

Summative Evaluation
Director, Metro Nashville Public Schools

Respondents

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- 1.2 School Climate and Culture

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Section 1. Our Students

1.1 Academics

1.1 The Director is ...	Count					Total	Avg. Rating (5-pt. scale)
	Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations	Exceptional		
Ensuring that all students are achieving academic growth in reading and math.	1		3	5		9	3.3
Ensuring that Exceptional Education students are making progress toward proficiency in reading and math.	1	1	7			9	2.7
Ensuring that English Learner students are making progress toward language development.	1		7	1		9	2.9
Ensuring that MNPS is closing achievement gaps among African-American students and other students of color.	1	1	7			9	2.7
Ensuring that a higher percentage of students are meeting college-ready benchmarks.	1	1	6	1		9	2.8
Ensuring that a higher percentage of students are completing at least one advanced academic course (e.g. Advanced Placement, Cambridge, International Baccalaureate).		1	2	6		9	3.6
Ensuring that a higher percentage of students are graduating.	2	1	6			9	2.4
Ensuring that a higher percentage of students are obtaining industry certifications.	1		1	2	5	9	4.1
Ensuring that MNPS is expanding pre-kindergarten and early childhood education offerings, resources permitting.	2		5	2		9	2.8
Ensuring that a higher percentage of third-graders are reading at grade level.	1	1	3	4		9	3.1
Ensuring that a higher percentage of students are participating in Advanced Placement exams.		1	1	1	6	9	4.3

Section 1. Our Students

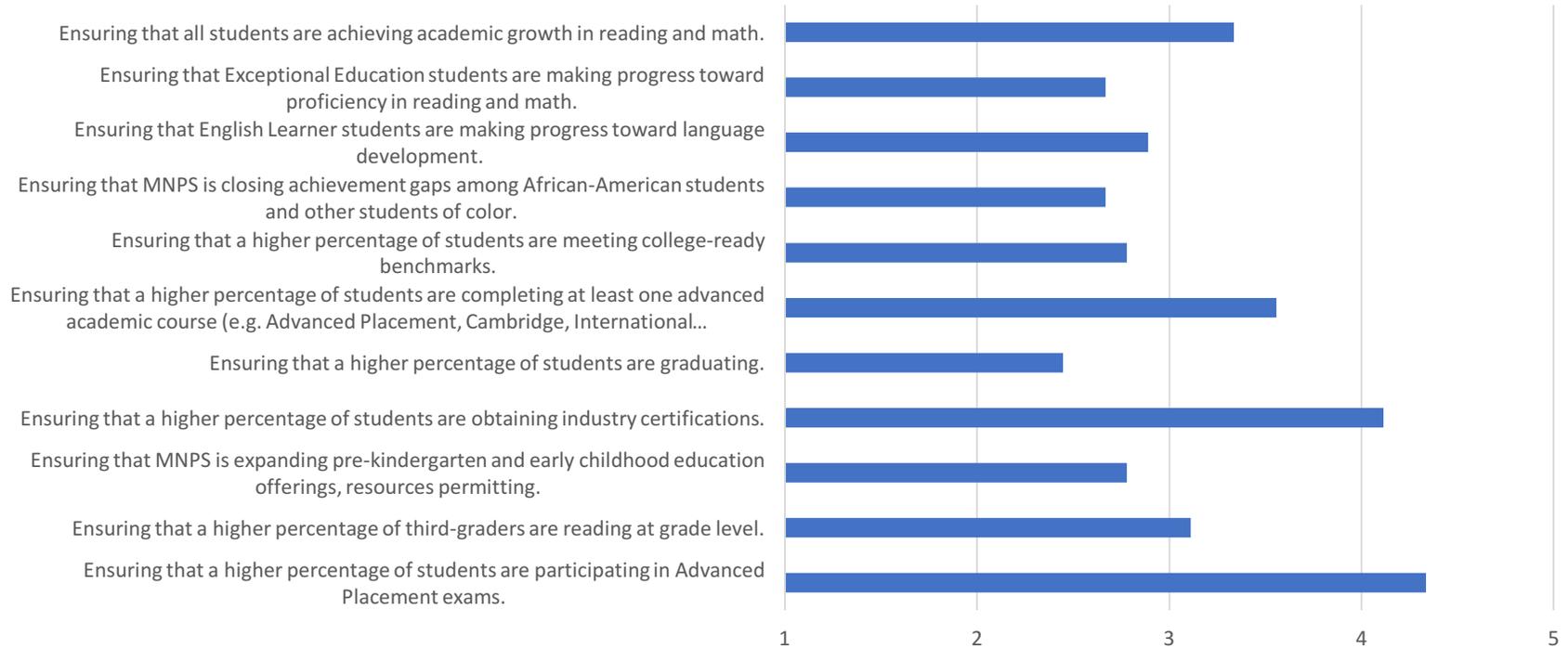
1.1 Academics

1.1 The Director is ...	Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations	Exceptional	Total
Ensuring that all students are achieving academic growth in reading and math.	11%		33%	56%		100%
Ensuring that Exceptional Education students are making progress toward proficiency in reading and math.	11%	11%	78%			100%
Ensuring that English Learner students are making progress toward language development.	11%		78%	11%		100%
Ensuring that MNPS is closing achievement gaps among African-American students and other students of color.	11%	11%	78%			100%
Ensuring that a higher percentage of students are meeting college-ready benchmarks.	11%	11%	67%	11%		100%
Ensuring that a higher percentage of students are completing at least one advanced academic course (e.g. Advanced Placement, Cambridge, International Baccalaureate).		11%	22%	67%		100%
Ensuring that a higher percentage of students are graduating.	22%	11%	67%			100%
Ensuring that a higher percentage of students are obtaining industry certifications.	11%		11%	22%	56%	100%
Ensuring that MNPS is expanding pre-kindergarten and early childhood education offerings, resources permitting.	22%		56%	22%		100%
Ensuring that a higher percentage of third-graders are reading at grade level.	11%	11%	33%	44%		100%
Ensuring that a higher percentage of students are participating in Advanced Placement exams.		11%	11%	11%	67%	100%

Section 1. Our Students

1.1 Academics

1.1 The Director is ...



Section 1. Our Students

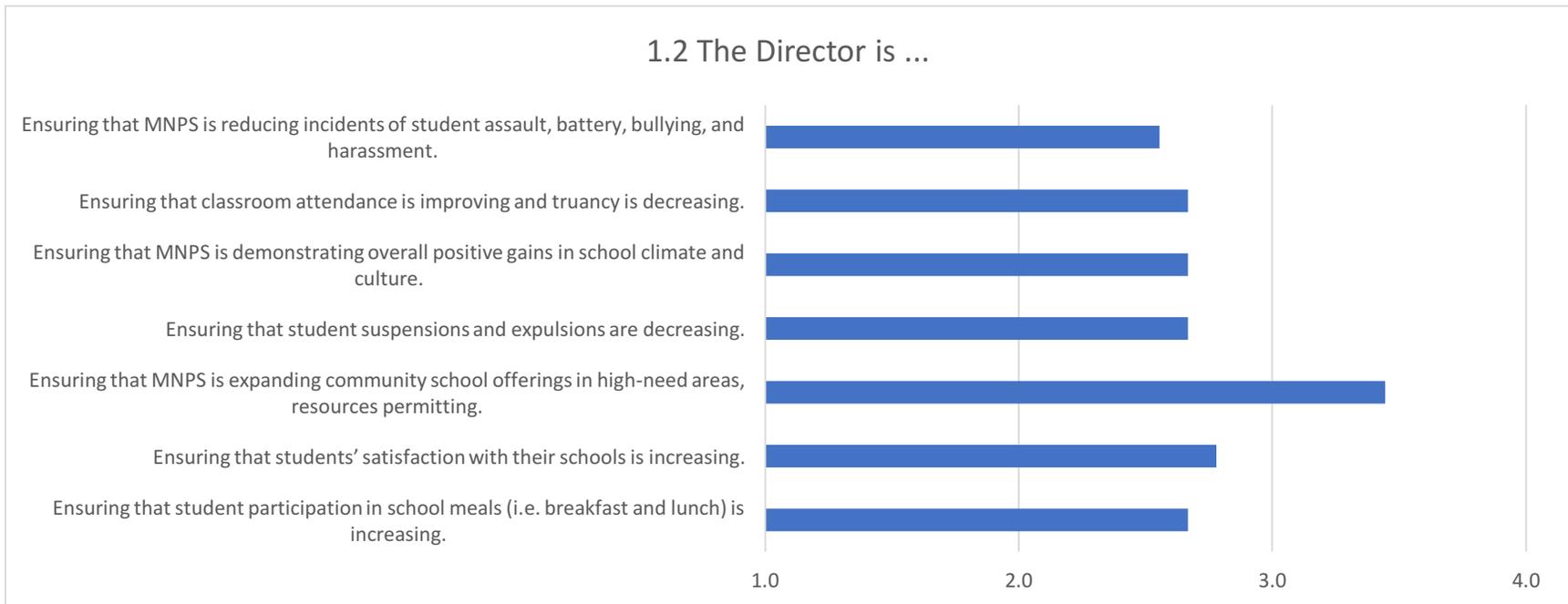
1.1 Academics

Section 1.2 School Climate and Culture

1.2 The Director is ...	Count						Avg. Rating (5-pt. scale)
	Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations	Exceptional	Total	
Ensuring that MNPS is reducing incidents of student assault, battery, bullying, and harassment.	1	2	6			9	2.6
Ensuring that classroom attendance is improving and truancy is decreasing.		3	6			9	2.7
Ensuring that MNPS is demonstrating overall positive gains in school climate and culture.	2	1	4	2		9	2.7
Ensuring that student suspensions and expulsions are decreasing.	2		6	1		9	2.7
Ensuring that MNPS is expanding community school offerings in high-need areas, resources permitting.		1	3	5		9	3.4
Ensuring that students' satisfaction with their schools is increasing.	1	2	4	2		9	2.8
Ensuring that student participation in school meals (i.e. breakfast and lunch) is increasing.	1	1	7			9	2.7

1.2 The Director is ...	Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations	Exceptional	Total
Ensuring that MNPS is reducing incidents of student assault, battery, bullying, and harassment.	11%	22%	67%			100%
Ensuring that classroom attendance is improving and truancy is decreasing.		33%	67%			100%
Ensuring that MNPS is demonstrating overall positive gains in school climate and culture.	22%	11%	44%	22%		100%
Ensuring that student suspensions and expulsions are decreasing.	22%		67%	11%		100%

Ensuring that MNPS is expanding community school offerings in high-need areas, resources permitting.		11%	33%	56%		100%
Ensuring that students' satisfaction with their schools is increasing.	11%	22%	44%	22%		100%
Ensuring that student participation in school meals (i.e. breakfast and lunch) is increasing.	11%	11%	78%			100%



Do you have specific comments about the Director’s performance relative to Section One (Our Students)?

<p>I am intrigued by Dr. Joseph's attention to details and focus as it relates to school culture and climate and student satisfaction. He has been intentional in providing opportunities for students, teachers, and support staff to voice their concerns as well as granting them opportunities to weigh in on solutions and ideas to implement for problem solving.</p>
<p>The academic growth of MNPS students is being strategically supported now. The increase in student participation in Advanced Academics is notable.</p>
<p>With the administration of MAP testing in grades 2-8 in both reading and math, MNPS is finally able to objectively measure students’ academic growth with a nationally normed assessment--independent of TN Ready. After taking a dip in growth in the spring of 2017, MAP results in 2018 indicate positive strides in academic growth for nearly all student groups. There is much work left to do, but student academic growth is moving in the right direction, and as indicated on their survey, 77% of students report higher expectations and an academic press (section 1.2). Other strong highlights: Advanced Placement, IB, and Industry Certification exam fees covered in the 2017-18 budget resulted in great gains in the numbers of students taking, and passing, these exams. Continued Challenge: ACT composite and college readiness in all four subjects. Knowing this is a hard needle to move, it is still concerning that only 12% of our ACT test-takers; meet college ready benchmarks in all four areas tested. Future Recommendation: To continue to evaluate Dr. Joseph on academic progress, it will be helpful to distinguish academic results from schools that are implementing his initiatives: STEAM, Literacy Plan, etc. 1.2 School Climate and Culture While student and teacher surveys are new, they show promise for what’s going well (academic press, general school climate, while also highlighting opportunities for professional development (classroom management, feedback and coaching by administration). For students to rate classroom management at only 40% satisfaction, I would recommend monitoring incidents of behavioral disruptions to this section.</p>
<p>Pleased with the reports from Community Achieves regarding the reduction in truancy. Which could speak to an increase in students' satisfaction with their schools. Looking forward to actual student school climate survey results.</p>
<p>The focus on Literacy and its projected effectiveness is key to the advancement of our students' academic achievement. Likewise, the success of SEL is a crucial component leading to the improvement of growth in academic achievement for our students</p>
<p>I had difficulty completing the “Academics” section because there is insufficient data at this point to draw reliable conclusions, and there has been a great deal of “spin” around district outcomes, which have been heavily politicized. State testing has been unreliable and intermittent, and we do not yet have a full year of MAP testing to consider. MAP testing was not implemented with fidelity this year, and there are no end-of-the-year MAP scores to consider. The Director has provided the board with a lengthy self-evaluation, which the board did not ask him to complete. The "evidence" in the self-evaluation is presented through the lens of his interpretation. The board was not provided raw data to review, and information in the Director's self-evaluation is misleading and incomplete. (For example, it's unclear from the "evidence packet" whether pre-k options have been expanded, but funding is being cut from pre-k.) The Director has used this evaluation process for self-promotion, sending it out to all employees (before sending it to the board) and to the media before the board has had a chance to weigh in on this Director Evaluation. The purpose of the evaluation process is to create dialogue between the board and the Director, not to allow the Director to create a "spin" for the media, based upon his own interpretations of his work, rather than feedback from the entire board. A more truthful assessment of academic performance indicates as follows: Achievement levels within the district currently fall below national levels, and this means that in order to gain real footing, we must expect greater than average gains. This year, MAP test results indicate some</p>

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incremental gains, particularly on the winter MAP test. The results of the February MAP test, which have been widely touted, show a statistically significant increase in many scores, although progress is not dramatic. However, we still do not have a full year's worth of test results to gauge progress, and test results have vacillated this year. At this point, there is no clear trajectory or sustained positive upward trend with regard to student outcomes. While MAP test results this year were encouraging, only time will tell whether MNPS is truly trending in the right direction. In general, there seems to be good potential around some new district initiatives, such as STEAM. There is also an effort to focus on research-based programming through positive partnerships like ours with Vanderbilt. However, I would like to understand more about how we intend to implement the vision for these initiatives. For years now, the board has discussed improving student safety, implementing restorative justice practices, and reducing school suspensions (particularly for certain populations), but implementation of this vision continues to be a challenge. The district has not invested enough resources or training to effectively implement restorative justice practices. Because of this, teachers and school leaders seem to be in limbo. They have tried to reduce the numbers of suspensions and expulsions (and it appears from data shared with the board that numbers are down somewhat), but teachers feel their hands are often tied when it comes to disruptive students. In trying to comply with efforts to reduce suspensions/expulsions, many teachers feel they are left with few options to control bad behaviors that are impacting the learning of other students. It's vital that we provide greater support for restorative justice programs and other efforts to reduce the impact of student trauma. Also, teachers should be granted sufficient autonomy to manage their classrooms effectively, and principals should be provided the support to help make this happen. We should not allow a fixation on decreased suspension/expulsion numbers to take precedence over ensuring well-managed classrooms. The continued expansion of our community schools program has been very positive, and this may help offset some of the issues around classroom behavior. It's worth noting the need for school climate surveys that reflect feedback on both school leadership and district leadership. Many teachers feel that the questions on current surveys are addressed only toward school leadership (primarily their principals).

