
ATTORNEY CLIENT PRIVILEGED

The following report was prepared on behalf of Gregory, Doyle, Calhoun & Rogers, LLC

DEKALB COUNTY SCHOOL DISTRICT
OPERATIONS INQUIRY

The Young Group, LLC was retained by Gregory, Doyle, Calhoun & Rogers, LLC, board attorneys for the Dekalb County School District (DCSD) to conduct an independent inquiry regarding the hiring and promotion practices of employees to executive positions as well as distribution of CARES ACT funds within the district.

Background:

An independent inquiry of the hiring and promotion practices of employees to executive positions as well as distribution of CARES ACT federal funds was requested based on concerns the DCSD Board of Education (BOE) expressed.

Specifically, the DCSD BOE expressed concerns that individuals were being promoted to executive level positions without being presented to the DCSD BOE for approval. The DCSD BOE had concerns that CARES ACT federal funds had been distributed without proper authorization and/or were mishandled.

Scope:

During the time frame of 03/06/22 - present, 13 staff members were interviewed. Those interviewed included executive management, directors, managers, and specialists from: Superintendents Office, Human Resources, Finance and Office of Continuous Improvement & Accountability. The investigation encompassed the interviews, review of emails and documents received from DCSD staff.

Key Observations:

- With respect to the promotion of Interim Chief Financial Officer (I/CFO) Masana Mailliard, to the position of Deputy Chief Financial Officer (Dep CFO), interviews revealed DCSD BOE policy and procedures were not followed by Chief of Staff (COS) Antwyn Brown.
 - I/CFO Masana Mailliard was not selected by Superintendent Cheryl Watson-Harris as the candidate for the Chief Financial Officer (CFO) position to be approved by the DCSD BOE nor was she presented to the board for the Dep CFO position.
 - Interviews revealed, COS Antwyn Brown verbally approved Masana Mailliard to Karen Beadles, Director Total Rewards for the position of Dep CFO without prior approval from Superintendent Watson-Harris or presenting Mailliard to the DCSD BOE for approval.

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- As Chief of Staff to Superintendent Watson-Harris, COS Brown knew the direct placement of Mailliard without DCSD BOE approval was contrary to existing DCSD BOE policy and procedures which require DCSD BOE approval.
 - With respect to the promotion of Associate Superintendent for Continuous Improvement Oliver Lewis, to the position of Chief Continuous Improvement and Accountability, interviews revealed DCSD BOE policy and procedures were not followed by COS Antwyn Brown.
 - Contrary to policy COS Brown approved Oliver Lewis for the position of Chief of Continuous Improvement and Accountability without prior approval from the Superintendent Watson-Harris or presenting him to the DCSD BOE for approval.
 - An Organizational Restructuring Hiring Request (ORHR) form was completed for Oliver Lewis to be moved from Associate Superintendent for Continuous Improvement to Chief Continuous Improvement and Accountability effective 10/01/2021 and approved on 11/2/2021 by COS Brown, and subsequently by CFO Burbridge and Interim Chief Human Resources Officer (I/CHRO) Michelle Jones on 11/09/2021.
 - Subsequently Lewis' emails stated he was a Chief in the division, staff started questioning how Lewis became a Chief without DCSD BOE approval. At which time it was brought to the attention of Superintendent Watson-Harris who ordered Lewis to be placed back in the system to his DCSD BOE approved position of Associate Superintendent for Continuous Improvement.
 - Following Superintendent Watson-Harris' inquiry into the matter, COS Brown initiated a reversal of Lewis' promotion.
 - As Chief of Staff to the Superintendent Watson-Harris, COS Brown knew the promotion and salary increase for Lewis was contrary to existing DCSD BOE policy and procedures which require DCSD BOE approval.
 - A review of executive level positions for the periods of FY2020 – 2021 and FY2021 - 2022 was conducted and the above two matters were the only two discovered as not having been brought to the DCSD BOE for approval.
 - With regard to the distribution of CARES Act federal funds, interviews revealed the DCSD procedures were not followed in relation to a number of disbursements to individuals.
 - COS Brown reviewed supplemental request forms but did not advise Superintendent Watson-Harris of which individuals or amounts individuals would be receiving.
 - COS Brown was aware that Shaun Thompson, Director of Title 1 was responsible for overseeing all federal funds and all requests were to be approved by her prior to disbursement and did not inquire from requestors whether the forms had been approved by Director Thompson prior to disbursement.
 - 34 Supplemental request forms were not approved by Director Thompson prior to disbursement. (24 to HR employees, 6 to IT employees and 4 to finance employees).
 - 6 disbursements to HR employees approved by I/CHRO Jones were in the amounts of \$5,000.00 - \$10,000.00 which did not have Superintendent Watson-Harris and Director Thompson's approval, during the time period of 6/9/2021 – 6/14/2021.

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- Superintendent Watson-Harris did not receive any notification from COS Brown of the requests for disbursements of CARES Act federal funds to individuals or the amounts of money approved during the time period of 6/9/2021 – 6/14/2021 and was not made aware until after the fact.
- The I/CHRO Jones did not submit the required information or documents to Shaun Thompson, Director of Title 1 for approval prior to disbursement of funds.

