Senior, MEP pay grade 23
 - f. Ms. Verdell King, Region Director, Region II, MEP pay grade 24, to ACCESS Director, Center 3, Curriculum, MEP pay grade 24
 - g. Mr. Michael McNeal, Administrative Director, Operations, MEP pay grade 24, to Administrative Director, Attendance Services, MEP pay grade 24
 - h. Ms. Iraida Mendez-Cartaya, Administrative Director, State Legislative and Budget, MEP pay grade 24, to Administrative Director, Budget Planning, MEP pay grade 24
 - i. Ms. Neyda Navarro, Region Director, Region VI, MEP pay grade 24, to ACCESS Director, Center 6, Business, MEP pay grade 24
 - j. Ms. Kamela Patton, Region Director, Region V, MEP pay grade 24, to ACCESS Director, Center 6, Curriculum, MEP pay grade 24
 - k. Ms. Ruby Poitier, Region Director, Region IV, MEP pay grade 24, to Administrative Director, ESE-Field Services, MEP pay grade 24
 - l. Ms. Doris Morgalo, District Supervisor, Title I, Title I Project Administration, MEP pay grade 21, to District Supervisor, Title I, Center 1, MEP pay grade 21
 - m. Mr. Eduardo Rivas, Administrative Director, Educational Planning, MEP pay grade 24, to Administrative Director, Office of Performance Improvement, MEP pay grade 24
 - n. Ms. Myra Silverstein, Region Director, Region III, MEP pay grade 24, to ACCESS Director, Center 4, Advocacy, MEP pay grade 24
 - o. Mr. Craig Sturgeon, Region Superintendent, Region I, MEP pay grade 25, to Assistant Superintendent, Full Service Schools and Attendance Boundary Committee, MEP pay grade 25
 - p. Ms. Aurora Villar, District Supervisor, Title I, Region I, MEP pay grade 21, to District Supervisor, Title I, Title I Project Administration, MEP pay grade 21
 - q. Ms. Geneva Woodard, Administrative Director, School Reform, MEP pay grade 24, to ACCESS Director, Center 3, Advocacy, MEP pay grade 24
 - r. Mr. Freddie Woodson, Region Superintendent, Region VI, MEP pay grade 25, to Assistant Superintendent, ACCESS Center 6, MEP pay grade 25
 - s. Ms. Lourdes Linares, Supervisor, Schools of Choice,

- MEP pay grade 20, to Assistant Principal, Riviera Middle, MEP pay grade AP
 - t. Ms. Jill Boynton, Instructional Supervisor, ESE, MEP pay grade 21, to Supervisor, Medicaid Reimbursement Program, MEP pay grade 21
 - u. Ms. Helen Holt, Administrative Director, Employee Support Services, MEP pay grade 24, to Administrative Director, Personnel Employment and Staffing, MEP pay grade 24
 - v. Mr. Reynaldo Velazquez, Labor Attorney, Labor Relations, Contract, to Labor Attorney and Chief Negotiator, Labor Relations, Contract
 - w. Mr. John Scheuster, Media Relations Coordinator, MEP pay grade 18, to Media Relations, Staff Services, MEP pay grade 18
6. Approve the following reclassifications of administrative and DCSAA personnel:
- a. Mr. Eduardo Barreiro, Instructional Support Specialist, Title I Project Administration, MEP pay grade 20, to Instructional Supervisor, Title I Project Administration, MEP pay grade 21
 - b. Mr. Michael Bell, Administrative Director, Schools of Choice, MEP pay grade 24, to Assistant Superintendent, School Choice and Parental Options, pay grade 25
 - c. Mr. Alberto Carvalho, Administrative Director, Grants Administration and Federal Legislative Affairs, MEP pay grade 24 to Assistant Superintendent, Office of Intergovernmental Affairs and Grants Administration, MEP pay grade 25
 - d. Mr. Jairo Garzon, Specialist Hospitality Services, DCSAA pay grade 43 to Director, Hospitality Services, DCSAA pay grade 45
 - e. Ms. Phyllis Hallberg, District Director, Student Services, MEP pay grade 23, to Administrative Director, Student Services /Career Services, MEP pay grade 24
 - f. Ms. Ana Maria Lopez, District Supervisor, Curriculum Support, MEP pay grade 21 to Executive Director, Curriculum Support, MEP pay grade 22
 - g. Mr. Carlo Rodriguez, District Director, School Choice, MEP pay grade 23 to Administrative Director, School Choice and Parental Options, MEP pay grade 24
 - h. Ms. Beatriz Zarraluqui, Executive Director, Schools of