I am optimistic that with a renewed emphasis on SEL and focusing on students with chronic absenteeism, we will make greater gains as it relates to our students.

Although the director celebrated the rise in MAP scores during the Feb/March 2018 administration, the fact remains that MAP scores fluctuated. There is no indication of an upward trend. The following represents the MAP-R Median National Percentiles (NP) grades 2-8.

Jan/Feb 2017	May 2017	Aug/Sept 2017	Nov 2017	Feb/March 2018	42	37	41	39	44
-5	+4	-2	+5	Students lost 5 percentage points in reading second semester from Jan-May 2017. Students gained 4 percentage points during the summer when school was not in session. By the end of the first semester, students lost another 2 percentage points. Although students made up the loss by Feb/March, overall from Jan 2017 – March 2018, the net gain was a mere 2 percentage points. This is not an upward trajectory as Dr. Joseph has indicated. Literacy scores are inconclusive this year until achievement test data is received this summer. There is no indication which initiatives are working which contribute to a rise or fall in scores. In terms of national quintiles for MAP-R, MNPS is well below the national average in all quintiles except the lowest first quintile. To be clear, August/Sept 2017, 31.6% students, grades 2-8, scored at the lowest quintile; however, the director chose to withdraw support for proven interventions that help accelerate the lowest-performing students in 12-20 weeks of instruction by the highest trained literacy experts in Nashville. Although Dr. Joseph touts many accomplishments, facts reveal the director merely changed names of the previous administration's successful accomplishments and then took credit for those successes. An example of this is "literacy coaches". The director changed the name to					

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Literacy Teacher Development Specialists and took credit for the initiative. AART is a new title for our gifted program that has been in existence for decades. Balanced Literacy was a successful reading initiative before Dr. Joseph's arrival. He inherited balanced literacy in his first budget. Progress of literacy achievement during 2016-17 is evidenced by a score of 4/5 on TNReady achievement test. Nevertheless, the director changed the curriculum that was clearly working and brought in consultants who didn't know our students, teachers, schools or principals. Clearly a TVAAS score of 4 in reading demonstrated capacity. In order to bring in more consultants, Dr. Joseph consistently sent the message that Nashville teachers did not have capacity. As a result, the director brought in high paying administrators with many perks, who did not even lead literacy initiatives or trainings. As out-of-state administrators collected exorbitant salaries, the board had to pay outside consultants to do the work his administrators were unable to perform. Scholastic was paid approximately \$24,000 a day to conduct professional development when Nashville teachers could have performed the work with a higher level of expertise. Even with the high daily rate paid for outside consultants, trainers shared conflicting information to teachers which resulted in mass confusion. Graduation rates in 8/10 areas fell from 2016-2017. Economically disadvantaged students had the largest decline in graduation (79.5% to 75.6%). A loss of 3.9% is significant. On a radio show 3/18/18, the director stated the number of students enrolled in advanced academic courses in high school "doubled" this year. Considering AP classes, Cambridge and IB, the total student enrollment in advanced academic classes increased from 2,582 in 2016-17 to 3,795 in 2017-18. Although that's an increase of 46.9%, it's spinning the truth to say the number "doubled". During the 2018-19 school year the district will implement an across-the-board Pre-K fee structure to help better support equity and access to programs. Unfortunately, a grant terminated without sufficient planning or communication to parents. The new fee structure has been problematic for parents and the community. Parents suggest they will leave the district due to this last minute, unexpected change. No data has been provided to suggest that a higher percentage of third-graders are reading at grade level. Although 54.9% of students met projection growth goals, this in no way indicates more students are reading at grade level.

1.1 School Climate and Culture At least 52 high quality administrators left the district due to difficulties with current administration. Although student enrollment was projected to increase by 1500 students for school year 2017-18, MNPS lost 500 students. Although the board would be wise to determine why MNPS is losing top quality administrators and families, there are no current plans to investigate these concerns. Eakin Elementary and Antioch High have undergone major leadership and staff changes. Parents from Eakin and other schools across the district are concerned about the principal selection process. No changes have been made as a result of feedback from board members, parents and the community. When Dr. Joseph first arrived in Nashville, he set up an environment where employees were not allowed to communicate with board members. It took over a year to lift the gag rule. This greatly affected culture. When the director enacted a freeze on school budgets as a result of a \$7.5 million shortfall, he was unwilling to tighten his own belt and set a leadership example for staff. Although the use of a driver has been a point of contention since Dr. Joseph's tenure began, he has been unwilling to relinquish this self-granted perk. When I met with Dr. Joseph this semester for lunch, the location was 6 minutes from the board office; however, Dr. Joseph utilized his driver for that short trip. Dr. Joseph does not take responsibility for mistakes. When mistakes are made, he blames others. He blamed his administrative assistant when there was controversy over work completed at his residence. He blamed Chris Henson when school was not dismissed during increment weather. However, the director is the first to rise and take credit with good news. Even at the mayor's budget hearing, Dr. Joseph allowed Chris Henson to take the heat over the \$7.5 million shortfall. The director sat silently and offered no support when the mayor asked for rationale why spending wasn't curtailed to accommodate for loss of funds. Problems with safe drinking water have been rampant over the last two years. EPA says water

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can become unsafe when old pipes have lead. Once again, Dr. Joseph is quiet when negative stories are reported. Dennis Neal and Chris Henson answered question on camera but the director was silent. It is inexcusable that two years after problems surfaced about the safety of students' drinking water, little has been done to rectify the problem. When I spoke with Dr. Joseph about this issue, he repeatedly denied the problem but instead accused Channel 5 and Phil Williams of being racist. This could be one of the reasons parents of 500 students chose not to enroll in MNPS 2017-18. The MNPS Student Climate Survey indicated that students find Dr. Joseph's curricula to lack student voice (49%). Student engagement (43%) was also impacted. The director brought in scripted (CKLA & IFL) curricula and decodable texts, stripped of meaning and students' language structure. These texts are boring to teach and especially boring to read as they do not relate to students' background, interests or knowledge. When students are not engaged, classroom management is impacted (40%). Even with this knowledge, Dr. Joseph plans to expand CKLA's scripted curriculum and decodable texts. Teachers Climate Surveys indicated teachers need more classroom resources (39%). Overall, teachers appear to believe the quality of PD is lacking in the district (54%), and the quality of feedback from coaching could be greatly improved (48%).

Generally speaking, I'm pleased with the overall progress relative to our most important focus – Our Students. Obviously, much work remains in a school system that for too long suffered from absentee leadership, but that should in no way diminish the accomplishments of the past two years. Dr. Joseph's vision of equity for all students is our center of gravity and I fully subscribe to this philosophy. I appreciate Dr. Joseph's reserved approach in his self-evaluation in these areas; these are among the toughest indicators to move. However, in two measures, 1.1c ("Ensuring that English Learner students are making progress toward language development") and 1.2d ("Ensuring that student suspensions and expulsions are decreasing"), I believe the administration has under-estimated its progress, therefore I am assigning higher ratings than Dr. Joseph's self-evaluation. As it relates to the former, I know from experience representing South Nashville that significant gains have occurred with our youngest New Americans and I encourage the administration to double-down on board-mandated innovations. With respect to the latter, I'm impressed by what appears to be a nearly 12% decline in out-of-school suspensions involving nearly 1,800 students. While an additional 54 students were assigned to ALCs and an additional 18 students were expelled (and this needs to be addressed), the raw data is nonetheless encouraging. Regarding the use of MAP data in academic measures, the board may want to engage external expertise to pressure-test the administration's methodology in the future. I'm not convinced that comparison to national percentile measures is good enough for a school system with our ambitions, and this warrants further discussion. Additionally, I see areas in which the evaluation instrument may need to be adjusted or sources of evidence need to be expanded; we should discuss this as a committee as we get more experience with this new process. Finally, I would be remiss if I did not say: By including TVAAS as evidence of improvement in four academic measures, the administration is demonstrating a fundamental misunderstanding of the board and the community's expectations. The board has spoken on numerous occasions, in committee and on the floor, about our concerns relative to the lack of credibility of TNReady – which, of course, is the underlying basis of TVAAS. A growing body of evidence suggests that TVAAS is not statistically reliable. The rocky transition between state assessment systems has made TVAAS even more questionable. Based on the totality of our conversations, I assume the inclusion of TVAAS data was inadvertent and likely determined by staff who weren't in the room during our many discussions. Let's discuss further in committee.

Section 2. Our People

2.1 Employee Relations and Development

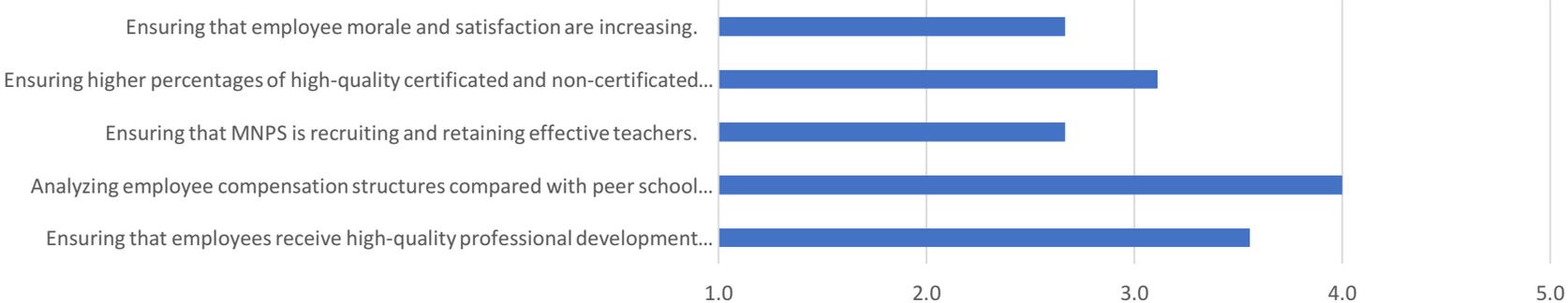
2.1 The Director is ...	Count						Avg. Rating (5-pt. scale)
	Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations	Exceptional	Total	
Ensuring that employee morale and satisfaction are increasing.	2		6	1		9	2.7
Ensuring higher percentages of high-quality certificated and non-certificated employees in all assignments.	2		2	5		9	3.1
Ensuring that MNPS is recruiting and retaining effective teachers.	2		6	1		9	2.7
Analyzing employee compensation structures compared with peer school systems in the region and around the country, and advocating for competitive compensation.	1		2	1	5	9	4.0
Ensuring that employees receive high-quality professional development opportunities.	1		2	5	1	9	3.6

2.1 The Director is ...	Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations	Exceptional	Total
Ensuring that MNPS is reducing incidents of student assault, battery, bullying, and harassment.	22%		67%	11%		100%
Ensuring that classroom attendance is improving and truancy is decreasing.	22%		22%	56%		100%
Ensuring that MNPS is demonstrating overall positive gains in school climate and culture.	22%		67%	11%		100%
Ensuring that student suspensions and expulsions are decreasing.	11%		22%	11%	56%	100%
Ensuring that MNPS is expanding community school offerings in high-need areas, resources permitting.	11%		22%	56%	11%	100%

Section 2. Our People

2.1 Employee Relations and Development

2.1 The Director is ...



Do you have specific comments about the Director’s performance relative to Section Two (Our People)?

This quarter has been challenging due to the difficult budget season. Dr. Joseph's strength around this process is that he continually stated, prior to embarking upon budget season, that it would be a difficult season. Despite the challenges, his team continued to collaborate with one another and produced a budget that we felt confident would continue to drive student achievement upwards as well as improve the lives of our paraprofessionals.

This administration worked tirelessly to advocate for increased funding, but there is still relationship building that will help in the future.