Supporting information:

Masana Mailliard Position Change:

An interview with Superintendent Watson-Harris was conducted on April 26, 2022. Superintendent Watson-Harris did recall the promotion of Mailliard but wanted to review her records and notes before responding to the exact circumstances surrounding her promotion. Superintendent Watson-Harris was terminated from her position immediately following the interview and was subsequently unable to provide any details regarding Mailliard's promotion. However, Superintendent Watson-Harris did say that COS Brown as the Chief of Staff is allowed to approve items on behalf of the Superintendent's office. He reviews the majority of the requests that come to the Superintendent's office and has permission to sign off on a variety of matters. He signs his name, not Superintendent Watson-Harris' name. Superintendent Watson-Harris said her leadership style to date is much more cautious than it used to be. She does not sign anything that COS Brown has not reviewed prior to her receiving it. COS Brown brings matters to Superintendent Watson-Harris that require her immediate attention (i.e., red flags) or she is required to sign. Superintendent Watson-Harris acknowledged that she supervises 16,000 people in the DCSD, and it is ultimately her responsibility to know what was going on but trusted in her staff to do their jobs correctly.

The COS, Antwyn Brown was interviewed on 04/22/2022 and stated that his duties are to serve as the designee on behalf of the DCSD Superintendent and BOE for internal matters and external matters as a liaison. Other duties assigned are to directly oversee and supervise public safety, internal audits, the DCSD BOE office and administration.

COS Brown was aware of the DCSD BOE policies regarding hiring and promotions. COS Brown stated that any hiring or promotions for Director positions and above or individuals with relatives in the district require a BOE conference and BOE approval. He advised policy prior to 10/2021 stated executive director and above, but the BOE amended it in 10/2021 to Director and above required BOE approval. COS Brown advised if it is a cabinet or executive level position the Superintendent has to approve it and then the BOE approves it. COS Brown stated the Superintendent makes the presentation to the BOE and may ask additional staff to provide information regarding the candidate. He said that no one gets a director or above position without the Superintendents approval first.

COS Antwyn Brown was aware that Mailliard was one of three candidate's submitted to the Superintendent for an interview for the CFO position. Mailliard was not the candidate selected by Superintendent Watson-Harris to be presented to the BOE for approval as the CFO.

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COS Brown knew Mailliard was not presented to the BOE for the Dep CFO position on the same day the CFO position went to the BOE. COS Brown recalled the Superintendent having a conversation with Mailliard and stating that she was highly regarded but not telling her she was being appointed to the Dep CFO position. COS Brown had a conversation with CFO Burbridge regarding Mailliard and discussed grooming her plus her experience and knowledge base would work well for the future CFO position. COS Brown said CFO Burbridge did not ask about any requirements for her to be put into the position. COS Brown did not advise CFO Burbridge to prepare her to be presented before the board. COS Brown said he has not seen, nor does he have a copy of an ORHR form being completed for Mailliard's position change.

According to emails exchanged with Director Beadles and COS Brown, Director Beadles asked COS Brown if Mailliard should be put in the Dep CFO position. When asked about the email exchange, COS Brown said he "probably" had a conversation with CFO Burbridge and Superintendent Watson-Harris regarding Mailliard. COS Brown then approved Mailliard for the Dep CFO position. In October 2020, COS Brown was also serving as the Interim CHRO, which is why Director Beadles came to him regarding the status of Mailliard's position. COS Brown said the Superintendent never mentioned getting Mailliard on the BOE calendar for the Dep CFO position.

I/CHRO Michelle Jones was interviewed and stated that the promotion of Mailliard pre-dates her starting in the position of I/CHRO. I/CHRO Jones was onboarded as the I/CHRO in November 2020. On I/CHRO Jones' second weekly report dated 12/03/2020, as a division chief, under the section "Please discuss any red flags", she listed the Dep CFO situation as a red flag. She stated, "Position documentation for dep CFO". I/CHRO Jones thought the team was looking for the documentation for the Dep CFO position due to it being a verbal approval because they had to place CFO Burbridge in the CFO position. I/CHRO Jones does not recall ever getting the documentation for Mailliard's approval. She advised the documentation should have been in the board minutes/directives/ORHR form and was not in any of those documents.

CFO Burbridge was interviewed on 03/06/2022 and a follow up interview on 04/21/2022. CFO Burbridge stated that the Dep CFO position was created as part of the reorganization plan by his predecessor and approved by the BOE during the reorganization plan on 03/19/2020. The position was approved on 03/19/2020 but not Mailliard nor was there an ORHR form submitted for Mailliard when she was moved to the position of Dep CFO.

During CFO Burbridge's first week in the district and in his position, he had conversations with COS Brown who stated one of his tasks was to groom Mailliard so that she would be ready to become CFO in the future. COS Brown said the organization thought highly of her but thought additional seasoning as a Dep CFO would be good for her. Conversations between COS Brown and CFO Burbridge were had discussing if Mailliard would need to be reinterviewed for the Dep CFO position being that she just went through the interview process for the CFO position. They did not discuss presenting her to the BOE for approval in the Dep

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CFO position. CFO Burbridge had a conversation with Superintendent Watson-Harris regarding Mailliard in which she expressed positive feelings about her, but nothing about her position or title.