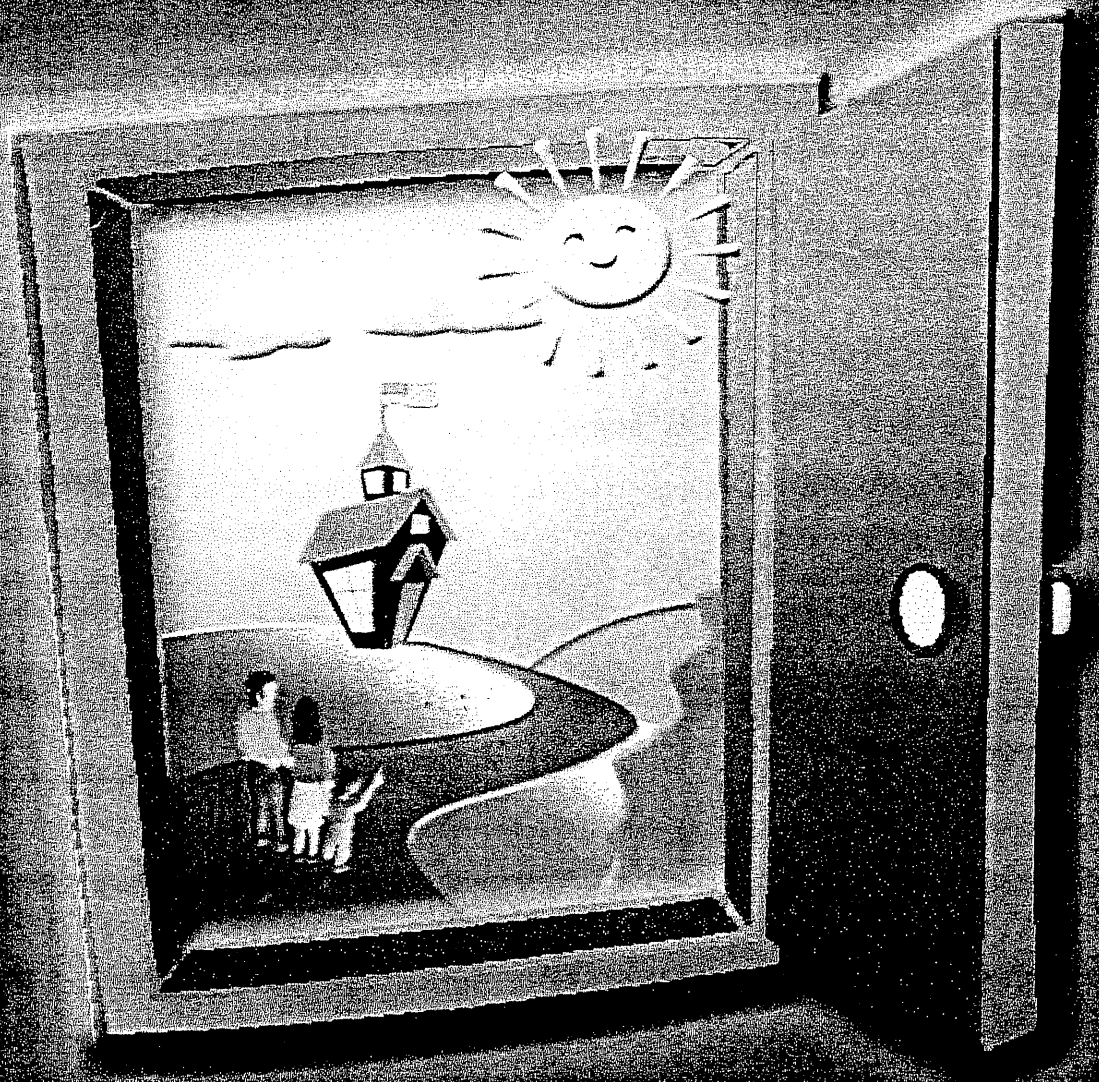
- Choice, MEP pay grade 22, to District Director, School Choice and Parental Options, MEP pay grade 23
- i. Mr. Reinaldo Benitez, Executive Director, Office of Professional Standards, MEP pay grade 22, to District Director, Office of Professional Standards, MEP pay grade 23

7. Approve the following change of titles:

- a. Executive Officers, Title I Administration, MEP pay grade 25, to Assistant Superintendent, Title I Administration
- b. Administrative Director, Employee Support Services, MEP pay grade 24, to Administrative Director, Personnel Support Programs, MEP pay grade 24
- c. Administrative Director, Staff Development, MEP pay grade 24 to Administrative Director, Training and Development, MEP pay grade 24
- d. Administrative Director, Wage and Salary Administration, MEP pay grade 24, to Administrative Director, Compensation Administration, MEP pay grade 24
- e. Administrative Director, State Legislative and Budget Planning, MEP pay grade 24, to Administrative Director, Budget Planning, MEP pay grade 24
- f. Administrative Director, Educational Planning, MEP pay grade 24 to Administrative Director, Office of Performance Improvement, MEP pay grade 24

ACCESS

Area Community Centers for Educational Support Services



Miami-Dade County Public Schools

Merrett R. Stierheim

Superintendent of Schools

March 2003

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Introduction

This report presents the rationale and structure for *Area Community Center for Educational Support Services (ACCESS) Centers*, hereinafter referred to as ACCESS Centers, in the Miami-Dade County Public Schools (MDCPS). Included is the rationale, structure, and responsibilities for the consolidation of specific Student Service Functions within the District.

District Demographics and Population: M-DCPS is the fourth largest school district in the nation serving a diverse population of students with a wide range of abilities, needs and unique challenges. This population consists of approximately 358,000 students; 340 schools; 19,000 teachers; 1,975 administrators; 12,000 volunteers and 2,500 Dade Partners.

District Goals: The District Strategic Plan: 2000-2005 sets forth three goals and attendant enabling objectives to guide District practice. The goals are:

1. School to Career: Students will be prepared for graduation, employment, post-secondary education, and to become responsible citizens and lifelong learners.
2. Effective Learning Environment: Enhance the safety of staff, and increase the quality of the learning environment.
3. Efficient Management Practices: Ensure that schools system operations conform to the highest business and professional standards of effectiveness, ethics, and efficiency.

Current Structure: The Miami-Dade County Public Schools is a decentralized District comprised of six (6) geographic Regions each of which is headed by a Regional Superintendent. Four Region Directors report to each Region Superintendent: Each Director has one of the following spheres of responsibility:

- Personnel
- Business Management
- Instructional Support
- ESE/Federal Projects

Listed below are current Region demographic data:

Regions	Number of Schools				White%	Black%	Hispanics%	Other%	Total
	Elementary	Middle	K-8	Senior					
I	33	9	1	5	4	24	71	1	64,947
II	28	7	0	5	12	56	29	3	53,036
III	34	8	1	5	4	41	54	1	51,431
IV	34	9	1	7	7	31	61	1	54,858
V	39	10	2	5	19	10	67	3	64,484
VI	31	10	1	6	15	24	58	3	68,321
TOTALS	199	53	6	33	10.16%	31%	56.6%	2%	357,077

*Miami-Dade County Public Schools Profile 2001-2002

Rationale for Change: The impetus for change is the need to enhance grassroots communication participation and support from students, parents, and other community members and from the administrative staff while maintaining a focus on the educational mission of the District. This is a major paradigm shift! The delivery of educational services is in the primary position and while issues related to infrastructure are important, they are secondary to education.