I think in light of what Dr. Joseph can control, he is trying to set a positive environment. In terms of evaluating professional development, the performance matters tool will hopefully further guide Dr. Joseph and his team on which sessions teachers find relevant and useful. On page 31 of the evidence packet, addressing & resolving the last bullet of the VU Capstone Study, is critical: Mixed Messages: Administrative support and other positive aspects of faculty culture were undercut by logistical concerns that made it difficult to pursue district-level professional learning experiences.

We work and serve in a space where it is challenging to have 100% satisfaction among all. The efforts this administration has made to listen to the needs and concerns of ALL employees that work to provide a high quality education experience and environment for ALL students is greater than any I have ever witnessed and exceeds efforts made in several other urban school districts of our size and mix. And to balance that with the academic, social and emotional needs of our students, both within budget, is more an art than a science. Dr. Joseph and his administration have shown a genuine and well informed concern for students and their families and the employees of our district. During the times when those interests don't align to meet everyone's expectations, stronger efforts need to be made to communicate those challenges EARLY and attempts made to elicit the board's HELP in articulating the challenges. The BOARD as a collective has the responsibility to help pave the way with our constituents for the difficult decisions that have to be made. We have work to do in this space. Early and clearer communication will help.

Dr. Joseph knows the importance of PD and has implemented sessions for all departments. It allows for focus on improving relationships, clearer communication, and better collaboration so that all are working from the same blueprint

Employee morale is alarmingly low. Plummeting employee morale appears to be related primarily to the lack of experienced, competent leadership at top levels, as well as vindictive and arbitrary HR practices, including unfair pay practices. The district is hemorrhaging qualified, experienced administrators, principals, and teachers at a startling rate. Large numbers of highly qualified district leaders and teachers, many of whom were highly commended for their work, have left the district in the past two years. Well over 700 job openings are currently advertised on the MNPS website. Even our most recent Teacher of the Year is leaving for a job in a neighboring county. There is an appearance of cronyism within the district that benefits a few, but that does not benefit our students. Staff report that new hires are often unqualified and ill-equipped for their work. The administration has failed to properly advertise all positions so as to draw from a pool of the most qualified candidates. Many promotions, new hires, and salary rates seem to be based on friendships or relationships with top administrators, rather than on ability, training, or expertise. For example, someone with no classroom experience whatsoever was hired to lead professional development for the district; her lack of expertise and understanding of the subject matter left teachers appalled. Another employee with only a half a year of experience as a principal was hired to supervise and advise more qualified and experienced principals. Other employees with terrible reviews in their current positions are being promoted. More specifically, principals with prior relationships with

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top administrators have been allowed to stay in their positions and are sometimes promoted even when they garner terrible reviews and results. One principal who is friends with a Chief is being paid more than any other principal at her level, even though this principal has less experience and less education than many other principals in the district. MNPS is also paying half the cost for this principal to receive her doctorate. There is a great deal of mistrust in hiring processes, which appear to be manipulated in favor of certain candidates. This is happening at all levels of hiring, but one specific example involves the process for hiring principals. This process involves a panel of community members who are tasked with selecting the top candidates for the Director to interview. Many who have been involved in the process have complained that the principals who are ultimately hired were not selected by the panel. The underlying problem is that the process is not transparent, and this flawed process has created mistrust. Many new leaders are viewed as incompetent by experienced staff members and the school administrators and teachers who work under them. To make up for the deficit in leadership, the district is now spending large sums on consultants to head up work that should be led by our own highly paid district leaders, who are earning much more than previous district leaders. Although the Director has repeatedly stated that the district does not have the capacity to undertake certain initiatives, staff report that many consultants are less informed than existing employees. Some consultants have questioned why they are here. One consultant even commented that those already employed within MNPS know more about the subject matter on which he was advising. Arbitrary pay practices for employees are also causing major culture problems within the district. Employee raises and salaries have no basis with regard to market demand, and there seems to be no consistency with pay for employees of similar classification. Some employees who are friends or relations to top level administrators and who have less qualifications than other employees are being unfairly paid more than other employees. For example, the spouse of one Chief was paid a unexplained \$24,000 stipend, and when board members asked about the stipend, the Director misinformed the board: First, board members were told there was no stipend. Then, when board members pointed out a salary schedule that included the stipend, Dr. Joseph's team admitted that this employee was paid a stipend, explaining that several similarly situated employees were earning the same stipend. However, when board members verified this wasn't true, the story changed yet again. Board members were then informed that the stipend was for extra duties taken on by this employee; yet the employee's duties actually decreased during the time she was granted the stipend. These sorts of dishonest representations to board members have obviously caused major problems with trust. In general, salaries for many MNPS employees are inordinately high for government salaries and inconsistent with salaries for similar Metro positions. For example, Dr. Joseph has created two leadership positions with similar titles in Human Resources: the Executive Officer, who earns \$170,000 per year, and the Chief Officer, who earns \$150,000 per year. In contrast, the Human Resources Director for Metro government is paid only \$130,000 annually. Salaries for Executive Officers range from \$130,000 to approximately \$155,000 for similar scope and responsibilities. Inexplicable discrepancies in salaries (not based on the number of staff members, work load, experience, or expertise) cause resentments among employees. Also, under the previous administration, top administrators earned annual salaries of \$155,000 each. Dr. Joseph has added top level administrators to his staff and now pays four Chiefs \$185,000 per year and another other Chief \$170,000 annually. Former Chief Academic Officer Jay Steele, who earned \$155,000, was alone performing the same job that now is fulfilled by two Chiefs, each earning \$185,000. The Mayor of Nashville earns \$180,000, which means that several second-tier MNPS employees are paid in excess of the mayor's salary. Furthermore, Dr. Joseph's contract calls for an annual salary of \$337,000, which is the highest of any superintendent in the state. (The board, of course, is responsible for approving this salary, per contract.) Dr. Register, Dr. Joseph's predecessor, earned an annual salary of \$266,000. For comparison, the Shelby County Schools superintendent earns \$277,000, the Knox

County superintendent earns \$180,000, and the Hamilton County superintendent earns \$170,200. Although the need for raises at top levels was pitched to the board as necessary to attract the most qualified leaders, it does not seem that MNPS is conducting competitive searches to recruit the most competent employees. Rather, it seems that cronyism lies behind pay increases. Staff members, particularly those working in Central Office, describe the new culture as a “hostile work environment.” One top administrator has been heard yelling at employees from down the hall. Another administrator has run into an employee’s office, snatched papers from the employee’s hand, and torn them up in front of the employee. There have been complaints of sexual harassment which were not properly addressed. Sexual harassment is being investigated differently depending upon the accuser and who is being accused. These sorts of unprofessional behaviors should never be tolerated. Retaliatory behavior by district leaders is causing ongoing dysfunction within the district. Staff members report that new leaders are vindictive toward anyone who questions their practices. Many competent staff members have opted to leave to avoid being forced to comply with what they describe as “shady” and concerning practices. Employees are expected by the Director and his Chiefs to be “yes men,” rather than collaborators on the work of the district, and those who are willing to openly question problematic practices are sometimes punished. Some employees report that district leaders have threatened to damage their future job prospects for sharing information about what is happening in the district. This has resulted in a culture of fear and silence at leadership levels. One problematic issue involved the suspension of a high school coach, which was strangely brought before the board unlike any other previous employee suspension. In this case, the Director had the option of giving the employee a three-day suspension, but instead unnecessarily involved the board in a suspension hearing matter without attempting to terminate the employee. (The normal practice would have been to give a three-day suspension; more serious infractions typically result in terminating the employee.) Rather than resolving an issue within his full control, the Director opted to require the board to publicly vote on a ten-day suspension, which brought an internal HR matter to public attention. The ten-day suspension will now require a public hearing at substantial cost to the district. The way in which the matter was handled seems peculiar punishment for this employee, outside other norms, and it appears to be no coincidence that the employee is related to a Central Office official. Furthermore, the sudden termination of the Reading Recovery program caused major issues with regard to both employee and board relations. In a move that appeared to be clearly retaliatory toward one board member, the Director waited until the very last day of the budget season to cut 87.5 Reading Recovery teachers, who are the district’s most highly trained, elementary level reading teachers. It is unprecedented for a Director to insert a major new change in the budget on the day of the final (and third) vote for the budget. In this case, the Director opted to cut a program he had highly lauded both during his initial interviews with the board and during last year’s budget hearings before the Council. In fact, he had chosen to include Reading Recovery in the budget only weeks before calling to dismantle it. The program, however, was a favorite of one board member, and after this board member called for an audit of the district, the Director suddenly decided to pull the program. During the thirty minutes immediately prior to the board meeting at which the board voted to cut the Reading Recovery program, the Director was actually firing Reading Recovery leaders. He obviously knew he already had the votes to kill the program. The board has never before been asked to make a substantial change like this at the eleventh hour, on the very day of our final vote, after we have reviewed two other budget drafts, and the timing of this change was particularly poor. Although the Director promised that schools could still opt to utilize the Reading Recovery program, school budgets had already been set, so there was no money for extra programming. This meant that none of teachers could remain in their areas of certification, and many of the teachers worry that they will be unable to maintain their certification, in which the district has invested \$1.5 million for training over the last five years. Because of the timing of the

decision, there were also limited positions open for the teachers, which meant many were not able to work within their areas of expertise and training. At this point, no schools will be able to fund the Reading Recovery program next year. The Director also promised that there was a plan to “repurpose” the Reading Recovery teachers and promised them a signing bonus to work in priority schools, apparently not realizing that all of them were already working in high-needs schools and some were already working in priority schools. However, there was no plan in place for these teachers, and even after hours of meeting with administrators, the teachers still had no idea where they were to be rehired. After the program was cut, political pressure mounted to place the teachers, and the district began to scramble to place them. In response to questions from Metro Council members, MNPS shared a list of Reading Recovery teacher placements showing that over half of the teachers were either not placed, leaving the district, or working in areas outside their expertise (e.g., teaching EL, special needs, middle school, high school, art). The very next day, however, the district suddenly announced that all teachers had been placed. As it turns out, not all teachers had been notified of the placements, and many teachers were assigned to any open positions the district could find. The teachers were surprised by this announcement because they were not consulted on where they might want to teach, and some were assigned to schools at extreme distances from their homes. Some had already accepted positions, but because these teachers were not consulted, they were unnecessarily placed in other positions. Many were placed in positions outside their areas of expertise. When some teachers reached out to the schools to which they were assigned, they learned that the positions there didn’t actually exist; the assignment was a mistake. In at least one case, two teachers were assigned to the same position. I share this extended story because it illustrates several points. First, while it is certainly appropriate to engage the board in a larger discussion about the efficacy of literacy programming, the way in which this was handled was very unprofessional, and it has eroded confidence in top MNPS leadership. (Many of the Reading Recovery teachers report that they have lost trust in the administration and no longer want to work for MNPS, and other respected staff members have said they are actually “embarrassed” by how the Director has treated one board member over this affair.) It demonstrates the Director’s willingness to prioritize petty, personal politics over professionalism and retaining/supporting excellent teachers, as well as vindictiveness by the Director toward his own employers. It also demonstrates disorganization and a lack of planning on the part of the administration, which has directly impacted some of our best teachers. Most importantly, however, this change will have a negative impact on students because there is still not a structured literacy plan in place to make up for the deficit caused by removal of the Reading Recovery program. We cannot cut programs without a clear plan in place to ensure that students will receive the instruction and interventions they need to succeed. Two bright spots in this area: (1) The new collaborative conferencing with teachers seems to have been well-received. (2) The Director’s agreement to an MOU with the SEIU has helped improve relations with employee members of the organization.

I am bothered by the departures of knowledgeable Central Office staff and very qualified faculty in the last two years. Folks like Kevin Stacey, Scott Lindsey, Cicely Woodard just to name a few. Those are huge losses.

Employee morale and satisfaction are at an all time low. In the director’s 6/23/18 weekly memo, Dr. Joseph shared information about climate at central office. The following questions relate to culture. Q1. The current organizational climate promotes an Outward Mindset. “Yes, Absolutely” fell from 8.7% in 2017 to 2.25% in 2018. Q2. We work in a trusting environment where there is an open flow of ideas and information. “Yes, absolutely” fell from 19.86% in 2017 to 3.57% in 2018. There are no systems in place that allow teacher feedback. After talking with the director about this need, he promised to conduct 3-4 Teacher Listening Sessions; however, only 2 occurred. So many stipulations were imposed around the sessions, they proved to be virtually worthless. Teachers had to sign in. Administrators and central

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office personnel attended. Teachers didn't feel comfortable. Parameters only allowed teachers to talk about certain topics. No evaluation was in place for teachers' feedback until the very end of the second series of meetings, after I had made multiple requests. Employee Compensation Cronyism is rampant as a result of Dr. Joseph's leadership. He pays his friends above pay scale. One principal is paid over scale while she lacks credentials to receive the high compensation. Although she is working on a doctorate at the district's expense, she is paid above scale for experience and education. This administration is often not transparent about issues regarding employee compensation as evidenced from the example below. On March 7th, HR reported "... according to payroll records this year, Maritza Gonzalez had NOT received any stipends or extra compensation." Consequently I was provided a document from an employee at central office that proved Gonzalez did indeed receive a stipend of \$24,168.29. Upon further investigation, On April, 4 I received a very different story. And I quote. "Five employees (Maritza Gonzales, Amy Wyatt, Antoinette Williams, Terry Schrader, and Vanessa Garcia) all went from being Executive Officers to Executive Directors as part of central office reorganization. Their salaries went from \$155K to \$130K. The decision was made to keep their salaries intact through the end of the fiscal year. This necessitated treating the difference in pay as a "stipend" rather than as "salary." That difference in pay (about \$961/pay period) goes away at the end of this fiscal year when the new budget takes effect. The reorganization occurred at the beginning of our current fiscal year, hence the stipend is for one full fiscal year. " When I checked with Mrs. Garcia, Mrs. Williams and Mr. Shrader, each confirmed they had NOT received additional compensation. Which means the only person who received a \$24,000 stipend was the wife of the Chief of Schools, Maritza Gonzalez.