CFO Burbridge said COS Brown was the I/CHRO at the time and was the decision maker on Mailliard being placed in the Dep CFO position. CFO Burbridge was unaware of any issues regarding Mailliard being in the position until this year. CFO Burbridge stated during the time Mailliard was placed in the Dep CFO position he was not familiar with the policy regarding promotions because he had just been hired. CFO Burbridge knew that Chief positions had to go to the BOE for approval, because he had just gone through the process. CFO Burbridge is now aware of the policy and said that it had been expanded in 2021 to include a director position or higher has to be approved by the BOE. CFO Burbridge stated the Dep CFO position was not posted and no other candidates were brought forward as possibilities for the Dep CFO position.

Masana Mailliard was interviewed and advised that she interviewed for the CFO position and was told by Superintendent Watson-Harris that she was taken before the BOE as one of the final two candidates for the CFO position and did not receive it in October 2020. Mailliard said Superintendent Watson-Harris told her that she would be moved to the Interim Dep CFO (not the Dep CFO) position due to another candidate being selected and approved as the CFO.

In November 2020, CFO Burbridge advised Mailliard that she was no longer the Interim Dep CFO and was now the Dep CFO and does not know who approved the move or if it was presented to the BOE for approval for the Dep CFO position.

Mailliard and Latricia Butler, Classification and Compliance Manager, provided the email chain date range 10/16/2020 – 10/20/2020 of the exchange between Director Beadles, COS Brown, and Butler regarding questions addressed to COS Brown of what Mailliard's position should be. COS Brown requested to discuss it with Director Beadles at a later date. (See attachment 1)

Conclusion of Mailliard Position Change:

Interviews determined that while the position of Dep CFO was created during the reorganization plan, which was approved by the BOE on 03/19/2020, Mailliard was never presented to the BOE for approval for the Dep CFO position according to BOE policy. COS Brown appointed Mailliard to the position of Dep CFO without the approval of Superintendent Watson-Harris or the DCSD BOE. The procedure of creating an ORHR form for position placement or title changes does not appear to have been completed nor could an ORHR form for Mailliard being placed in the Dep CFO position be located. The documents for Mailliard's promotion likely do not exist due to COS Brown giving verbal approval to Director Beadles. COS Brown was aware that according to DCSD BOE policy during 2020, any position of executive director or above would require DCSD BOE approval and amended in 2021 to a director position or above would require DCSD BOE approval. The procedure for posting the vacant Dep CFO position was not executed due to Mailliard being placed into the position.

Oliver Lewis Promotion and Compensation Change:

An interview with Superintendent Watson-Harris was conducted on April 26, 2022. Superintendent Watson-Harris did recall the promotion of Lewis. Superintendent Watson-Harris contacted the former COS, Ramona Tyson to get her opinion about promoting Lewis. Tyson supported the promotion. Superintendent Watson-Harris spoke with board members about him prior to submitting Lewis for the position, therefore, she believed she could recommend him to the BOE directly as an appointment and obtain BOE approval. Superintendent Watson-Harris presented Lewis to the board for the position of Associate Superintendent for Continuous Improvement and was approved by the BOE on 01/11/2021.

During a pay parity assessment, I/CHRO Jones realized that Lewis' salary was much lower than other Associate Superintendents and brought it to Superintendent Watson-Harris attention. I/CHRO Jones realized that two divisions approved in the reorganization had not been created in the system, which affects budgets. I/CHRO Jones asked Superintendent Watson-Harris if Lewis should be moved to the Chief title and Superintendent Watson-Harris advised her not to, because Superintendent Watson-Harris has to get BOE approval for Lewis to be a Chief.

In the interim, while creating the divisions in the system, I/CHRO Jones entered Lewis' name in the Chief title as a place holder in order to set up the division. Superintendent Watson-Harris said she was never notified by I/CHRO Jones that she needed to put a name as place holder into the title to create a new division in the system.

Subsequently Lewis' emails started saying he was a Chief, people started asking questions about his title, and it was brought to Superintendent Watson-Harris' attention. Superintendent Watson-Harris asked I/CHRO Jones about it and told her that they have to meet to get additional information in order to correct it as well as bring it to the BOE's attention. Superintendent Watson-Harris did not authorize a different title for Lewis.

Superintendent Watson-Harris spoke with COS Brown, and he informed her that he approved the change in title. Specifically, Superintendent Watson-Harris did not approve the Chief title that I/CHRO Jones entered into the system. COS Brown later advised Superintendent Watson-Harris that he told I/CHRO Jones to change Lewis' position back from Chief Continuous Improvement and Accountability back to Associate Superintendent for Continuous Improvement Officer.

At the time of the interview, Superintendent Watson-Harris was not aware that Lewis' salary was still at a Chief salary level.

COS Brown was interviewed and acknowledged that on 01/11/2021, Lewis was approved by the BOE for the position of Associate Superintendent for Continuous Improvement. On 11/2/2021, COS Brown approved Lewis being moved from Associate Superintendent for

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Continuous Improvement to Chief for Continuous Improvement to be effective 10/01/2021 without the approval or knowledge of Superintendent Watson-Harris or the DCSD BOE.