In support of this shift, the District has consolidated all school services under the Chief Education Officer (the only Deputy Superintendent) who has responsibility for the delivery of educational services as well as the operation of schools. All else is considered infrastructure, to be valued to the degree that it supports the educational mission of the District.

The 2002 OPPAGA report emphasized the need for the District to reinforce its educational mission in all respects. It follows that restructuring at the community access level will be advantageous both in delivering educational services and in supporting communications that are so necessary in support of the District educational mission.

Proposed Restructuring to ACCESS Centers

Restructuring will be accomplished by establishing ACCESS Centers with the ultimate goal of improving student performance. ACCESS Centers will functionally replace the current Regions. The current assignment of Feeder Patterns remains the same. ACCESS Centers will support a cluster of functions represented by the first three letters of the alphabet.

- A represents student Advocacy, Access, and Achievement
- B represents Business
- C represents Curriculum

Each of these functions will be assigned to a Center Director, all three of whom will report to an Assistant Superintendent, ACCESS Center. Responsibilities will be assigned as follows:

Advocacy Director

School Board Rule 6Gx13- 1B-1.011, Parental Involvement – A Home School Partnership, states in part, "... two factors are necessary to improve learning: a sound instructional program, and consistent involvement of parents and other influential adults." The Advocacy Director will be responsible for student and family advocacy implementation with elementary, middle, and senior high schools, as well as with community schools.

The Advocacy Director will implement District policy by enabling easy access to information and services which are essential in fostering communication with those we serve. Additionally, the Advocacy Director will work with Principals to promote and recognize excellence based upon leadership principles and client satisfaction. Tied most closely to District Goal 2, Effective Learning Environment, and as means of achieving Goal 1, the Advocacy function will include:

- Mediating solutions to issues involving the student, home, and school
- Addressing individual student educational need
- Providing information about District programs and services for students
- Clarifying School Board Rules and procedures for students, parents, and other community members
- Providing answers to student and community questions regarding Civil Rights laws
- Serving as a liaison with PTA/PTSA and EESAC
- Responding to parent concerns not resolved at the school level
- Monitoring a program to reduce staff absenteeism
- Encouraging business/school partnerships
- Evaluating principals, and reviewing the evaluations of assistant principals, whose schools are within the authority of the ACCESS Center

Business Director

The responsibilities of the Business Director incorporate both economic and human resources. Economic resources include, but are not limited to, budget allocations and contracts that pertain to the operation of schools for the benefit of students. Human resources include the myriad of personnel issues intrinsic to maintaining a top quality workforce dedicated to the education and safety of students. No fewer than 173 School Board Rules govern the combined areas of Business (economic resources) and Personnel (human resources) – not a surprising number for one of the largest employers in the State of Florida.

The Business Director will direct, support, supervise, and evaluate principals in elementary, middle, and senior high schools, as well as in community schools, in business matters. This Director will assist principals with school budgets, physical plant operations, capital improvement projects, and personnel.

Tied most closely to District Goal 3, Efficient Management Practices, the Business function will include:

- Assisting the District in providing adequate staffing allocations for schools, including allocations for ESE and LEP
- Securing adequate support services for schools from departments involving physical plant, transportation, food service, maintenance, budget, internal accounting and other offices when appropriate
- Monitoring the interpretation and implementation of negotiated contracts, Board Policies, and other legal matters
- Developing and implementing a plan for maintenance and effective operation of schools within the authority of the ACCESS Center
- Monitoring the safety and security of students enrolled in schools within the authority of the ACCESS Center
- Assuring that required reports, e.g., FTE, Title I, School Performance Excellence Plan are prepared and submitted
- Deploying school based staff, e.g., security officers and/or custodians, in emergency situations

- Securing adequate services from the newly centralized infrastructure functions to support the growth and maintenance of school sites
- Overseeing the implementation of School Board Rules pertaining to both Business and Personnel as they relate to school sites.
- Monitoring all performance and investigative personnel issues within the Feeder Patterns assigned to the ACCESS Center
- Conducting monthly meetings with the Office of Professional Standards, School Police, and the Employee Assistance program to assist in the management of personnel issues
- Making recommendations for appropriate disciplinary action for employees
- Evaluating principals, and reviewing the evaluations of assistant principals, whose schools are within the authority of the ACCESS Center for business related performance

Curriculum Director

The responsibilities of the Curriculum Director go to the heart of the District's mission. Supported by 67 School Board Rules governing Elementary and Secondary Education, this function is critical for the ACCESS Centers. The Curriculum Director will have line authority for curriculum implementation at all schools within the authority of the ACCESS Center and will formally identify the educational needs of Feeder Patterns. Additionally, this Director will support, monitor, and supervise instructional programs and resources in elementary, middle, and senior high schools as well as in community schools within the purview of the ACCESS Center.

Tied primarily to District Goal 1, School to Career, the Curriculum function will include:

- Directing and monitoring curriculum implementation at all schools within the authority of the ACCESS Center
- Monitoring, supporting, and assisting Feeder Patterns with instructional programs and resources
- Monitoring effective and efficient functioning of all instructional programs and resources, including ESE and LEP, to ensure student performance improvement
- Analyzing and acting upon programmatic data, e.g., Exceptional Student Education, student achievement, and budget, as supplied by the Office of Informational Technology Services (ITS)
- Facilitating Feeder Pattern Councils within the authority of the ACCESS Center
- Coordinating principal's meetings and inservice programs to directly support the educational mission of the District
- Assisting schools in the preparation of required reports, e.g., the School Performance Excellence Plan
- Evaluating principals, and reviewing the evaluations of assistant principals, whose schools are within the authority of the ACCESS Center

Assistant Superintendent, ACCESS Center

The Assistant Superintendent, ACCESS Center will administer and manage all advocacy, business, and curriculum functions in the ACCESS Center. Duties will include, but not be limited to, the following:

- Monitoring the effective and efficient functioning of all instructional and resource programs within the assigned ACCESS Center
- Assuring that each school within the authority of the ACCESS Center implements and maintains appropriate educational programs to address improvement of student performance
- Implementing and monitoring programs and resources to provide guidance in the resolution of problems such as grades, course credit, grade placement, registration, and legal compliance issues
- Monitoring and providing for the safety and security of students enrolled in schools within the authority of the ACCESS Center
- Regulating educational functions within the ACCESS Center and through lead principals and principals
- Collaborating in the assignment of the Feeder Patterns within the authority of the ACCESS Center
- Recommending the appointment of a lead principal for each Feeder Pattern within the authority of the ACCESS Center
- Implementing and coordinating ACCESS Center and school level planning in relation to District-wide planning
- Providing assistance in developing a plan for security, maintenance, and effective operation of all school facilities within the authority of the ACCESS Center
- Demonstrating accountability and quality control procedures in all operations
- Providing leadership in initiating and maintaining systematic staff revitalization activities for all levels of staff
- Maintaining the ACCESS Center and providing leadership and direction to its staff
- Directing the development of and controlling the use of ACCESS Center funds
- Implementing sound management procedures to ensure that each employee working at locations within the authority of the ACCESS Center performs at the required expectancy level
- Demonstrating managerial proficiency in planning, organizing, and directing the attainment of the District Goals
- Supervising and evaluating ACCESS Center Directors as well as lead principals

Proposed Restructuring to Centralize Specific Student Services Functions

In the report by OPPAGA (April 2002) it was noted that "despite the many good features of the District's Exceptional Student Education (ESE) program, and the fact that ESE students are receiving excellent services in many schools, a number of serious shortcomings exist which, if not addressed, will have grave implications." (*OPPAGA Report, p. 5-26*) Areas of concern in the OPPAGA report were:

- Managing the referral, evaluation, and placement process;
- Ensuring students are served in an inclusionary setting; and
- Managing student behavior

The centralization of specific student service functions directly related to the referral and placement process will assist the district in reducing the timelines for the evaluation process, reducing inappropriate referrals, and increasing services to ESE students in inclusionary

settings; preferably in their home schools. The student services functions being recommended for centralization are:

- School psychologists
- School social workers
- Staffing specialists

Current Allocations

Currently, the allocations for psychologists, social workers and staffing specialists are made by the Budget office based on formulas driven by the unweighted FTE in each Region. These allocations are then provided to each Regional office where those personnel are housed and receive supervision and direction. As shifts occur year to year in FTE by Region, the distribution of personnel in these categories may shift. Unweighted FTE may not always be the best measure of needs by a Region since referrals for evaluation are linked to a number of factors including student performance. There are also variations among the six Regions in the deployment and work assignments of these personnel; particularly social workers. The OPPAGA report specifically singles out the role of social workers for review because of job assignments that may be better handled by other personnel (*OPPAGA Report, p. 5-69*)

Rationale for Centralization

The district has been involved in an effort to reduce the number of referrals for evaluations, improve the timeliness of the evaluation process, and focus the ultimate ESE placement decisions on serving students in the least restrictive environment in the student's home school, or as close to the home school as possible. The centralization of the aforementioned student service functions will greatly assist in this regard for the following reasons:

- Centralized services will allow for deployment of staff to schools/ACCESS offices based on district level data (monitored monthly) indicating need.
- Staff will physically be staffed in ACCESS offices and/or schools.
- Centralized services will allow for District-wide utilization/deployment of staff with specific knowledge, skills or expertise (e.g., bilingual psychologists, neuropsychologists, autism specialists, etc.)
- Focus on social workers and other student service providers to providing direct services to schools and students rather than functions that could be reassigned to clerical or other staff (address verification, student transfers) (*see OPPAGA Action Plan 5-10*)
- Focus on providing ESE staffing function at the home school (combining the efforts of staffing specialists with that of ESE Program Specialists).
- Centralized management of the referral process including data management and evaluation procedures.
- Staffing of ESE students – particularly in low incidence categories (e.g., autism, deaf, severely emotionally disturbed) - across centers would be expedited.
- Centralized student services staff in these categories can be deployed more readily to assist in districtwide initiatives aimed at compliance with OPPAGA, FDOE and USDOE mandates relative to inclusion and disproportionality.

Timeline

With Board approval of the Superintendent's recommendations, implementation of the administrative restructuring plan will begin on March 13, 2003. Adherence to this timeline is of utmost importance in order to ensure that the affected personnel can familiarize themselves with the new management responsibilities thus minimizing the impact that the DROP program will have on the District.

The School Board of Miami-Dade County, Florida adheres to a policy of nondiscrimination in employment and educational programs/activities and strives affirmatively to provide equal opportunity for all as required by:

Title VI of the Civil Rights Act of 1964 - prohibits discrimination on the basis of race, color, religion, or national origin.

Title VII of the Civil Rights Act of 1964, as amended - prohibits discrimination in employment on the basis of race, color, religion, gender, or national origin.

Title IX of the Education Amendments of 1972 - prohibits discrimination on the basis of gender.

Age Discrimination in Employment Act of 1967 (ADEA), as amended - prohibits discrimination on the basis of age with respect to individuals who are at least 40.

The Equal Pay Act of 1963, as amended - prohibits sex discrimination in payment of wages to women and men performing substantially equal work in the same establishment.

Section 504 of the Rehabilitation Act of 1973 - prohibits discrimination against the disabled.

Americans with Disabilities Act of 1990 (ADA) - prohibits discrimination against individuals with disabilities in employment, public service, public accommodations, and telecommunications.

The Family and Medical Leave Act of 1993 (FMLA) - requires covered employers to provide up to 12 weeks of unpaid, job-protected leave to eligible employees for certain family and medical reasons.

The Pregnancy Discrimination Act of 1978, prohibits discrimination in employment on the basis of pregnancy, childbirth, or related medical conditions.

Florida Educational Equity Act (FEEA) - prohibits discrimination on the basis of race, gender, national origin, marital status, or handicap against a student or employee.

Florida Civil Rights Act of 1992 - secures for all individuals within the state freedom from discrimination because of race, color, religion, sex, national origin, age, handicap, or marital status.