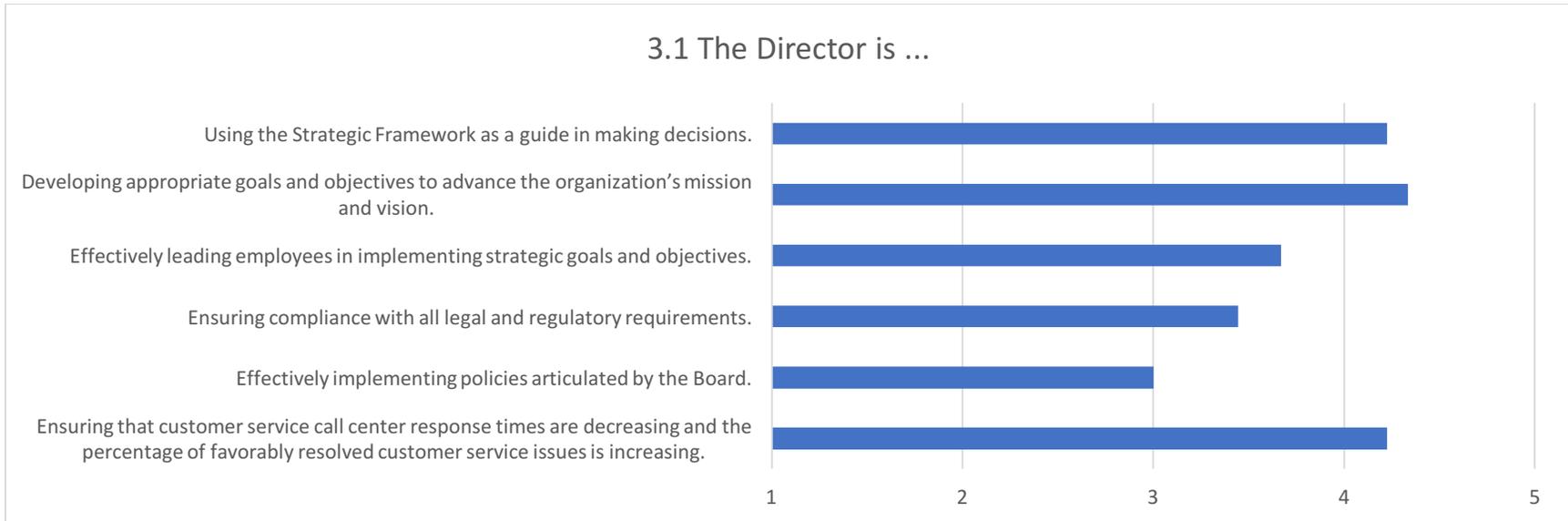
Generally speaking, I'm pleased with the overall progress relative to employee relations and development. Restructuring of the HR office is a significant step forward. Likewise, I'm grateful for the recent compensation study and what it has revealed with respect to our structural deficiencies. While not without hiccups, the collaborative conferencing process with MNEA has been a success. Similarly, Dr. Joseph has done a great job in putting an end to the Central Office's longstanding feud with support employees and the SEIU. In my heart, I believe what's best for employees tends to be what's best for the organization. The more we can focus on employee satisfaction, the more we will be successful in accomplishing our mission. Looking ahead, I would like to see more survey data relative to employee satisfaction, or lack thereof. Let's discuss further in committee.

Section 3. Our Organization
3.1 Planning and Administration

3.1 The Director is ...	Count						Avg. Rating (5-pt. scale)
	Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations	Exceptional	Total	
Using the Strategic Framework as a guide in making decisions.		1	1	2	5	9	4.2
Developing appropriate goals and objectives to advance the organization’s mission and vision.		1	1	1	6	9	4.3
Effectively leading employees in implementing strategic goals and objectives.	2			4	3	9	3.7
Ensuring compliance with all legal and regulatory requirements.	1	1	1	5	1	9	3.4
Effectively implementing policies articulated by the Board.	2		5		2	9	3.0
Ensuring that customer service call center response times are decreasing and the percentage of favorably resolved customer service issues is increasing.		1	1	2	5	9	4.2

3.1 The Director is ...	Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations	Exceptional	Total
Using the Strategic Framework as a guide in making decisions.		11%	11%	22%	56%	100%
Developing appropriate goals and objectives to advance the organization’s mission and vision.		11%	11%	11%	67%	100%
Effectively leading employees in implementing strategic goals and objectives.	22%			44%	33%	100%
Ensuring compliance with all legal and regulatory requirements.	11%	11%	11%	56%	11%	100%

Effectively implementing policies articulated by the Board.	22%	56%	22%	100%	
Ensuring that customer service call center response times are decreasing and the percentage of favorably resolved customer service issues is increasing.	11%	11%	22%	56%	100%

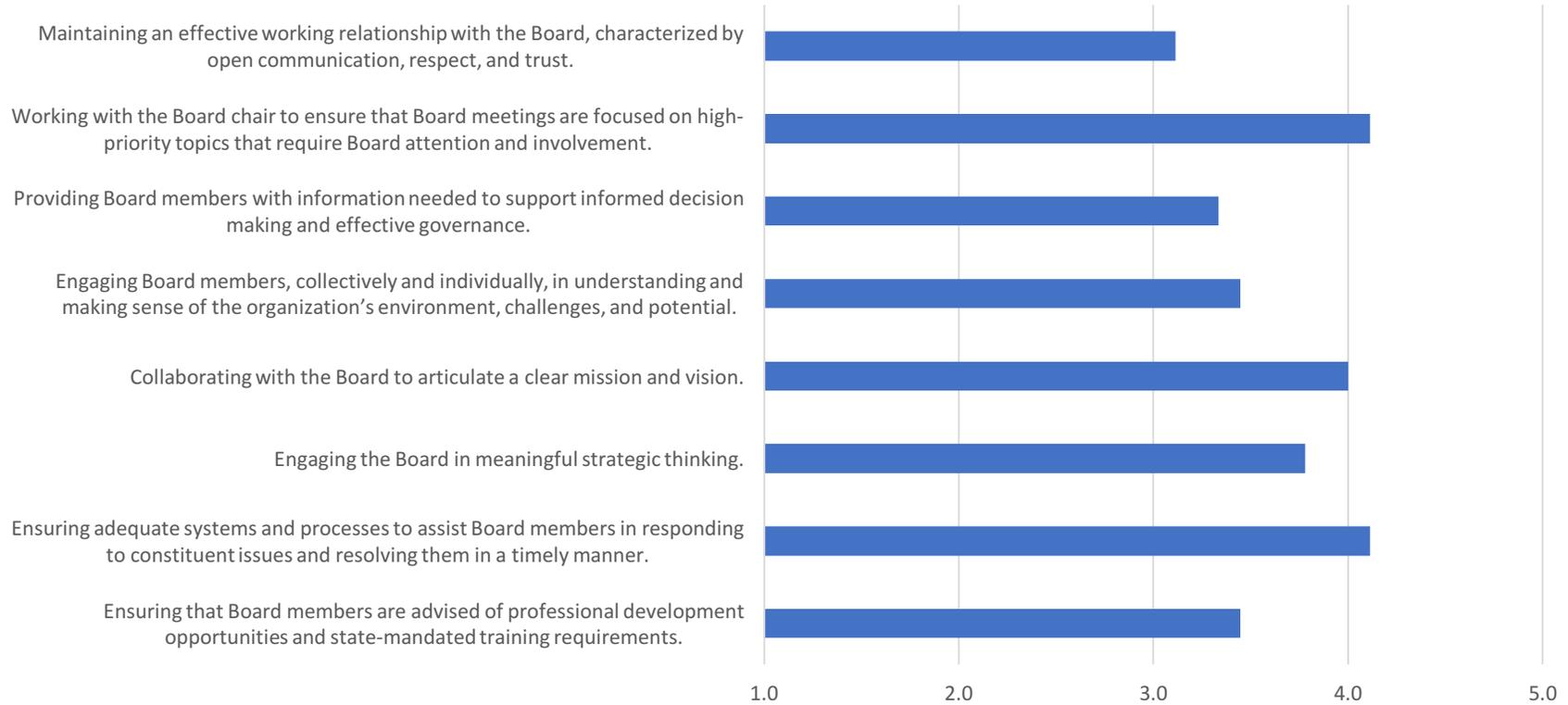


3.2 Board Relations

3.2 The Director is ...	Count					Total	Avg. Rating (5-pt. scale)
	Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations	Exceptional		
Maintaining an effective working relationship with the Board, characterized by open communication, respect, and trust.	2		2	5		9	3.1
Working with the Board chair to ensure that Board meetings are focused on high-priority topics that require Board attention and involvement.		2		2	5	9	4.1
Providing Board members with information needed to support informed decision making and effective governance.	2		1	5	1	9	3.3
Engaging Board members, collectively and individually, in understanding and making sense of the organization’s environment, challenges, and potential.	2		2	2	3	9	3.4
Collaborating with the Board to articulate a clear mission and vision.	1		1	3	4	9	4.0
Engaging the Board in meaningful strategic thinking.	2			3	4	9	3.8
Ensuring adequate systems and processes to assist Board members in responding to constituent issues and resolving them in a timely manner.		1		5	3	9	4.1
Ensuring that Board members are advised of professional development opportunities and state-mandated training requirements.		1	5	1	2	9	3.4

3.2 The Director is ...	Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations	Exceptional	Total
Maintaining an effective working relationship with the Board, characterized by open communication, respect, and trust.	22%		22%	56%		100%
Working with the Board chair to ensure that Board meetings are focused on high-priority topics that require Board attention and involvement.		22%		22%	56%	100%
Providing Board members with information needed to support informed decision making and effective governance.	22%		11%	56%	11%	100%
Engaging Board members, collectively and individually, in understanding and making sense of the organization's environment, challenges, and potential.	22%		22%	22%	33%	100%
Collaborating with the Board to articulate a clear mission and vision.	11%		11%	33%	44%	100%
Engaging the Board in meaningful strategic thinking.	22%			33%	44%	100%
Ensuring adequate systems and processes to assist Board members in responding to constituent issues and resolving them in a timely manner.		11%		56%	33%	100%
Ensuring that Board members are advised of professional development opportunities and state-mandated training requirements.		11%	56%	11%	22%	100%

3.2 The Director is ...

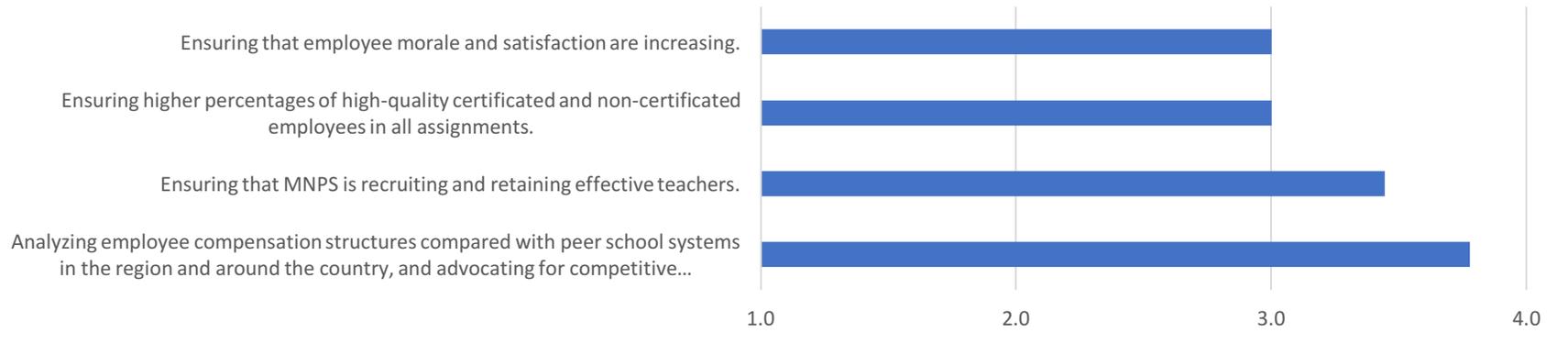


3.3 Financial Management

3.3 The Director is ...	Count						Avg. Rating (5-pt. scale)
	Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations	Exceptional	Total	
Making sound financial decisions and recommendations based on a thorough understanding of the organization’s overall financial picture.	2	1	1	5		9	3.0
Allocating financial and human resources appropriately to achieve organizational goals and objectives.	2		3	4		9	3.0
Ensuring that MNPS is improving energy efficiency and achieving cost-savings in facilities and the transportation fleet.		2	1	6		9	3.4
Advocating for increased resources at the local, state and federal levels.		2	1	3	3	9	3.8

3.3 The Director is ...	Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations	Exceptional	Total
Making sound financial decisions and recommendations based on a thorough understanding of the organization’s overall financial picture.	22%	11%	11%	56%		100%
Allocating financial and human resources appropriately to achieve organizational goals and objectives.	22%		33%	44%		100%
Ensuring that MNPS is improving energy efficiency and achieving cost-savings in facilities and the transportation fleet.		22%	11%	67%		100%
Advocating for increased resources at the local, state and federal levels.		22%	11%	33%	33%	100%

3.3 The Director is ...



Do you have specific comments about the Director’s performance relative to Section Three (Our Organization)?

The collaborative work around the strategic plan was impeccable. It is my opinion that, we were stronger, despite being an underfunded school district, because we were intentional in articulating our goals and expectations. Dr. Joseph executed by reaching out to various stakeholders consistently. In addition, he was able to agree upon and sign a MOU with SEIU. There is still work to be done but this is setting the stage for a great organization. Collaboration is key, even when we don't always agree.

Dr. Joseph has remained professional and transparent throughout a rough Spring semester. Continued efforts in relationship building around the city will assist in increased support from the Nashville community.