COS Brown stated he was under the impression from Superintendent Watson-Harris and I/CHRO Jones that during Lewis' appointment to Associate Superintendent for Continuous Improvement in January that Superintendent Watson-Harris had laid out her plan to change the Office of Continuous Improvement and Accountability to the Division of Continuous Improvement with the BOE. COS Brown explained that due to Superintendent Watson-Harris' plan to create a new division, an Associate Superintendent cannot oversee a division and only a Chief can, therefore he approved the ORHR form to change Lewis' title and salary rate. The salary rate was changed to coincide with the position Lewis was being moved to.

COS Brown stated that people began asking questions about Lewis becoming a Chief. The BOE advised Superintendent Watson-Harris about the situation. COS Brown said that once Superintendent Watson-Harris found out about it she asked that Lewis' title be changed back to his BOE approved position, Associate Superintendent for Continuous Improvement.

COS Brown confirmed he approved a note written on the ORHR form stating "Per Supt./Chief of Staff change position back to Associate Supt/ @ \$186,000 until 06/30/2022. Rtn to ASP16 07/01/2022" and signed it on 01/26/2022. COS Brown confirmed the pay reflected in the note section of the ORHR form is a Chief's salary rate and not an Associate Superintendent's salary. The salary increase was not presented to Superintendent Watson-Harris or the DCSD BOE for approval. COS Brown stated he did not know if salary increases had to be approved by the BOE but was aware that title changes and promotions had to be approved by the DCSD BOE.

During the interview with I/CHRO Jones she said Superintendent Watson-Harris asked I/CHRO Jones to review Lewis' position and salary due to the reorganization. I/CHRO Jones said her understanding was that the reorganization went to the BOE for approval.

I/CHRO Jones told Superintendent Watson-Harris that due to Lewis overseeing additional departments he should be considered a division head. Division heads are Chiefs or Deputy Chiefs. Lewis' title was still an Associate Superintendent. Superintendent Watson-Harris did not tell I/CHRO Jones to list him as a chief in the system but said move forward in creating the division.

I/CHRO Jones advised that in the system when you create a new division you have to have either a Chief or a Dep Superintendent listed. I/CHRO Jones said the division was created, and a name needed to be added in the chief position as a placeholder. I/CHRO Jones put Lewis' name in the chief position without the approval/knowledge of Superintendent Watson-Harris or the BOE.

COS Brown came to I/CHRO Jones after receiving questions about Lewis' title of Chief and said to I/CHRO Jones that they needed to do something about it. COS Brown said Superintendent Watson-Harris is going to have to take it before the BOE for approval. COS

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Brown said time is of the essence. COS Brown said to I/CHRO Jones that they had to change Lewis' position back.

I/CHRO Jones said Lewis' salary was raised when he was moved to the Chief title. When he was moved back to Associate Superintendent, his salary remained at the Chief salary scale. COS Brown advised I/CHRO Jones that Lewis would continue to be compensated at the higher salary rate due to the work load he acquired, and that COS Brown would communicate it to Lewis. Lewis is still at the Chief salary rate until 7/1/2022 at which time his new contract for next year (2022 – 2023) will have his salary back at the Associate Superintendent pay scale.

CFO Burbridge was interviewed regarding Lewis and stated that he was not familiar with the position change. CFO Burbridge did not recall an ORHR form coming through for him to approve or locate any emails about it. CFO Burbridge said he would check his emails again and send what he finds, but he would be out of town for two weeks.

Latricia Butler, Classification & Compliance Manager, Division of Human Resources, provided an ORHR form and email from 11/2/2021 showing CFO Burbridge's approval of funds available for an upgrade and a "Title/Division name change" for Lewis from Associate Superintendent Accountability to Chief Continuous Improvement Officer. The ORHR form provided by Butler did not have CFO Burbridge's signature on it but said approved via email on 11/2/2021. CFO Burbridge is out of town and unavailable regarding the email prior to this writing. (See attachment 2)

An interview of Oliver Lewis Associate Superintendent for Continuous Improvement was conducted on 04/22/2022. Lewis stated his current position was an appointment by Superintendent Watson-Harris and was approved by the BOE in January 2021.

Lewis stated that I/CHRO Jones initiated moving him from Associate Superintendent for Continuous Improvement to Chief for Continuous Improvement and Accountability to equalize his role with others in the district. Lewis said I/CHRO Jones changed his title and increased his salary. Lewis did not recall I/CHRO Jones mentioning going to the BOE for approval.

Lewis said that COS Brown approved the increase in pay and title on the ORHR form. Later COS Brown told Lewis that they had to change him back from Chief for Continuous Improvement to Associate Superintendent for Continuous Improvement because the move needed to go before the BOE. COS Brown told Lewis that his salary would not be at the chief level, but it would be at a commensurate level for the duties he was doing, until he could take it to the BOE in June.

Lewis was clear that Superintendent Watson-Harris was not involved in any conversations with him regarding the change in title or salary. The conversation he had with Superintendent Watson-Harris was of her thanking him for his work and taking on the role. Lewis said he only had conversations with I/CHRO Jones and COS Brown regarding the change

in title and salary. Lewis acknowledged that his pay is higher than an Associate Superintendent but is lower than a Chief's salary.