School Board Rules 6Gx13-4A-1.01, 6Gx13-4A-1.32, and 6Gx13-5D-1.10 - prohibit harassment and/or discrimination against a student or an employee on the basis of gender, race, color, religion, ethnic or national origin, political beliefs, marital status, age, sexual orientation, social and family background, linguistic preference, pregnancy, or disability.

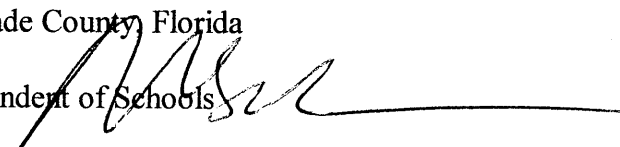
Veterans are provided re-employment rights in accordance with P.L. 93-508 (Federal Law) and Section 295.07 (Florida Statutes), which stipulate categorical preferences for employment.

REVISED 8/1/01

MEMORANDUM

March 11, 2003

TO: Honorable Chair and Members of
The School Board of Miami-Dade County, Florida

FROM: Merrett R. Stierheim, Superintendent of Schools 

SUBJECT: **REORGANIZATION (ASSOCIATED WITH AGENDA ITEM A-1, BOARD MEETING OF MARCH 12, 2003)**

Just over a year ago, I announced my first reorganization of the District. You were presented with an organizational model focused on the District's educational mission uniting education and curriculum with the operation of our schools. That model was reflected in the organizational chart approved by the Board at its February 2002 meeting. It emphasized the sole mission of the District, which is education, educational accountability and the delivery of educational services. Everything else on that chart constitutes the infrastructure supporting the educational mission.

One year later, my commitment to this model has deepened and sharpened. Everything about the School Board of Miami-Dade and this District must always be about the delivery of educational services to a large and diverse student population reflective of this community and its needs. We must be competitive, accessible, innovative and daring. The reorganization that I am recommending in Agenda Item A-1 is designed to promote greater decentralization reaching out for community involvement at the grass roots level, particularly in the areas of parent and student advocacy. At the same time, this reorganization is intended, with the continued budgetary shortfalls, to further increase the effectiveness and efficiency of all District operations. I believe that this reorganization will enhance the credibility of the District in the general community and I remain steadfastly committed to the Board's desire for reform.

In the area of education, I am proud to recommend to you an individual who I know will serve as this District's outstanding educational leader, Ms. Mercedes Toural. This past week a search committee of nine individuals consisting of outstanding leaders in the areas of higher education, business, charter schools, parents, administrators and teachers interviewed five applicants provided to the District by Performance Inc., the management search firm the Board selected to conduct a national search for the position of Chief Education Officer and Deputy Superintendent of Schools. When the committee met with me this past week, they made one comment in total uniformity – that all five candidates were outstanding and *could* do the job. They also told me they were impressed with the model the board adopted which united education and operations into one position of Chief Education Officer and Deputy Superintendent of Schools. While individual committee members had different observations about various candidates, the one candidate that received constant support was Ms. Toural. I believe strongly that no one should question the value of the national search. We had outstanding candidates and it was a difficult decision. Having worked closely with Mercedes over the past sixteen months,

I have complete confidence that she is the right person for this critically important position.

The culmination of the search and the timing of this appointment provide an appropriate opportunity to recommend a second reorganization of the administrative management of this District. I believe this will demonstrate the Board's and my commitment to this community, our principals and teachers that we are all about education. It is essential that we encourage parents, students and our partners in the business community to become more involved with our schools. We want all our constituents to not only feel welcome, but to be encouraged to participate and become involved. In recognition of this, I recommend strengthening the District's geographic regional model through a new concept. Instead of Regions, they would be identified as Area Community Centers for Educational Support Services, in short, ACCESS Centers. Each ACCESS Center will be led by an Assistant Superintendent supported by three Center Directors. The mission of each Center will be to promote and support student Achievement, Access and Advocacy; Business; and Curriculum - - or the A, B, C's of the Miami-Dade School District.

The ACCESS Centers, which will have the same numerical identification that regions currently have, will be responsive to the Board's goals for parental involvement and student advocacy. They will also encourage partnerships with our business community to deliver a quality educational product. The three center directors, one each for advocacy, business, and curriculum, comprise one less administrator and support staff at each center which will generate needed cost savings. The Centers will report through an Associate Superintendent to Ms. Toural. Under separate cover, the Board will be provided a report in more detail on the ACCESS Centers and the services they will provide to the various stakeholders they serve.

The balance of the reorganization deals with providing greater accountability and reform within the infrastructure supporting the educational mission of the District. They are in the four areas reflected in the February 2002 organizational chart adopted by the Board and attached to this memorandum for the Board's review. The four areas are: Accountability and Compliance (Chief of Staff); Personnel; Finance; and Business Operations. The recommended reorganization realigns and streamlines certain District functions to continue the Board's mandate of fiscal and educational reforms. With Ms. Toural's able leadership of the educational mission of the District, I will focus on the legislative session, our financial capacities and improving the District's business infrastructure, especially in the areas of facilities construction and maintenance. On this Board agenda, there is an item recommending the Board's authorization to explore management firms to oversee the facilities construction program for the District. Similarly, there is an item for Wednesday's meeting recommending that the Board enter into an agreement with UNICCO for maintenance management and consultant services. I am confident that we are on the right track.

Also recommended is a conference session in early April for the Board to discuss several matters including facilities construction, deferred maintenance and our recommendations from the recently held construction retreat. I have also begun the process of recruiting an individual whose talents and strengths are concentrated in facilities construction to oversee the District's building and maintenance programs. For now, I am recommending that Ms. Ana Rijo-Conde, on an interim basis, supervise

and manage facilities planning, operations, and maintenance. Ms. Rijo-Conde has demonstrated her strong leadership in land acquisition and management. During this transition, I will be personally involved in recruiting a proven professional and seeking a private construction management company to assist the District in its school construction program.