The investment made by Dr. Joseph and the Board in the 2016-17 year is paying great dividends in this area. The strategic plan, with clearly written KPIs, is the guide Dr. Joseph uses in making decisions. The goals and objectives are reiterated throughout every meeting agenda and retreat, which has made the board’s monitoring of our objectives easier with staff reports aligning to our KPIs. 3.2 Board Relations Exceeds Expectations and/or Exceptional— b, e, g, h • Meetings became more focused and easier to follow with slightly fewer recognitions and presentations preceding board business and the monitoring presentations under the Director’s Report. The agenda clearly follows our strategic plan and KPIs. Do recommend all power points and presentation materials be presented to the board in board agenda packet in order to allow for board member review and opportunity for more thoughtful questions. Meets or expectations with specific opportunities for growth and improvement—a, c, d, f • As stated in my September 2017 stop-gap evaluation, the weekly memos are informative but often too long with important changes often included in between more day to day work. I highly recommend including an executive summary noting important changes to administrative policy or practice, and especially, any information related to matters that will be voted upon by the board need to be clearly identified. (a,c) • As for strategic thinking with the board, I believe retreats could be better used for this alongside a common time for board members to share common strengths seen in the district/director as well as common frustrations. This past year, we could have moved past some of the Panasonic-led sessions that were still at a high level, and focused in more of strategic changes to the organization and the to the budget. Granted, this would have been difficult based on board member attendance and/or media presence. While a mid-February retreat was proposed by Dr. Joseph to discuss the changes to Title 1 dollars, it came late and fell on holiday weekend, and ultimately did not happen. The hugely impactful changes proposed to Title 1 dollar allocations were not well vetted by staff and board was given very little time to understand impact before being officially proposed. This resulted in an unnecessarily chaotic start to the budget season. (d, f) 3.3 Financial Management Excellent work continues in improving energy and transportation efficiency savings so more dollars are available for the classroom. Also, excellent work happened in grant and philanthropy funding which are greatly needed for increased per pupil funding. Strongly support the ROI work begun this year in seven areas: Literacy, Pre-K, English Language Learners, Exceptional Education, Social-Emotional, STEAM, and Advanced Academics. I believe Dr. Joseph should also include the Academies and Alternative Learning Centers. Determining the overall cost, cost per pupil served and the return of each program is critical in ensuring our limited dollars are used for areas providing highest impact for students. Areas in need of improvement: As soon as we know of lower than expected revenue due to lower than projected enrollment or higher than projected expenses due to increased staffing needs (substitute teachers or bus drivers, etc.), tangible changes in spending must occur as early as possible to avoid additional shortfalls. In a district our size with many variable factors on both revenue and expense sides, allowing for margin is imperative. I would recommend budgeting district

Section 3. Our Organization

spending to 98.5-99% of allocated dollars rather than 99.5-100% as to allow for unforeseen expenses and/or revenue shortfalls as we had this academic year. When completed, the audit might also give guidance to other processes/practices to ensure greater stability to the budget.

(no response)

Dr. Joseph exhibited outstanding skills in assessing the needs of our system. He arrived with a plan on how to develop a comprehensive strategic plan that would meet the needs of our students, our people, our organization and our community. Stakeholders have been on board the entire time during his leadership.

I would like for this document to reflect my full journey since the time of the Director's arrival, as I strongly supported his hiring and was initially one of his most ardent supporters. I bought into the vision he shared with the board- a vision which included high level academics, greater districtwide equity, whole child education with social emotional learning and support, wraparound services for children in need, a focus on literacy, and an improved culture for employees. Through early board trainings and retreats, the Director was able to temporarily heal fractures within the board, and the board worked effectively together to create a strategic plan. But two years later, it is apparent that implementation of our plan has fallen far short, and when questioned about problems, the Director has refused to accept responsibility. The Director has avoided accountability, ignored feedback, and scapegoated board members who have attempted to voice concerns raised by numerous district employees. These problems became particularly apparent during the 2017-18 budget discussions, when the Director was less than transparent and unwilling to address issues. He has engaged in vindictive and bullying behavior toward some board members, threatened lawsuits, and organized political events at meetings in an attempt to silence board members. Board/director relations have shifted substantially since the last director evaluation, as relations have become dysfunctional. The Director meets frequently with certain board members, with whom he seems to make special time, while barely communicating with others and failing to return phone calls from some board members. The lack of professionalism concerning board relations has caused new divides on the board, which was initially united two years ago. The Director has helped to foster an atmosphere of "out of the box" behavior by board members and failed to maintain an outward mindset himself. The Director often does not seem to recognize that he works for the board, but rather instructs board members on how to behave. The Director has not been forthcoming with requests for information- from the board, from the press, or from the public. Staff members report that the Director and his team regularly communicate through texts, rather than email, in a deliberate attempt to avoid open records requests. When questioned by board members during the budget season, the Director opted not to respond to some questions, even suggesting at one point that a board member wait for the results of the audit to get answers (a process which will obviously take months to complete). He has also responded to concerns by attempting to shame board members asking questions- either through his direct responses, by bringing in his fraternity brothers to publicly shame board members, or by pitting board members against each other. I have been frequently frustrated by the Director's stonewalling in response to my concerns and questions. The Director has been untruthful with the board on several occasions, and on other occasions, he has shared incomplete or partially inaccurate information with the board. As a result, board members seeking answers have had to dig for more information, but when Metro Council members asked similar questions during budget discussions, the Director was extremely quick to respond. Information sent to board members (and others) is often included as part of an "information dump," which leaves board members trying to assimilate and collect information on their own. The Director controls all information and data from the district, and many board members don't realize when we being given inaccurate information. Board members should not have to conduct their own inquiries to obtain accurate information; we should be able to trust the information we are

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provided. The fact that some of us have had to sleuth out accurate and complete information indicates a complete breakdown in functioning. Board trainings have been used to build a wall between the board and staff members. Staff (including teachers) have been instructed not to communicate with board members, and board members have been trained to communicate only with the Director. I understand the need to follow protocol and create established procedures for resolving complaints to the board. I also agree that board members should avoid trying to micromanage operations or resolve issues on their own. However, I believe that as elected officials, we should always be available to constituents, including staff members. Silencing staff members has only created more mistrust and fear. It has also allowed the administration to operate with limited oversight, keeping board members in the dark about serious problems in the district. There is really no other outlet for staff members to express serious concerns. The Director has suggested that staff members should just speak publicly at meetings about issues, but staff are well aware that this could cost them their jobs, particularly considering the vindictive behaviors exhibited by top leaders. During our board trainings last year, the board and Director finally agreed to lift the ban on staff/board communications, but I understand that the Director has announced the ban again this year (without board approval). Staff remain confused about whether they can speak to us, and the more the administration tries to clamp down on these sorts of communications, the more information leaks out. Finally, the Director has failed to address important topics, such as lead in water, during board discussions, even when board members have requested discussion of the topic. Board meetings often feel like a sales pitch, rather than an open, unvarnished discussion of issues, and the administration seems to avoid some difficult discussions that should be publicly addressed. Some bright spots in the area of Board Relations: The resolution of constituent matters continues to be effective and swift. Also, government and board liaisons in the district have made a more concerted effort to reach out to board members about issues and seek feedback from the board as a whole. With regard to Financial Management, there appears to be a great deal of overspending in the district and a lack of vision as to how to spend funds in alignment with our priorities. For the first time, the district is facing both a revenue shortfall of \$7.5 million and an unprecedented overage of at least \$3.5 million this year, which must be taken from district's reserves to complete the fiscal year. We will not know the extent of the problem until the budget is reconciled at the end of summer and/or until the audit is complete. At least part of the problem is due to an unwillingness or inability to follow financial protocols and procedures. Over the past two years, there has been a dramatic increase in unauthorized purchase requests (in other words, unauthorized expenditures) in the district. Ideally, a UPR is never used because a purchase order should always proceed any purchase, and according to internal MNPS communications, the only time a UPR should be used is in the case of an emergency, such as broken pipes. During this administration's first year, the number of unauthorized purchases increased more than sevenfold - from approximately \$300,000 to \$2.3 million. The trend continues this fiscal year. I am aware that sometimes URPs are triggered by accidental errors, and in a school district as large as ours, there is a certainly a human error percentage to take into account. But the ballooning number of unauthorized expenditures is a serious problem that warrants attention. With regard to contracts and consultants, the common theme seems to be avoidance of board scrutiny, which is the very opposite of transparency. For example, the district paid one company over \$100,000 for work performed without a contract; without a proper, competitive RFP bidding process; and without board approval, as required by board policy. After the work was complete, a contract was placed on the consent agenda for board approval, but then pulled immediately when a board member began asking questions. Attempting to pay vendors for work already performed before seeking the required board approval has been an ongoing problem for this administration. In the first year of this administration, consultant costs grew from \$5.1 million to \$8.6 million (then dropped to approximately \$6 million). I have yet to learn the total consultant costs included in this year's proposed budget, despite asking for this

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information for months. At least some of the new consultants appear to be questionable. For example, I received complaints about one consultant and looked into his background. According to the consultant's website, he has no background or training in education, and the district has paid this consultant over \$100,000. Also, according to a Channel 5 News story, the consultant worked in the district six months without a contract. Currently, the Director is allowed to hire consultants without board approval, but I believe it would be beneficial for the board to review consultants paid over a certain amount, as we do contracts. Furthermore, the administration is piggybacking substantial service contracts from contracts in other counties. Piggybacking is a procurement tool that allows for no bid contracts. While this practice is legal and sometimes used in large districts to save time and money, piggybacking service contracts is discouraged because of the inherent risk of fraud and the potential to get less than the best price. Many of our piggybacked contracts are affiliated with a non-profit company called Education Research and Development Institute (ERDI). ERDI is an organization that brings together school administrators and education vendors or businesses, purportedly so that the administrators can comment on the vendors' education products. ERDI's sole purpose is to act as a middleman between school districts and vendors. Education vendors pay ERDI high membership fees to arrange small-group meetings with superintendents and/or their high level administrators. How much vendors pay is related to how much time they get to spend with educational leadership. At the same time, ERDI also pays those superintendents and high-level administrators consulting fees to review products from ERDI-affiliated companies. In effect, ERDI passes money from vendors to superintendents who are supposedly engaged in an arms-length transaction about what to buy for their school districts. There are obvious ethical problems with this arrangement. To quote a Huffington Post article: "The problem with ERDI is that it pays those ed leaders for their input, which presents conflict of interest issues when those [same] ed leaders happen to be the ones who make purchasing decisions for ed products promoted by ERDI." In 2017, the Louisiana Board of Ethics ruled that it was unethical for Superintendent Isaac Joseph of Jefferson Parish Public Schools to accept anything of economic value from ERDI in connection with his position as a consulting educational leader. Youngstown, Ohio, superintendent Krish Mohip also ran into trouble when it was found that he was receiving ERDI consulting fees while buying products from an ERDI-affiliated company. This administration has brought in a number of ERDI partner companies as vendors for MNPS, and at least one top level MNPS administrator has disclosed receiving consulting fees from ERDI. Several MNPS contracts with ERDI partner companies have been called into question because many of these contracts are no-bid contracts of some sort or did not go through proper bidding procedures. This raises conflict of interest and ethical issues. The way to cure any questions about contracts with ERDI-affiliated companies is to ensure that these contracts are procured through an open, competitive bidding process or to simply ensure that administrators are not accepting any consulting fees from ERDI. ERDI partners include a number of other companies to which the district has awarded large contracts, including Discovery Education, for \$13 million, and Scholastic, which hosted 10 Metro employees (including a Chief who supervises literacy efforts) at the Ritz-Carlton on Amelia Island in February 2017. According to a News Channel 4 story, MNPS helped pay for the Amelia Island conference, but Scholastic also comped rooms for MNPS employees at the five-star hotel. Contract discussions with Scholastic took place on Amelia Island, and immediately after the conference, administrators tried to place a \$1 million contract with Scholastic on the board agenda. It was pulled when a board member questioned it. A couple of months later, in April 2017, the board approved a two-month contract for Scholastic to supply classroom libraries for \$140,000. There are obvious ethical problems with these arrangements. I am also concerned because an outside organization has brought in the former superintendent of Knox County schools to work with MNPS. He is now attending all executive leadership meetings. According to Knoxville board members, this man "left a trail of disaster in his wake." Knoxville colleagues maintain that their former

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superintendent spent too much and started too many unsustainable programs, leaving the school system in financial straits. After this superintendent left, Knox County Schools had to cut key programs to make up for the deficit. This particular superintendent is now involved in leadership work with MNPS.

I have difficulty digesting Dr. Joseph's weekly memos. They are too long and sometimes I find important information buried. I would prefer a bullet-format newsletter that is easily read at a glance. I would hope for a more transparent and collaborative budget process in the future.