Conclusion of Lewis Promotion and Compensation Change:

Interviews determined the promotion of Oliver Lewis from Associate Superintendent for Continuous Improvement to Chief for Continuous Improvement and Accountability did not follow DCSD BOE policy. COS Brown approved Lewis' promotion to Chief for Continuous Improvement and Accountability without the approval of Superintendent Watson-Harris or the DCSD BOE. Exacerbating the situation was I/CHRO Jones instructing her team to place Lewis' name as a place holder in the newly created division chart. COS Brown was aware that according to DCSD BOE policy during 2020, any position of executive director or above would require DCSD BOE approval and was amended in 2021 that a director position or above will require DCSD BOE approval.

CARES Act Supplement Issue:

With regard to the distribution of CARES Act federal funds, interviews revealed the DCSD procedures were not followed in relation to a number of disbursements to individuals. Investigation revealed that the appropriate supplemental request forms were completed as required, however, the procedural steps of approval were not followed.

Superintendent Watson-Harris was asked about the CARES Act federal funds money, process, approvals, and awards. Superintendent Watson-Harris said Shaun Thompson, Director of Federal Programs is the district internal CARES Act money authority and has to approve all spending of CARES Act money. She stated there are three pots of CARES Act money and described them as: CARES Act 1 – "The house is on fire" first part of the pandemic assisting school districts with transitioning to virtual learning. CARES Act 2 – The money is used for facility upgrades, technology, staffing, etc. CARES Act 3 – The most recent allotment of funds for pandemic related costs or expenses and most closely monitored by the state with stricter guidelines.

Superintendent Watson-Harris said they allocated and designed a recovery plan regarding the use of CARES Act money for the district. Each division head then created an improvement plan for the use of CARES Act money in their respective division.

Superintendent Watson-Harris issued the following directives regarding supplements:

- The creation and use of the Supplemental Request Form to request disbursements.
- Director Thompson, and finance need to approve all supplements.

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- Signatures required on the supplemental request form are of the requestor and immediate supervisor.
- A chief or deputy chief will have to get a second signature to obtain supplements for their staff members.
- The forms do not require Superintendent Watson-Harris' approval for every level of the organization or amount. Superintendent Watson-Harris signs the form if she is the requestor, immediate supervisor or it is a request for \$5,000.00 or more.
- Superintendent Watson-Harris advised that COS Brown oversees the requests and forwards the requests that warrant her signature or approval.
- Individuals will have to apply for a supplement over a certain dollar amount annually and the district would not give out lump sum payments.

Superintendent Watson-Harris said the supplemental requests in question did not go through the proper approval process. Superintendent Watson-Harris advised she was made aware after the fact of who received CARES Act supplements and the amounts received.

Shaun Thompson, Director of Federal Programs, Title I Part A was interviewed regarding the supplements. She advised that she is the point person in the district for CARES Act aka Esser Funds. She said they are broken down into three large budgets: Esser 1/CARES Act: Corona Virus Aide Relief & Economic Security, Esser 2/CRRSA: Corona Virus Response & Relief Supplement Appropriation and Esser 3/ARP: American Recovery Plan.

Director Thompson stated that her duties were to submit a plan to the state regarding use of funds, collaborate with the district division heads for their needs, ensure there are funds available to cover all the budgets requested for each division, ensure all federal/state laws and guidance are followed. She said all expenditures of the funds money come to her for approval and she will send it to finance for processing the purchase order. In regard to individual supplements; which are allowable under each grant, Thompson should review each request to make sure they are allowable, reasonable, necessary, or allocable under the grant guidelines.

Director Thompson said there have been instances where supplements were awarded without her knowledge or approval and made aware after the fact. These were supplements awarded to individuals. She said HR has created initiatives for people to earn supplements which were not reasonable and not within guidelines of using federal funds. For example, HR created a 7 question survey (not related to the pandemic) and if completed the individuals would receive \$1,000.00. Upon hearing about the survey Director Thompson called Deputy CFO Mailliard and together they contacted I/CHRO Jones to advise her that it was not reasonable to warrant a supplement based on the survey. I/CHRO Jones was advised to go through Director Thompson before issuing any federal supplements. Director Thompson said two meetings were held; one with the HR staff and a second with I/CHRO Jones in attendance plus the HR staff in which they revised the survey to ensure the request met proper requirements to make it reasonable for the supplement.

Director Thompson advised I/CHRO Jones again that initiatives or supplements regarding federal funds must go through her for approval. I/CHRO Jones believed funds allocated to her division fell under her authority, at which time Director Thompson explained to I/CHRO Jones that even though the division was awarded the budget they still had to drill down on each disbursement of the federal funds. Director Thompson advised that it is well known in the district and has been stated by the Superintendent that all federal fund usage must go through Director Thompson before using.

Director Thompson said the process for awarding supplements out of federal funds is that they are to run it through her, and this can be done via email. Director Thompson said in order to award a supplement the following process must occur:

- The requestor fills out a supplemental request form,
- They submit the form or email Director Thompson so she can check for allowability (She said she does not sign the supplement request form unless they walk it to her),
- Director Thompson sends the form/email back to the requestor advising if allowable or not,
- The requestor sends the form to HR for signature, then to the division/department chief or the Superintendent (if necessary) for final approval,
- Once approved it goes to HR for processing into the system,
- Finally finance receives it to process the payment via payroll.