In that regard, Mr. Larry Staneart has informed me that he will be leaving the District, effective at the end of April because of personal opportunities that have presented themselves. Until he leaves Mr. Staneart will work with and assist Ms. Rijo-Conde to ensure continuity while we search for an experienced construction executive. For the time being, Transportation and Food Services will report to Chief Financial Officer, George Burgess.

Other organizational changes will be presented to the Board at this Wednesday's meeting. I feel comfortable that each of these will strengthen our internal organization and conform with our commitment to education while streamlining and reducing costs. The highlights of these changes are reflected on the revised organizational chart attached to this memorandum. In the personnel area, Dr. Magaly Abrahamte is returning to the education side of the District and will transition and lead our Title I Administration program when Ms. Maybelline Truesdell retires this June. I am grateful to Dr. Abrahamte for her hard work and dedication in Personnel over the past year.

I am pleased to have selected, with the assistance of the Council for Great City Schools, Ms. Marjorie Adler, former head of Human Resources for the Philadelphia School District as our new Chief Personnel Officer. A copy of Ms. Adler's resume is attached for the Board's review. Ms. Adler will be moving with her family from Philadelphia and will permanently join us in approximately six to eight weeks. In the meantime, she will be here on a part time basis working with personnel staff. Ms. Virginia Bradford will serve as the Interim Chief Personnel Officer for the District while continuing to serve as head of the Office of Professional Standards. After Ms. Adler joins us full time, Ms. Bradford will continue to provide assistance and expertise to the Personnel Office.

Also, after Ms. Adler joins us and becomes familiar with the District's personnel functions, Labor Relations (Collective Bargaining) will be transferred to Personnel and report to her. Ms. Adler was the chief bargaining agent for the Philadelphia School District while serving as Human Resource Director. Mr. James Hayes will return to the Personnel Office in the compensation area and will assist in contract negotiations while Mr. Rey Velazquez assumes the additional duties in negotiations while still serving as the District's Labor Counsel.

Mr. Mayco Villafaña and Mr. Valentin Alvarez will both assume added responsibilities for me and the District. Mr. Villafaña will serve as Chief Communications Officer with the Office of Information Technology reporting to him along with two additional public relations, media and marketing assignments to launch our new ACCESS Center initiatives and marketing strategies. Mr. Alvarez will assume additional Board liaison responsibilities in the area of the District's legislative programs and initiatives. A new department, Intergovernmental Affairs and Grants headed by Mr. Alberto Carvalho will combine federal and state grants with intergovernmental affairs including the District's legislative lobbying efforts.

Mr. George Balsa is being transferred to head up the Office of Performance Improvement (OPI) and will report to Chief Financial Officer George Burgess. Dr. Eduardo Rivas will assist Mr. Balsa. OPI's first assignment will be a comprehensive, in depth, operational review, including position audits of Adult/Vocational Alternative and Community Schools. I am convinced that there are significant cost savings and improved educational opportunities for our community that can be realized through this review. Ms. Carol Renick will serve as Interim Assistant Superintendent of that office. Mr. Mathos has been assigned as an Administrator Director within that office.

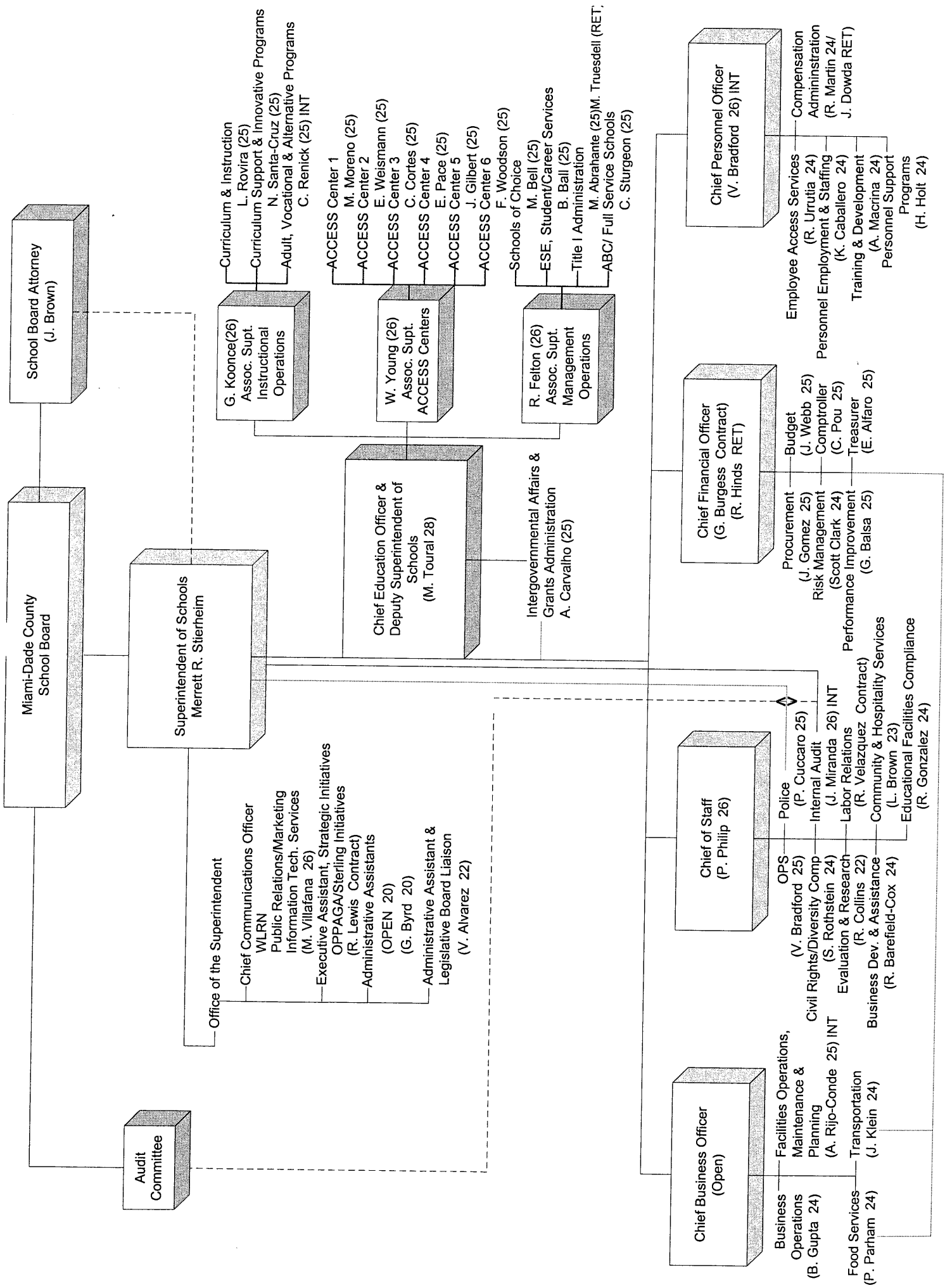
Mr. Julio Miranda will serve as Interim Chief Auditor while that position is advertised. A member of the Audit Committee will be designated to participate in the selection for the Chief Auditor, and prior to selection the Audit Committee will be requested to review and provide its recommendations. In regard to the Audit Committee, it is recommended that the Board consider promulgating a Board rule that would provide for the periodic rotation of the Chair among its private sector members. The District has benefitted greatly from the long term dedication of the Audit Committee Chair; however, the periodic rotation of the Chair of a standing committee as important as the Audit Committee is to the school district is appropriate and desirable for instilling public confidence.