Although I experienced a positive relationship with Dr. Joseph during his first year on the job, problems began the second year. The director did not always return phone calls. He didn't respond to my emails in a timely fashion and his responses often contained conflicting information (See 3.3 for specifics). The director does not provide information to all board members. He completely changed the 2018-19 Operating Budget over the weekend without talking to the Vice Chair. The director works to pit board members against one other. He set up an environment where employees were not allowed to communicate with board members. One board member touts a very personal relationship with the director where he shares information about other elected board members which maintains dissension on the board. I have spoken with the director about his sharing my confidential information with other board members. He said he would stop but it's clear the problem has exacerbated. Dr. Joseph often speaks negatively about me in public. He doesn't appear to understand the chain of command and seems to think the board reports to him. The director spins the truth so often that I no longer can trust his word. (See 3.3 for a list of inaccurate statements.) As Vice Chair, I asked the director to meet with me on a weekly basis to discuss problems so they would not become insurmountable. He refused. Dr. Joseph appears to play favorites. I tried sharing problems and concerns for over a year. The director is defensive, will not admit an error or work to correct problems in the district. Dr. Joseph is often late for meetings, lunches, and appointments. He has missed four board meetings over the past two years and two weeks: June 26th and July 11, 2017, June 26th and July 11, 2018. After a board meeting where it was implied Dr. Joseph was not following board policies, the director failed to attend the policy governance meeting. He has never responded to board concerns about not following board policies. The director played part of a misogynistic song at a principal's meeting while he displayed a picture of a man surrounded by two women who appeared to be biting the man's ear. He told principals, "This is a song that goes through my head at a board meeting." Then Dr. Joseph solicited his friends from the Metro Council to stage a public thrashing of a board member who filed a civil rights complaint against Dr. Joseph. This behavior is unprofessional and fringes on insubordination. Pitting council members against board members is unacceptable. On June 5th I requested information on student achievement data and teacher climate survey data. By June 18, I still had not received any response. When I followed up, I was told by the board liaison he was unable to attain this information. I had to go to the Chief of Staff to get simple data to complete the Director's evaluation. \$7.5 million shortfall is unacceptable. Having to seek permission from the Metro Council for \$3.5 million from the reserve fund is unprecedented. Nashville taxpayers have to live within their budgets and they expect no less from the Director of Schools. A great deal of information from Dr. Joseph's 2018-19 budget have been riddled with errors. Combing over the budget brought the errors to light. Adjustments were made over time but faith in the process was lost. The director has made many erroneous statements. Because of so many inaccuracies, fact checking became necessary. Below is a highlight of some of Dr. Joseph's inaccurate statements. 1.--On numerous occasions, Joseph stated he put a freeze on budgets last year. FACT: Almost three months after Joseph began his contract on July 1, 2016, he enacted a temporary freeze on travel in a letter dated September 20, 2016. This freeze on travel was in order to align travel with the new administration's priorities. There was NO freeze on budgets in 2017. 2.--On the board floor (3/13/18) Joseph assured the public NO new cars

Section 3. Our Organization

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had been purchased for EDSSIs. FACT: Four new 2018 Ford Tauruses arrived on 1/31/2018 and placed in the pool for the eleven EDSSI's to use in their travel across the district. The cars cost \$22,613.99 each, totaling \$90,455.96. 3.—The director denied the March 2018 freeze on budgets included paper. FACT: In a letter to principals dated March 7, 2018 Joseph stated through Chris Henson, "This freeze will include all school purchases that fall into the budget category of non-staff expenses, (software, supplies, transportation, field trips, IT purchases, equipment, etc.)." Note: Joseph eventually clarified the spending freeze. "Principals do not need approval for supplies and materials. They can order and receive them as they have always been able to do it." 4--Joseph sold his draft plan for reallocation of Title I funds (75% to high poverty schools) to principals as a plan endorsed by the school board. FACT: Joseph presented the draft plan at a budget committee meeting where board members asked questions but were not allowed to take materials home to study. The board did NOT vote on the draft at the committee meeting. 5--As an act of tightening his belt in consideration of the current year's budget freeze, the director stated he postponed hiring the Chief of Staff position. FACT: The director had already chosen his Chief of Staff; however, that candidate would not be released from her present position until the end of the semester. There is no evidence the director tightened his own belt as he attempted to balanced his overspending on the backs of schools, teachers and students. 6—The director became angry when Channel 5 and others referred to the \$7.5 million shortfall as "overspending". He pointed his finger at me and said, "I will embarrass you!" FACT: When a shortfall occurs but administration continues to spend money without adjusting budgets, it becomes "overspending". 7--The director states that he only uses his driver occasionally--when necessary. FACT: I met the director for lunch at J. Alexander's which is a 6 minute drive from Bransford Ave. He utilized his driver for that short trip. 8--Dr. Joseph has consistently stated that Nashville does not have leadership capacity; therefore, he must bring in outside consultants - many from Maryland. FACT: In 2014-15, MNPS paid \$4,311,188 for consultants as compared to 2016-17 when the costs of consultants more than doubled to \$8,639,600. 9--The director insisted the timeline for 2018-19 draft budget was not late this year. FACT: In 2016-17, the anticipated timeline for the draft budget presentation was late February, although Joseph did not unveil the budget to the committee until March 10th. This year's full draft budget was presented to the board at a committee meeting one day before the State of Schools' address on 3/28. In other words, the board saw the full draft less than 24 hours before it was unveiled to the community. 10-- On a radio show 3/18/18, Joseph stated the number of students enrolled in advanced academic courses in high school doubled this year. FACT: Considering AP classes, Cambridge and IB, the total student enrollment in advanced academic classes increased from 2,582 in 2016-17 to 3,795 in 2017-18. Although that's an increase of 46.9%, it's spinning the truth to say we have "doubled". 11—Dr. Joseph told the board that in order to get the "best and brightest" administrators from around the country, he had to pay salaries above scale. FACT: Many of Dr. Joseph's hires are friends from Prince George's County. Many do not appear to have expertise that was already prevalent within the district, therefore; the director's administration hires consultants from around the country, (also friends) to do the work. Over 52 high-level Nashville administrators have left the district due to Dr. Joseph's leadership. 12—On the board floor 6/19/2018 during the Director's Report about the MNPS Literacy Plan, Dr. Joseph and team reported the district spent \$10,000 for one outside consultant to write and edit the plan. Monique Felder assured the board that the writer and editor, Karen Babbs, attended at least some of the 18 meetings. Otherwise Ms. Babbs listened to discussions from off site. FACT: When I asked for evidence of the costs, food, lodging, etc., I discovered that Karen Babbs was paid \$11,606.25 and she never attended any of the meetings. Apparently all of her work was done off-site. There was no travel, lodging, etc. A second consultant, Jody Lentz, was also paid \$4,000 for facilitating five meetings. In addition, food and snacks cost \$4,100 for a grand total of \$19,706.25. Inaccurate information is prevalent from this administration. A how-to literacy document was written prior to Dr. Joseph's

Section 3. Our Organization

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arrival. Monique Felder previously praised the MNPS plan and reiterated on 6/19/2018 that the how-to plan would be used as a companion document. In 2013 MNPS administrators (who were paid on the MNPS salary scale) wrote the plan and facilitated the meetings. The quality of the companion document is superior and more useful than the one written and edited by Ms. Karen Babbs because it is an actual “how to” plan, complete with scope and sequence and action steps Pre-K--12. The use of outside consultants is a grave concern and has a major impact on the budget.

Literacy Plans	Length of plan	Cost of Plan	How to?	2013 Literacy Plan	~300 pages	\$0
Yes 2017-18 Literacy Plan	~ 70 pages	~\$20,000	No	This example speaks to the lack of expertise within this administration.		

Generally speaking, I’m pleased with the overall progress relative to planning and administration, board relations, and financial management. It appears that the strategic framework/plan is being implemented with fidelity. With respect to measure 3.1e (“Effectively implementing policies articulated by the Board”), we are overdue for an update on the Annenberg Standards; let’s fix that. Additionally, we need a more detailed response from Metro Legal regarding measure 3.1d (“Ensuring compliance with all legal and regulatory requirements”); let’s discuss in executive session, if needed. Meanwhile, even though board relations have been strained as of late, I gave Dr. Joseph higher ratings than his self-evaluation in three areas: 3.2a (“Maintaining an effective working relationship with the Board, characterized by open communication, respect, and trust”), 3.2d (“Engaging Board members, collectively and individually, in understanding and making sense of the organization’s environment, challenges, and potential”), and 3.2f (“Engaging the Board in meaningful strategic thinking”). While always imperfect, board relations are – in my personal experience – better than they have ever been. When I joined the board in 2012, the board clearly was an afterthought in the mind of the former director and his staff. Since Dr. Joseph’s hiring in 2016, organizational respect for the board has improved and, as a result, our role has become more clearly defined. I’m grateful to Dr. Joseph for the professional-development opportunities to which he has introduced us. Meanwhile, I’m cognizant of the need to maintain a certain level of independence. Finding and maintaining that balance always will be a challenge, but we’re basically in a good spot. With respect to measure 3.3d (“Advocating for increased resources at the local, state, and federal levels”), I will reserve my comments until Section Six of the evaluation.

Section 4. Our Community

4.1 Communications and Family Engagement

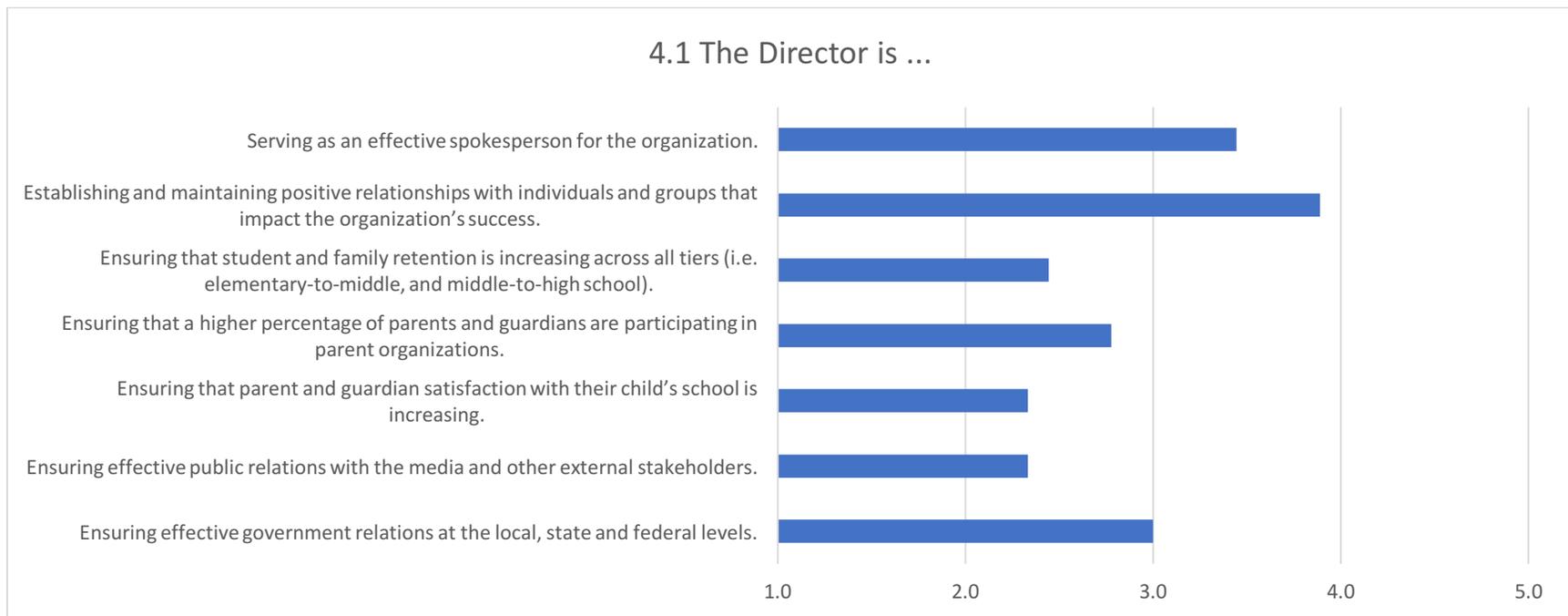
4.1 The Director is ...	Count						Avg. Rating (5-pt. scale)
	Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations	Exceptional	Total	
Serving as an effective spokesperson for the organization.	2		1	4	2	9	3.4
Establishing and maintaining positive relationships with individuals and groups that impact the organization's success.	1	1		3	4	9	3.9
Ensuring that student and family retention is increasing across all tiers (i.e. elementary-to-middle, and middle-to-high school).	2	2	4	1		9	2.4
Ensuring that a higher percentage of parents and guardians are participating in parent organizations.	1	1	6	1		9	2.8
Ensuring that parent and guardian satisfaction with their child's school is increasing.	2	2	5			9	2.3
Ensuring effective public relations with the media and other external stakeholders.	2	4	2		1	9	2.3
Ensuring effective government relations at the local, state and federal levels.	1	2	3	2	1	9	3.0

4.1 The Director is ...	Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations	Exceptional	Total
Serving as an effective spokesperson for the organization.	22%		11%	44%	22%	100%
Establishing and maintaining positive relationships with individuals and groups that impact the organization's success.	11%	11%		33%	44%	100%

Section 4. Our Community

Section 4.1 Communications and Family Engagement

Ensuring that student and family retention is increasing across all tiers (i.e. elementary-to-middle, and middle-to-high school).	22%	22%	44%	11%		100%
Ensuring that a higher percentage of parents and guardians are participating in parent organizations.	11%	11%	67%	11%		100%
Ensuring that parent and guardian satisfaction with their child’s school is increasing.	22%	22%	56%			100%
Ensuring effective public relations with the media and other external stakeholders.	22%	44%	22%		11%	100%
Ensuring effective government relations at the local, state and federal levels.	11%	22%	33%	22%	11%	100%



Section 4. Our Community

Section 4.1 Communications and Family Engagement

Do you have specific comments about the Director’s performance relative to Section Four (Our Community)?

Even though there is a lack of hard data via a survey, the verbal feedback. Dr. Joseph and or his staff also does monthly radio talks on various radio stations throughout Nashville. This is an added bonus because it gives constituents an opportunity to call in and ask questions and give feedback. This is an excellent opportunity for parents who are working during board meetings to engage in the process. It also gives the community deeper knowledge of the great things happening within our schools.

Dr. Joseph and his administration are continuing to build effective relationships in the community. Still, MNPS is in need of development and supports in the areas of communications and public relations strategies.