I/CHRO Jones was interviewed regarding the supplements and stated that prior to her arrival (November 2020) the position, there was no form or process for requesting disbursements of the CARES Act funds and it was handled via email. She said once she became the I/CHRO, she led HR in creating the supplemental request form to track requests, vetted it through legal (Gregory, Doyle, Calhoun & Rogers, LLC) and it was approved in 2021. The supplemental request form requires multiple approval signatures, and justification. Initially, the Superintendents signature was not required on the form. I/CHRO Jones said as of fiscal year 2021-2022 the Superintendent said she is required to sign any request of \$5,000.00 or above and lump sum payments cannot be issued.

I/CHRO Jones said that when they started using the supplemental request form in 2021, they did not have a criteria established. I/CHRO Jones said they created criteria and put it on the form. I/CHRO Jones said another internal control added to the form was that a supplement has to be reviewed every fiscal year; for example, if you get a supplement one year, it does not mean you are guaranteed to received it the next year. I/CHRO Jones provided a copy of the supplemental request form. (See attachment 3) The supplement criteria listed on the form is as follows:

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- Can be a special project, assignment, or a district initiative and should align to the District's Strategic Plan
- New tasks will require additional time and accountability above and beyond the existing job duties of the employee
- Supplement can be implemented when all or part of an employee's duties are being assigned to and executed by another
- Supplement must be reviewed and approved annually
- Supplement amount may range between \$500 for seasonal project and \$10k for annual assignment
- Employee cannot receive more than 3 supplements per contract period (July 1st – June 30th of each year)
- Supplement must comply with all applicable Board policies, including GAAA.

I/CHRO Jones said the Superintendent created a form approval process to be used for any request or recommendation (not just supplements). It is the recommendation memo, which is a form showing the required approvers have signed off on the request before we submit it to the Superintendent. (Approvers are chiefs, deputy chiefs, legal, COS, BOE if needed, etc.)

I/CHRO Jones said that once the requests in question were approved, they were at the end of the fiscal year and the requested amounts had to be paid to the individuals prior to the fiscal year ending, thus the lump sum payments. I/CHRO Jones said the lump sum payment was not a typical practice but occurred due to an unusual circumstance. I/CHRO Jones stated she understands federal funds require high levels of scrutiny. I/CHRO Jones advised the lump sum amounts raised eyebrows because of the large amounts of money, but they were payments in arrears for the individuals having worked the hours earlier in the school year.

I/CHRO Jones said there is not a DCSD BOE policy specifically addressing federal supplements, it addresses general supplements. She said federal funds operate differently. They have their own set of guidelines and processes. I/CHRO Jones said she had received directives from Superintendent Watson-Harris regarding federal supplements but could not articulate the instructions provided to her, other than when you work extra hours/duties, you will be compensated per federal guidelines.

I/CHRO Jones was aware of who received CARES Act supplements and said there were two groups: The HR group and then the HR/Finance/IT group who were approved and paid. They were paid for the 2021 spring break period. I/CHRO Jones, CFO Burbridge and Chief Information Officer (CIO) Davis collaborated to approve everyone who was eligible for a supplement to determine the amounts awarded.

I/CHRO Jones was aware of the proper approval process, she used the supplemental request form, but did not send anything of \$5,000.00 or over to Superintendent Watson-Harris for signature. Each division chief signed off on each person's supplement in their respective divisions. I/CHRO Jones said they verbally made Superintendent Watson-Harris aware of all of

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the supplements disbursed after the fact. When asked if Shaun Thompson; Director of Federal Programs, Title I Part A approved the disbursements, I/CHRO Jones responded; no, Director Thompson is not a chief, deputy chief or higher. I/CHRO Jones said Director Thompson is the lead on Cares Act money. I/CHRO Jones assumed it was approved by Director Thompson due to receiving a charge code for CARES Act money from finance in order to pay the individuals because finance worked with Director Thompson regarding federal funds.

I/CHRO Jones was aware that there was a cap of \$10,000.00 per supplement issued. I/CHRO Jones advised that the three supplements paid on the same day to Karen Beadles totaling \$11,000.00 were for three different actions and three different supplemental request forms had been completed with justification for each payment on the forms.

I/CHRO Jones said the BOE made a comment that the person approving the HR supplements also received a supplement and which was not accurate. I/CHRO Jones stated that she, CFO Burbridge and CIO Davis approved their workers but did not get paid.