Mr. Joseph Gomez will become Assistant Superintendent, Procurement Management Services. Ms. Rose Barefield-Cox is being transferred to head the Office of Business Development and Assistance with the added responsibility of administering debarment procedures under the new Board rule. The Procurement Department will be reorganized into two divisions: a Procurement/Agenda Preparation Division and a Support Operations Division. Ms. Joanne Koski will supervise procurement and Mr. Lee Scott will serve on an interim basis supervising Support Operations while that position is posted.

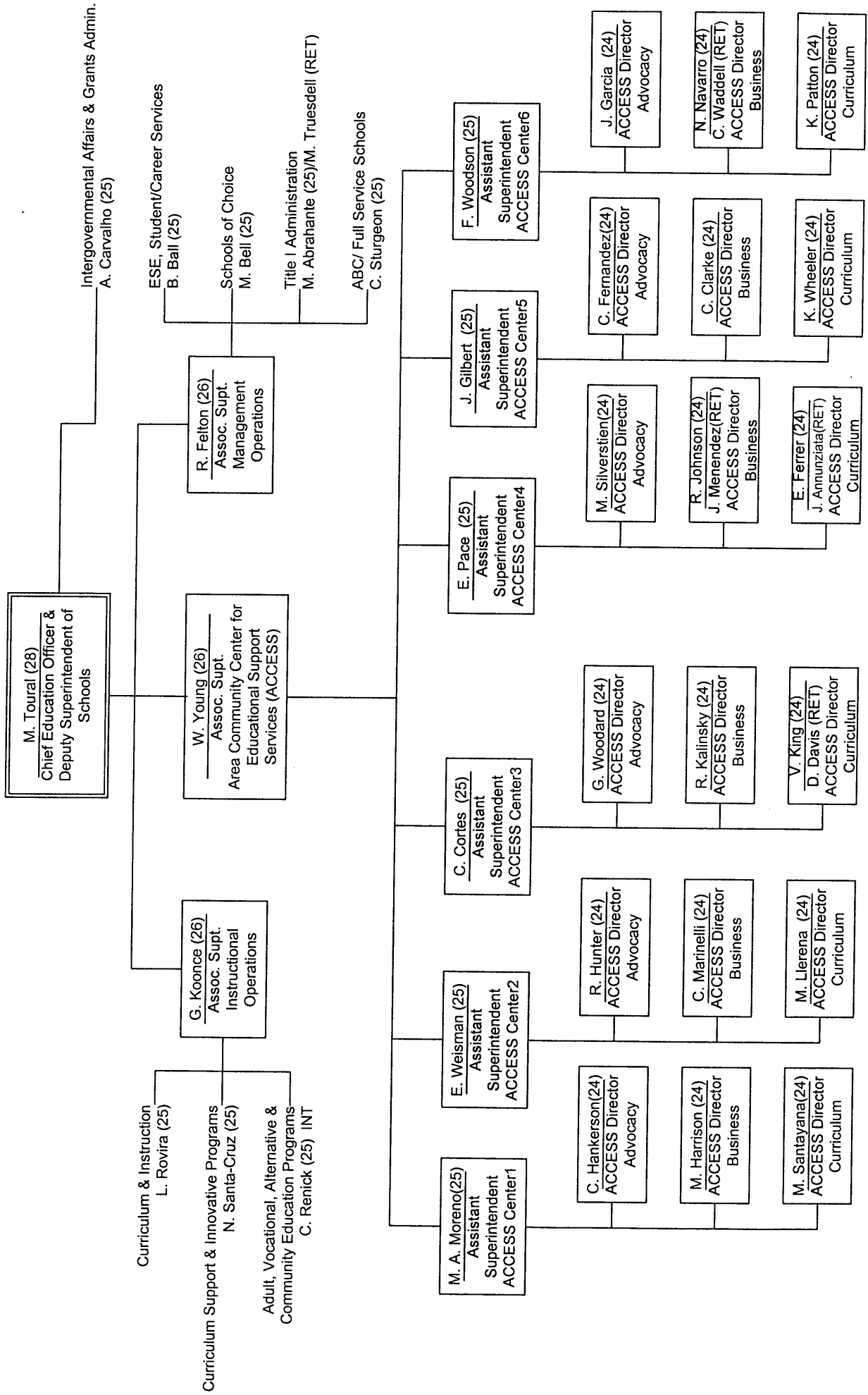
Other details of my recommended reorganization are set forth in Agenda Item A-1, copy attached. In submitting this agenda item and my recommended reorganization, I want to acknowledge my gratitude to each of you, the Honorable Chair and Board members, for your continued support. Reform efforts are never easy and your patience and support has been very much appreciated. Without a doubt serving as your Superintendent has been the most challenging assignment in my professional career. It has also been rewarding, which is reaffirmed every time I am in a classroom with our students, and I am once again powerfully reminded of the importance of this District's educational mission.