Dr. Joseph’s accessibility is unmatched with his willingness to speak with large and small groups ranging from parents concerned about principal changes to answering questions of the broader community via radio shows and Channel 5’s Open Line with Ben Hall. He is visible throughout the district and continues to make student/family retention a priority. This will take time and (I believe) will correlate with increased student academic progress over positive press. While there is always work to do in addressing specific student/family concerns, the improvement in the customer service center--and strong support from Dr. Sevier and Ms. Bobo in the Board Office--has greatly reduced my number of unresolved constituent complaints. The strong focus of positive/good news stories in the media by our external communications efforts was noticeable. However, they were often overshadowed by our lack of effective public relations with several media outlets with an almost equal uptick in negative media stories ranging from Title IV lawsuits to lead in the water, and do hope that an experienced Director of Communications is soon placed. External communications was also negatively impacted by weak internal communications, as we saw too often during this spring budget season. Specific examples of poor internal communications regarding the budget were: *Changes to Pre-K Fees *Changes to Title I allocations *Distribution of school-specific student-based budgets to principals, including the communication regarding elimination of legacy programs and unclear processes for requesting/granting exemption hires by principals *Repurposing seven social worker positions While Dr. Joseph did acknowledge issues with communications regarding the budget process, most of these concerns could have been avoided with better, clear and accurate communication from the start. A strong and fully implemented internal communications plan crossing all departments and beginning with the ELT is imperative if families are going to have trust in our district and its ability to educate our kids.

Vacancies with the communications area of the central have provided some challenges. Efforts are ongoing to address this.

Dr Joseph has worked tirelessly to keep all stakeholders well informed and continues to improve communications so that information is clear, concise, and accurate and that it builds a sense of trust. These efforts should, in turn, all to work toward the same goals.

MNPS communications continue to be in need of improvement, and the Director has failed to serve as an effective spokesperson for the organization. The Director has not been responsive to some media requests, and the Director and communications team have actually become needlessly adversarial with some media representatives, which does not benefit the district. Messaging has been problematic. The Director has used media interviews to publicly criticize some board members and to elevate others, which has a negative impact on board relations. One very positive aspect of communications, however, is the sharp increase in efforts to share positive stories about the work of the district. When some problems have arisen, the Director has not taken responsibility for them, blaming employees and asking them to take on media interviews that the Director himself should handle. Ultimately, the Director is ultimately responsible for the work of the district and should always be willing to answer hard questions without shirking responsibility. The Director has failed to positively engage active

Section 4. Our Community

parent groups in the district and at times seems to be actively adversarial with parents at some schools. Many parents are frustrated with the recent direction of the district and with school leadership selected by this administration. These issues should be quickly remedied, as engaged parents are perhaps MNPS' greatest untapped resource. The Director does seem to be working well with some community representatives, such as Vanderbilt officials and Nashville Chamber of Commerce representatives.

Dr. Joseph does a good job at community relationships and is not afraid of giving an interview even in the most stressful of times and around contentious issues. I've accused him of having ice water coursing through his veins at times when being on the other end of an angry conversation.

The director has a poor relationship with Channel 5. In an interview, Dr. Joseph became angry and walked away from the camera. Although the community made it clear they do not support his driver, Dr. Joseph refuses to negotiate. Although enrollment was projected to increase by 1,500 students during 2017-18, enrollment decreased by 500 students. Some parents are pulling their children out of the district. Eakin Elementary parents as well as others voiced disappointment with the principal selection process touted as transparent but clearly is not. I have spoken with Dr. Joseph on numerous occasions about parent and community concerns but the director will not adjust any part of the procedure to ensure transparency or accountability.

Generally speaking, I'm not satisfied with communications and family engagement. While I'm heartened by increased parent engagement – I gave Dr. Joseph a higher rating than his self-evaluation on measure 4.1d (“Ensuring that a higher percentage of parents and guardians are participating in parent organizations”) – I believe we are in need of improvement in four areas. Among other evidence, we need reliable survey data to benchmark, and then relentlessly re-evaluate, parent satisfaction. In addition to tracking student and teacher satisfaction, this is one of the most important areas of work. I don't fault Dr. Joseph here; he continues to clean up messes he inherited. Nevertheless, we must do better. Meanwhile, I am deeply disappointed in the state of public relations and government relations at the local level. By any objective measure, we are failing in these areas. As a former journalist, I routinely hear complaints from members of the media about complications in dealing with the school system. As a longtime political operative, I routinely hear complaints from across the Metropolitan Government – including but not limited to multiple members of the Metro Council – about complications in dealing with the school system. In politics, there's a saying: “You've got to get the talk right – and keep the talk right.” Dr. J: Right now, the talk ain't altogether right. However, I trust that you will adjust course.

Section 5. Executive Qualities

5.1 Interpersonal and Leadership Skills

5.1 The Director is ...	Count						Avg. Rating (5-pt. scale)
	Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations	Exceptional	Total	
Demonstrating effective problem-solving skills.	2			7		9	3.3
Demonstrating good judgment in decision making.	2		4	3		9	2.9
Demonstrating effective interpersonal communication skills.	2		1	3	3	9	3.6
*Demonstrating the ability to build trusting relationships.	2		2	4		8	2.7
Demonstrating the ability to balance diverging and competing points of view.	2		3	4		9	3.0
Demonstrating the ability to accept constructive criticism.	2		3	3	1	9	3.1

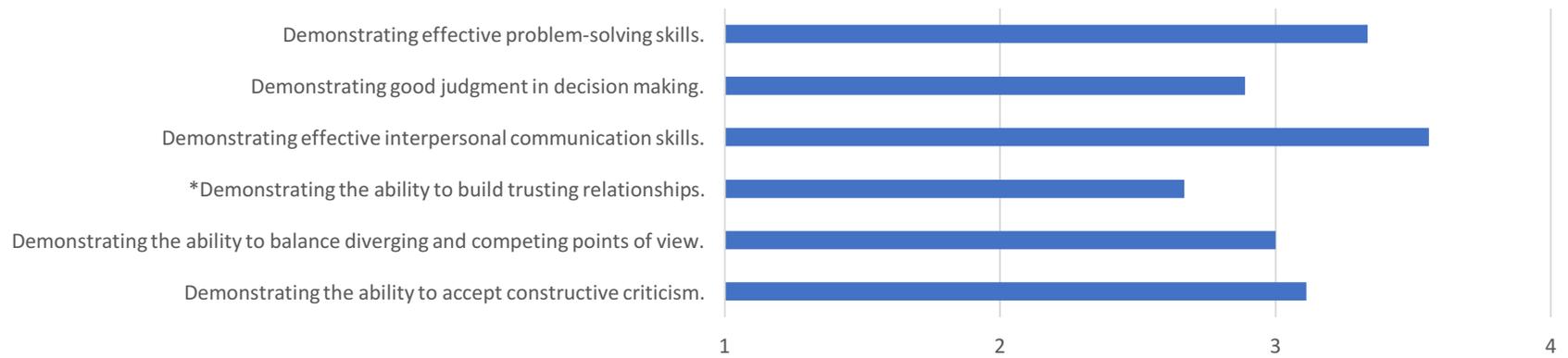
*One respondent did not answer this question.

5.1 The Director is ...	Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations	Exceptional	Total
Demonstrating effective problem-solving skills.	22%			78%		100%
Demonstrating good judgment in decision making.	22%		44%	33%		100%
Demonstrating effective interpersonal communication skills.	22%		11%	33%	33%	100%
Demonstrating the ability to build trusting relationships.	22%		22%	44%		89%
Demonstrating the ability to balance diverging and competing points of view.	22%		33%	44%		100%
Demonstrating the ability to accept constructive criticism.	22%		33%	33%	11%	100%

Section 5. Executive Qualities

Section 5.1 Interpersonal and Leadership Skills

5.1 The Director is ...



Do you have specific comments about the Director’s performance relative to Section Five (Executive Qualities)?

I believe Dr. Joseph can be too trusting. He appears to see the good in everyone and he wants to believe that everyone wants to see him succeed. Unfortunately, there is a disconnect. I believe there are those that struggle to connect his success with the success of the students we serve. He makes excellent decisions as it relates to executing the strategic plan, especially in prioritizing what needs to be done to meet our goals. He is deeply vested in the work. He consistently asks for feedback and readjusts if he decides to do it his way and it "somehow" isn't successful. This is most prominent during those big decisions as to whether or not he should close schools, for instance. His reasoning is sound but his confidence in his staff can be a bit too high at times. To recover, I've witnessed him take complete control of the situation and complete the task himself. This was observed when he terminated his Chief of Staff.

Dr. Joseph has remained professional and approachable throughout his tenure. He is a strong leader, able to make tough decisions that are evidence-based. His leadership style is consistent.

Again, Dr. Joseph’s accessibility and listening ear is appreciated in the district and city. Parents and stakeholders have been pleasantly surprised by his willingness to course correct or change a previously made decision after receiving feedback, but I recommend re-evaluating changes made due to resistance (Title 1, Social Workers, calendar dates, some legacy programs). Which groups or factors contributed to a decision that was later reversed? Were those decisions/proposals truly well vetted or was input solicited from too narrow of a slice of stakeholders? While being open to feedback and willing to pull back on a decision can be positive, it can also cause the public to lose trust in the decision making process if it happens too frequently.

Dr. Joseph's demeanor and ability to remain respectful in his engagements and communication is remarkable. His willingness to reach out to everyone (board, community, government) to garner the support needed to move the district forward is the model for what one would look for in a director.

Dr. Joseph is extremely mindful of the power of effective Interpersonal and Leadership skills and has been deliberate in the utilization of effective skills in both areas. He is confident and is willing to confer with others in making decisions without intimidation.

Please see comments under Sections Two and Three.

I have enjoyed travelling to the various Listen and Learn sessions. Dr. Joseph is really listening and not just saying he is.

The director does not accept constructive criticism. He becomes angry and is often vindictive while promoting vengeful behavior in his staff. One of his staff members has been heard yelling at employees so loudly those passing in the hall could hear her wrath. Dr. Joseph does nothing about this behavior. He does not take responsibility for his decisions. He blames administrators from Nashville, not his friends brought in from outside the state. I have lost trust in the director. He appears to hide the truth when offering conflicting information. While actions may not be nefarious, they point to inability to effectively lead.

Generally speaking, Dr. Joseph has demonstrated very good interpersonal and leadership skills. In measure 5.1c (“Demonstrating effective interpersonal communications skills”), I rated him higher than he rated himself. I find him to be an exceptional listener. However, I’m not sure he always hears us. Being director of schools is arguably the toughest job in Nashville. In this role, drowning out the noise is always going to be a challenge.

Section 5. Executive Qualities

Section 6

6.1 Assessing the Past

What were the most significant accomplishments of the Director during the past year?

I believe the Abridger work that Dr. Joseph implemented, upon his arrival, was the catalyst to the success of our students, this past year. It allowed us to produce a critical amount of work that set the foundation for MNPS. In addition, Dr. Joseph over communicates with his board members, allowing us to see on a weekly basis what is happening throughout the district. In the four years that I have personally served on the board, nor as an employee for 12 years in higher education, I've never witnessed anything like this. His transparency is impeccable. His leadership is remarkably outstanding. He also maintains a very calm demeanor in his interactions. He talks about and consistently implements strategies to improve student achievement. Dividing the district into four quadrants was a big step in building a foundation of equity across the district. We can now clearly distinguish what equity looks like within the Southeast quadrant, for instance. This helps us to better serve our student educational and social emotional needs more equitably. This, I believe, has resulted in increased math and reading scores across the district. I believe it also assisted in identifying available grant funding in order to address those needs. Dr. Joseph kicked off the year with a STEAM rollout and the Scope and Sequence reading units. This immediately raised expectations for our students as well as our teachers. It was a difficult beginning, teachers initially felt very overwhelmed, as evidenced in the teacher Listen and Learns. Eventually, teachers mastered it and complaints turned into constructive feedback. Particularly impressive is the trajectory in which the district is taking with first instruction literacy. I believe the work that Dr. Joseph has implemented will place MNPS in the forefront of literacy initiatives. Finally, the dual enrollment is extraordinary for our students. The collaboration within this program is additional evidence and it speaks volumes about Dr. Joseph's strengths. His leadership is groundbreaking for MNPS.

In no particular order: 1. The implementation of the Quadrant Superintendent system has allowed for increased efficiency. Constituent concerns are addressed appropriately and quickly. 2. Seeing more students taking Advanced Placement and certification classes/tests. 3. Earning \$23M in grants for some of our neediest schools. 4. STEAM/STEM work.

* Continued collaboration with the School Board to execute (and monitor with clear KPIs) the Strategic Plan *\$24M in grant funding for various initiatives—STEAM, etc. *Increased philanthropic dollars via NPEF *Progress in MAP scores in both reading and math * Increased support for advanced academics and industry certification by paying for required testing fees for all students *Energy savings through efficiencies *Focused plans for English Language Learners and Community Schools (Director's Reports, April 10, 2018 and June 26, 2018)

In addition to those already shared by Dr. Joseph in his supporting documentation: Attempts at building a better board Increased support and engagement from the business community The development of an actionable and measurable strategic plan that speaks to the needs of the district - students, families, teachers, principals, stakeholders Finding exceptional talent inside and outside of the district - putting people in the right seat on the bus Recognizing the leadership ability and needs of our school personnel and providing opportunities to address and support those - not just providing PD for the purpose of checking it off a list Increasing rigor in our assessment of Charter applications and improved oversight of our existing Charter partners

I am in agreement with all cited by Dr. Joseph ...highlighted by Evidence of academic gains of students Building collaborations with SEIU, MNEA, Entire Organizational Training Continued focus of Improved Communication

Section 6

6.1 Assessing the Past

Focusing on advanced academics and increasing advanced academic offerings in middle schools throughout the district has been a positive for the district. The increase in industry certifications is also a positive. However, when budget constraints became apparent, the Director cut fees for these exams first, rather than cutting such things as consultant costs, top level salaries, or Central Office travel. Unfortunately, cutting exam fees directly impacts students.

Securing millions of dollars in grant monies to support various initiatives was huge. Maintaining collaborative relationships with the various stakeholder groups associated with MNPS.