I/CHRO Jones provided the completed supplemental forms for 53 people who received a supplement from the CARES Act fund with the justification listed on all of the forms. Of the 53 forms the breakdown is as follows:

- Forty-one were requested by I/CHRO Jones, for HR employees ranging in payment amounts of \$500.00 to \$10,000.00. Three forms requesting \$5,000.00 and two forms requesting \$3500.00 were signed by both I/CHRO Jones and Superintendent Cheryl Watson-Harris on 12/6/2021. Thirty-four forms were only signed by I/CHRO Jones to include six requesting amounts of \$5,000.00 - \$10,000.00. Two forms requesting \$1,000.00 were not signed by anyone.
- Three forms were requested by CFO Burbridge for finance employees ranging in payments from \$500.00 to \$10,000.00. One form requesting \$10,000.00 was signed by both CFO Burbridge and Superintendent Cheryl Watson-Harris on 09/24/2021. One form requesting \$2,000.00 was signed by Deputy CFO Mailliard and I/CHRO Jones on 08/30/2021. The remaining form requesting \$500.00 was signed by CFO Burbridge and I/CHRO Jones.
- Nine forms were requested from Dr. Deborah Moore-Sanders, Interim Deputy Superintendent Equity & Student Empowerment (I/DSI) for nurses in the amount of \$3,500.00 and signed by the I/CHRO Jones, Superintendent Cheryl Watson-Harris and I/DSI Moore-Sanders on 11/1/2021.

COS Brown was interviewed about CARES Act funds regarding the use, approval process, requests, and disbursements. COS Brown stated federal funds are issued to the district, Director Thompson is responsible for all matters concerning the funds and allocates the budgets from the funds to each division within the district. He said Superintendent Watson-Harris, CFO Burbridge, Deputy CFO Mailliard and Director Thompson meet to determine each divisions budget.

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COS Brown stated each division head is required to submit a supplemental request form to Director Thompson for approval/denial before spending the money. He said it is understood in the district that you have to get approval from Director Thompson for any disbursements of federal funds.

COS Brown did not know where the supplemental request forms are kept and said he was not required to sign them. He stated he believes the Superintendent was required to sign them. He thought there was a cap of no more than three supplements that range from approximately \$3500/\$5000.00 up to \$10,000.00.

COS Brown said he has witnessed the formalization of supplements and the process is as follows:

- The division had to complete a supplement request form,
- COS Brown reviews the supplemental requests forms for approval but is not required to sign on the form
- The form proceeds to the Superintendent for approval. COS Brown believes the Superintendent has to sign the supplemental request form for any amount requested.

COS Brown does not ask if the request had been approved by Director Thompson prior to his review. He advised that he assumes the division head has taken into account the amount of money in their budget and received approval from Director Thompson for CARES Act/other federal funds.

COS Brown questioned I/CHRO Jones about the payouts. COS Brown said I/CHRO Jones used a tiering system to figure out the supplement amounts based on the work that was done. COS Brown was made aware after the fact specifically to the amounts awarded.

CFO Burbridge was interviewed regarding the supplements and stated that supplements specifically requested to be paid from CARES Act money for the finance division are requested by him as the division Chief. He stated the approval process is as follows:

- CFO Burbridge requests the supplement,
- Director Thompson reviews the request to ensure it meets the specific criteria within the CARES Act regulations,
- The chief of the requesting division signs the form,
- The supplemental request form proceeds to HR to enter into the system.

CFO Burbridge said he was made aware of issues regarding substantial amounts of money being requested for supplements and lump sums being paid out. Specifically, that \$10,000.00 had been issued in a lump sum and Director Beadles received a total of \$11,000.00. CFO Burbridge said he is not in the approval process for other divisions supplements. CFO Burbridge said other division chiefs know that Director Thompson should review the request to ensure they meet the guidelines because it is well known in the district that she oversees federal

May 3, 2022

funds, and it has been reiterated in meetings. CFO Burbridge said he is not aware of a DCSD BOE policy regarding an amount cap for supplement requests. CFO Burbridge stated he recalls requesting CARES Act money for payroll staff that worked over the 04/2021 spring break period and does not recall making any other requests from CARES Act money.

Deputy CFO Mailliard was interviewed regarding the supplements and stated all supplements require the supplemental request form. Her understanding of the process for supplements is that a division/department head has to request the supplement, the forms are sent to HR, HR is supposed to send the list of the requested supplements to Superintendent Watson-Harris for approval, if Superintendent Watson-Harris approves them, then HR creates the supplement in the system. She said that HR maintains the supplement request forms and the supporting documents.

Deputy CFO Mailliard said she was asked by the Superintendent Watson-Harris to run a report of all the supplements awarded and paid through CARES Act money. This is when both Deputy CFO Mailliard and Superintendent Watson-Harris were made aware of the supplements the HR staff received, and the substantial amounts awarded. Deputy CFO Mailliard said that once she was aware of the supplements issued to HR, she called Director Thompson and asked if she was aware of them. Director Thompson said she was not and had not approved them. Deputy CFO Mailliard said there is a cap of \$10,000.00 listed on the supplement form.

Conclusion, CARES Act Supplement Issue:

Interviews and a review of documents revealed that I/CHRO Jones requested supplements for the HR division and did not seek Director Thompson's approval for disbursement of federal funds. I/CHRO Jones did not obtain Superintendent Watson-Harris' approval for disbursement of funds of \$5,000.00 or more as required. COS Brown should have notified Superintendent Watson-Harris of potential red-flags in regard to large amounts of supplements being requested by I/CHRO Jones. COS Brown was aware that Director Thompson was responsible for federal funds and her approval was required for disbursement of federal funds but did not conduct proper follow-up with the requestors regarding the federal fund supplement disbursements.