Public education nationwide and particularly in Florida faces significant challenges in meeting the educational needs of children. This school district and our community particularly face enormous challenges. I recognize that too frequently the Board is criticized for the failings of staff and I have tried to step in front of unwarranted criticism. We must all accept responsibility for our shortcomings. With your continued support, courage and leadership, I reaffirm my commitment for positive change, along with fiscal, and most importantly, educational accountability.

M2054
Attachments



Chief Education Officer, Deputy Superintendent of Schools



MARJORIE H. ADLER
1901 Walnut Street #2102 Philadelphia, PA 19103
Home: (215) 563-3061 E-mail: mhadler@comcast.net

SUMMARY

A skilled Human Resource professional with background in the private and public sector. Have managed both line and staff organizations. Most recent five-year focus has been on labor relations and recruitment strategies. Have the experience and ability to manage a wide variety of Human Resource functions and to consult directly with line management in issues to improve personal and organization performance. Have expertise in:

- Organization Development and Succession
- Organization Design and Effectiveness
- Management Development and Training
- Strategic Business Planning
- Human Resource Planning
- Employee/Labor Relations
- Labor Negotiations / Contract Administration
- EEO and Affirmative Action
- Health, Safety and Environmental
- Compensation and Benefits

PROFESSIONAL EXPERIENCE

SCHOOL DISTRICT OF PHILADELPHIA, Philadelphia, PA

(1997-2002)

Executive Director, Human Resources

Managed full range of human resources function for the District, including employment, recruitment, testing, certification, selection, placement, benefits, compensation, staff and labor relations, grievance and dispute resolution, and employee health services. Directed a department of 125 employees, including 50 professionals. Served as member of the Superintendent's Executive Committee and Cabinet. Chief labor negotiator and oversee administration of five labor agreements representing 98% of the District workforce. Provided human resources support to instructional support functions. Oversee employment of more than 12,000 teachers and 260 principals.

Selected Accomplishments:

- Negotiated landmark reform contract with Philadelphia Federation of Teachers.
- Directed re-engineering process within Human Resources.
- Designed and co-led performance appraisal process for principals and senior management.
- Responsible for enhanced recruitment strategies and materials, resulting in a 400% reduction in teacher vacancies.
- Designed accountability provisions in labor contracts in facilities, food services and transportation.
- Implemented reorganization in central and field office administration.

ROY F. WESTON, INC., West Chester, PA

(1990-1997)

Vice President, Organization Development

Managed human resource consulting functions including succession planning, organizational development, team building, management development, training, diversity, employee relations, executive and professional recruiting and employment. Managed a department of 6 professionals. Consulted to Executive Management on all organization development, design and effectiveness issues. Implemented organization strategies consulting directly with line management nationwide. Designed and facilitated senior management meetings and conferences.

Selected Accomplishments:

- Designed and implemented a highly effective Executive Succession Process.
- Developed a curriculum for management training.
- Introduced organization development and effectiveness concepts.
- Introduced professional assessment processes and executive coaching to the organization.
- Designed and implemented a company-wide client satisfaction and quality improvement program.

CITY OF PHILADELPHIA, Philadelphia, PA

(1988-1990)

Deputy Mayor, Operations

Appointed as one of two Deputy Mayors to serve in Mayor W. Wilson Goode's second administration. Responsible for managing projects including organization effectiveness, teambuilding, labor relations, and consulting to the Mayor on management and productivity issues.

Selected Accomplishments:

- Conceived and planned the implementation of the Center City District concept.
- Selected to lead the project to build the City's first Resource Recovery Facility.
- Initiated streamlining of the City's construction contract document.

SUNOCO, Philadelphia, PA

(1975-1988)

Human Resources Manager, Fuels Division, Philadelphia PA (1984-1988)

Consulted to line management on a full range of human resource services in over fifty locations in the U.S. and Puerto Rico. Managed three professionals and provided one-on-one human resources consulting expertise to fifteen home office executives.

Selected Accomplishments:

- Appointed acting Director, Chemicals Marketing (1985).
- Led the effort for consistency of policies and procedures across the organization.
- Designed and managed the reorganization of the worldwide commodities Trading Company.
- Appointed Vice Chair of the committee on succession planning and management development.
- Provided staff guidance to labor negotiations, gaining major contract concessions and important expense savings without a work stoppage.

Manager, Human Resources & Plant Services, Marcus Hook, PA (1980-1984)

Responsible for managing a department of over 75 employees providing a full range of Human Resource and Risk Management services including labor relations, safety, security, employee relations, public relations, management development and training, compensation, payroll and benefits, retiree relations and industrial hygiene.

Selected Accomplishments:

- Appointed Management spokesperson for 1982 and 1984 labor contract negotiations between the refinery and the Oil, Chemical, and Atomic Workers (OCAW). Obtained a successful, early contract settlement in 1982 and managed through a seventeen-week strike in 1984, obtaining major economic and work rule concessions.
- Given a six-month temporary assignment at Corporate Headquarters to redesign the Finance Department and create and implement a downsizing plan.
- Appointed to the task force to design the Sun Company 401K plan.

Manager, Refinery Materials Management, Marcus Hook, PA (1977-1980)

Managed a department of 37 employees in the procurement, control, storage, and distribution of \$90 million of spare parts and equipment (200,000 bbls per day refinery).

Selected Accomplishment:

- Initiated automation of the company-wide Procurement and Tracking Process.

Planning and Development Associate, Philadelphia, PA (1975-1977)

Performed a wide range of strategic planning and business development responsibilities.

EDUCATION

MA Economics, University of Pennsylvania

AB Cum Laude with honors in Economics, Bryn Mawr College