1. Providing payment for tests for Advanced Academics and certifications. 2. Increased focus on SEL

Without question, Dr. Joseph's most significant accomplishments of the past year were working with the school board to implement the strategic framework/plan, reorganizing the school system into manageable quadrants in order to better serve a community that encompasses more than 500 square miles, and working with philanthropic partners on a literacy strategy.

What were the most significant challenges MNPS faced during the past year, and how did the Director address them?

The most significant challenges this year were surrounding the budget. Dr. Joseph had to make some extremely tough decisions that angered some of his board members. He managed this process by over communicating in advance that this was going to be a tough budget season. In addition he provided evidence from two different sources to support his decisions. He held at least 10 budget committee meetings. He maintained consistent communication between the mayor and the council budget and finance chair, as well as other community stakeholders. He heard over 145 constituents at board hearings. He held radio talks where constituents were able to call in and ask questions. Lastly, he made the tough designs. At the end of the day, that proved that he was willing to make tough decisions, despite the push back, when needed. Despite any of the conversations that were held in the board room, the district was underfunded when he arrived.

In no particular order: 1. Lead in the pipes ~ working with contractors to test and replace pipes 2. A withholding of \$7M in state funding. The finance department implemented different cost-saving strategies to maintain a positive budget.

*Implementing the new ELA Scope and Sequences Dr. Joseph addressed this challenge by listening to teachers and ensuring material were ordered in time for 2nd, 3rd & 4th quarters. I have checked in with various school leaders/teachers and consistently hear that strongest teachers really like the units and that students are growing. • Budget Shortfalls due to lower than projected enrollment Director instituted a spending/hiring freeze but should have been addressed sooner *Communications –addressed in 4.1 comments

Communications - currently addressing Financial shortfalls - re-prioritized the budget

Negative innuendos from many sources along with unfounded accusations

Financial issues have been the greatest challenge this year. The district is facing an unprecedented \$7.5 million shortfall and is expected to over budget by at least \$3.5 million this fiscal year. The Director has addressed financial challenges poorly. First, the Director learned about the shortfall in fall (around October), but did not inform the board about the shortfall or take any steps to address it until late spring. The shortfall was balanced primarily on the backs of students. Schools suddenly lost money this spring that was placed in their school budgets last year, and the district cut supplies, such as toner and paper, from schools. The district also cut money from end-of-year school celebrations, school plays, etc., and curtailed professional development starting in February. As part of this year's budget discussions, the Director also

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proposed cutting social workers and our free and reduced lunch program. The Director made these cuts all while maintaining his own personal driver, while continuing to travel, and while advocating for pay raises for himself and other administrators already making extravagant salaries. At the very least, the optics of this were terrible. Whatever is left of the shortfall after the district reconciles savings from the budget freeze will come out of the MNPS fund balance (in other words, our savings account), but we will not know how much of the shortfall remains until the budget is reconciled. Planning remains poor. Contracts are brought to the board either after work has been performed or at the eleventh hour, only weeks before vital programs are to expire. Board members are told that they will disrupt the work of the district (or as one board member put it, “hold the district hostage”) if we do not vote for last-minute contracts. Staff describe the operations of the district as dysfunctional. They report that meetings are frequently cancelled, the new administration can’t seem to properly execute purchase orders, and contract procurement continues to be a problem. Please see other comments under the "Financial Management" section.

Having to scale back plans to better our middle schools due to financial constraints was disappointing. We know that our middle schools are our weakest points in MNPS.

\$7.5 Million shortfall When I called for an audit to investigate district spending, the director spoke in public as though he supported the audit, but behind closed doors, he was not supportive of my call for an audit.

Dr. Joseph began the 2017-18 school year under criticism from teachers over new ELA requirements, but he recovered over time. I believe this was primarily a failure of internal communications and it needs to be addressed through a restructuring of the school system’s communications division.

Have any legal, ethical, or governance issues arisen with regard to the operations of MNPS? If so, did the Director adequately address them?

Yes the BEP litigation ensued and there was a sexual harassment law suit filed. Dr. Joseph's legal team is evaluating the costs associated with the BEP litigation. As it relates to the sexual harassment claim, the human resources department investigated the cases, made recommendations, and provide certain safeguards to protect the persons reporting, identities.

1. There was an increase in budget-related questions this year that caused an audit to take place. We are still awaiting the findings of the audit, but all current documentation supports Dr. Joseph 2. Sexual harassment/molestation protocols have been questioned after several incidences were brought to light. Trainings took place to ensure faculty and staff have a thorough understanding of their role in reporting.

Sexual Harassment Issues in central office--Dr. Joseph appropriately reported, investigated and acted while being sensitive to protect identities. Accusations by two board members in mishandling spending/procurement practices—audit is underway and as of last check with Mark Swann, the report is almost complete. An investigation is underway due to call in tips. Director and staff have handled cooperatively.

BEP Suit - providing a fiscal assessment of impact Sexual Harassment allegation against key staff member - handled through proper channels with HR

The Director has been forthright in confronting any issues that may have arisen

A slew of ethical and governance issues have arisen this year, as detailed in previous comments. The Director has attempted to sidestep questions about issues and responded by trying to shame, marginalize, and silence board members who have publicly raised the issues. The Director frequently fails to follow board policy (both prior policy and the new policies adopted in December 2017 and January 2018). I held a

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Governance Committee meeting to address our new policies and to ensure that the Director and the board were on the same page with regard to expectations, but the Director did not attend.

I do not think that there were any malicious errors made in regard to the operations of MNPS. And to shine a light on that, the board requested an audit from Metro Legal. It is currently in process.

\$7.5 million shortfall. Going into the reserve fund to consolidate \$3.5 million shortfall. These are unprecedented problems of this administration. Dr Joseph does not follow many board policies. I asked for a governance meeting to discuss policy violations. Dr. Joseph did not attend the meeting nor did he send information about why he did not attend. Points that I have brought up on the board floor follows.

1. Consider ceasing piggyback contracts immediately. Taxpayers deserve to see full transparency on all current contracts that resulted from piggybacks contracts.
2. It's imperative that the RFP process is followed without exception. Revisit policy 2.800. Expenditure of Funds, "No expenditures shall be made except on an approved purchase order or contract."
3. In policy 2.805 "Purchases made by anyone not authorized by the appropriate officials shall become the personal responsibility of the persons making the purchase agreement. The board will not, under any circumstances, be responsible for payment for any materials, supplies or services purchased by unauthorized individuals or in an un-prescribed manner."
4. Revisit policy 2.805 "The school system will purchase competitively and seek maximum educational value for every dollar expended. Authorization to purchase shall be provided by the board."
5. 2.808 states" All purchases made by the school system shall be by purchase order or formal contract, and no purchase shall be made nor payment approved unless covered by an approved purchase order.
6. Vendor Relations 2.809: "Each order will be placed on the basis of quality, price and delivery. Past services will be a factor, if all other considerations are equal. No person officially connected with or employed by the school system will be an agent for or have any financial compensation or reward of any kind from any vendor for the sale of supplies, materials, equipment or service."
7. TSBA recommends board approval for contracts and expenditures over \$25,000. I recommend we reconsider TSBA's recommendation rather than the \$100,000 cap currently in practice.
8. Revisit 2.806 "The lowest and or best bid shall be accepted, provided the purchaser reserves the right to reject any or all bids or any part of any bid."
9. Revisit Comparability of Services 2.300 "A system wide salary schedule is adopted annually." I recommend any salaries not in alignment with salary schedule be rectified immediately.

Dr. Joseph never responded to these allegations nor suggested he would conduct business in accordance with board policies. Since allegations of impropriety are now on the table, one would expect the director to ensure transparency to the board and taxpayers yet piggy-back contracts are still being utilized. Lack of sufficient planning is often used to justify no-bid contracts, piggybacked contracts, circumventing board approval.

Dr. Joseph took swift and decisive action on sexual harassment allegations. Separately, we are awaiting additional feedback from Metro Legal regarding measure 3.1d ("Ensuring compliance with all legal and regulatory requirements"). Meanwhile, I'm deeply troubled and confused by Dr. Joseph's comments in the self-evaluation that he is "evaluating the costs associated with the legal suit initiated by the Board with the State ... since the dollars were not originally allocated for this purpose." The board's decision in October 2017 to join Shelby County Schools gave the administration ample time to budget accordingly for the cost of litigation prior to the FY2018-19 fiscal year. On May 17, Metro Legal informed the board that we have, to date, incurred one-time legal expenses of \$52,341.73 – in pursuit of potentially \$80 million in recurring funding that the State has failed to provide. If the administration wishes to question the cost of this litigation, then the board may be forced to cut salaries and contracts – and open a broader discussion with our appropriating authority, the Metro Council, which asked for and encouraged the current legal dialogue.

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6.2 Looking to the Future

What are the most important organizational priorities for the Director in the year ahead?

It is going to be critical that Dr. Joseph continue to focus on student achievement. The communications team should be overhauled, completely. so much just is not happening, two years in. This is outside of Dr. Joseph's personal communication. The district communication strategy is lacking severely. The phenomenal work that Dr. Joseph is producing is not being displayed publicly as it should and deserves to be. I believe this is his greatest weakness. Furthermore, it is hoped that he can rebuild board collaboration so that we can continue to produce great work.

1. Increasing growth and proficiency scores throughout MNPS 2. Increasing the equitable distribution of resources throughout MNPS

Accelerating the work (student growth in both reading and math) with limited funding. Hiring Director of Communications and Family Engagement Making programmatic decisions based on outcome of ROI work Making consolidation/closure decisions regarding under enrolled schools Attracting and retaining talent at all levels

Communications Government Relations Role

Providing adequate resources for our district Continued focus on becoming the fastest growing urban district in the nation

1. The Director must address the crumbling employee culture within the district. Otherwise we will continue to lose qualified and experienced staff members. 2. The Director must follow board policy. 3. The Director must address district overspending and align spending with district priorities. 4. The administration engage in better planning on many levels. Board members should not be expected to act as a rubber stamp with regard to contract approval.

Increasing the percentage of children who can read on grade level is first and foremost. Addressing the chronically absent issues in certain populations/schools.

Follow board policies. Stay within the budget and stop overspending.

Dr. Joseph's most important organizational priorities in the year ahead involve continued implementation of the strategic framework/plan and driving accompanying progress in key academic measures.

What are the most important leadership challenges for the Director in the year ahead?

The most important leadership challenges in the year ahead are directly related to board members and their ability to allow him to do his job. If they are in the way, serving as a hinderance, he can't lead and students will not achieve.

Supporting & developing the HR and Communications Departments with inadequate funding.

Building (and some rebuilding) relationships with Board members as two will definitely be new. Communications strategy

Ensuring that his key leadership staff - the Chiefs - are ALWAYS PREPARED to address questions regarding anything presented from their area. It is disheartening when a question is asked and the answer is "maybe"; "i'm not sure"; "I would have to look that up". Dr. Joseph has got to force greater ownership and accountability among his leadership!!!

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Development of positive relationships with new Board members following the elections Working with new Mayor Balancing the many roles that accompany this work

The Director and his top level administrators must adopt an outward mindset themselves if they want to see change in the organization. No amount of Arbinger staff training will make up for unprofessional or vindictive behavior by top leaders. Also, the Director must be responsive, forthcoming, and completely honest with board members.

MNPS will have another difficult budget season coming up in this next school year so meeting that challenge will be big. Also, he will have some new board members after the August Election as well as a new board chair to work with

1. School and central office climate. 2. Over 52 high level administrators have left the district. I don't know how many high level educators have left. Study the data to discover why people are leaving. 3. Appropriate Planning: The director does not plan sufficiently. This is demonstrated by bringing contracts to the board at the last minute and convincing the board that delaying approval will slow down district progress. Additionally, it's problematic when the director brings contracts to the board for approval AFTER the work has been completed. Teach for America and Educational Solutions Services are only a few example of this behavior. In both examples, the work was completed before the contract was placed on the consent agenda.

One of Dr. Joseph's most important leadership challenges in the year ahead is, as he indicated in his self-evaluation: "Balancing the district budget in the midst of declining funding." The declining funding that he mentions is the result of decreased state investment, which is why his comments relative to measure 6.1c are so vexing and disappointing. Meanwhile, the administration has failed – arguably for decades – to effectively make the public case that we are a chronically under-funded school system. This failure of leadership can end on Dr. Joseph's watch, but it will require extraordinary courage and strategic thinking.

What are the most important professional-development goals for the Director in the year ahead?

Again, professional development is going to be directly related to b hard relations. We will have a different board. He will have to establish a new team and get us all on the same page again.

Dr. Joseph wants to continue developing relationships with State legislators.

PD work in how to create unified vision with city and state leaders to fund, staff and execute on the strategic plan.

Continue to be actively engaged with National Schools and School board organizations. It is clear that Dr. Joseph's relationships have been the conduit for the support the district has received (24M in grants) and desire to be connected with MNPS from so many organizations. Continue to work on relationships with local and state government officials - the challenges we face are ever present - we need to remain vigilant

Continuation of keeping all focused on the Strategic Plan with so many changes in staffing Keeping all recommended instructional programming consistent across the district and the continued improvement in School culture and Climate

First and foremost, the Director must effectively address problems with district culture.

Working with the Metro Council and the possibility of a new mayor and vice mayor in 2019. We may also have many new state legislators in the upcoming November elections.

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1. Self-reflection 2. Learn how to work effectively with board members 3. Learn that the director answers to the board-not the other way around. 4. Perhaps TSBA could work with the director for a deeper understand of the policies adopted by the board. After a board meeting where it was implied Dr. Joseph was not following board policies, the chair of the policy governance committee called a meeting to discuss specific policies in question. The director failed to attend the policy governance meeting. He has never responded to board concerns about not following board policies.

In the year ahead, Dr. Joseph's most important professional-development goals should be addressing the soft spots in this initial evaluation and also engaging better counsel to help guide the work ahead. Being director of schools is like running a small city. You need good advice and good advisors around you. Without it, the entire organization suffers. This can be fixed.

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