Fw: Change Interim assignments

Karen Beadles (Total Rewards) <Karen_Beadles@dekalbschoolsga.org>

Mon 2/14/2022 2:10 PM

To: Latricia Butler (Total Rewards) <Latricia_Butler@dekalbschoolsga.org>

FYI

Karen S. Beadles

Director, Total Rewards

Division of Human Resources | DeKalb County School District

1701 Mountain Industrial Blvd. | Stone Mountain, GA 30383

678-676-0557 office

Karen_Beadles@dekalbschoolsga.org | www.dekalbschoolsga.org

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cid:image001.png@01D2E38F.696D3980

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From: Karen Beadles (Total Rewards) <Karen_Beadles@dekalbschoolsga.org>

Sent: Tuesday, October 20, 2020 9:52 AM

To: Antwyn Brown (Superintendent's Office) <Antwyn_Brown@dekalbschoolsga.org>

Subject: Re: Change Interim assignments

Good Morning,

just fyi...payroll runs Thursday at 2:00 p.m.

Thanks!

Karen S. Beadles

Director, Total Rewards

Division of Human Resources | DeKalb County School District

1701 Mountain Industrial Blvd. | Stone Mountain, GA 30383

678-676-0557 office

Karen_Beadles@dekalbschoolsga.org | www.dekalbschoolsga.org

cid:image001.png@01D2E38F.696D3980

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From: Antwyn Brown (Superintendent's Office) <Antwyn_Brown@dekalbschoolsga.org>
Sent: Monday, October 19, 2020 5:23 PM
To: Karen Beadles (Total Rewards) <Karen_Beadles@dekalbschoolsga.org>
Subject: RE: Change Interim assignments

Hey Mrs. Dr. Beadles,

Great question. Let's discuss Thursday. Thanks.

AB



Antwyn Brown

DeKalb County School District | Administrative & Instructional Complex
1701 Mountain Industrial Boulevard | Stone Mountain, Georgia 30083
678-676-0010 Main antwyn_brown@dekalbschoolsga.org
www.dekalbschoolsga.org

From: Karen Beadles (Total Rewards)
Sent: Monday, October 19, 2020 5:22 PM
To: Antwyn Brown (Superintendent's Office) <Antwyn_Brown@dekalbschoolsga.org>
Subject: Fw: Change Interim assignments

Hi Mr. Brown,

Since the appointment of Charles Burbridge effective Oct 15th, what should the placement of Masana Mailliard be? Does she return to the Manager III position or to the Deputy position?

Thank you!

Karen S. Beadles

Director, Total Rewards

Division of Human Resources | DeKalb County School District
1701 Mountain Industrial Blvd. | Stone Mountain, GA 30383
678-676-0557 office
Karen_Beadles@dekalbschoolsga.org | www.dekalbschoolsga.org

cid:image001.png@01D2E38F.696D3980

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From: Latricia Butler (Total Rewards) <Latricia_Butler@dekalbschoolsga.org>
Sent: Friday, October 16, 2020 5:23 PM
To: Karen Beadles (Total Rewards) <Karen_Beadles@dekalbschoolsga.org>
Subject: Change Interim assignments

Mrs. Beadles,

Do I change the Interim assignments for Masana Mailliard and Greg Johnson effective 10/15/2020, based on the hiring of the new CFO? If so, please respond to this email so I can make the necessary adjustments prior to the 10/30 payroll run.

Latricia L. Butler
Classification & Compliance Manager
Division of Human Resources
DeKalb County School District
1701 Mountain Industrial Boulevard
Stone Mountain, Georgia 30083
O: 678-676-0182
C: 678-984-7406
E: Latricia_L_Butler@dekalbschoolsga.org

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Salary Quote - Masana Mailliard

Latricia Butler (Total Rewards) <Latricia_Butler@dekalbschoolsga.org>

Wed 10/21/2020 2:26 PM

To: Karen Beadles (Total Rewards) <Karen_Beadles@dekalbschoolsga.org>

Good afternoon Mrs. Beadles,

The requested salary quote for Masana Mailliard is attached.

If you have any questions, please let me know.

Have a great day!

Latricia L. Butler
Classification & Compliance Manager
Division of Human Resources
DeKalb County School District
1701 Mountain Industrial Boulevard
Stone Mountain, Georgia 30083
O: 678-676-0182
C: 678-984-7406
E: Latricia_L_Butler@dekalbschoolsga.org

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□

Compensation Salary Quote

Requesting Manager/Date: KB
 Name : Masana Mailliard
 Employee Type: Promotion
 EID#: 20117980
 Position: Deputy Chief Finance Officer - 7200A0002
 Location : Finance

Compensation Use ONLY

Salary Schedule: ASP
 Anticipated Step/Salary: 01
 Scheduled Calendar Days: 241
 Salary Range: \$ 138,832.72 - \$ 184,695.49
 Anticipated Salary: \$138,832.72
 Daily Rate: \$576.07
 Prorated Salary: TBD
 Supplements: N/A

Experience:

Related Administrative Experience – 100% credit

DCSD	Interim Chief	7 months	
Total related years			1.00
Placement based on exp.	ASP01		\$138,832.72

Current Salary		\$109,147.00	
6%:		\$115,695.82	
Placement based on 6%	ASP01		\$138,832.72

*******Please note this is a tentative salary quote. This salary placement is final upon receiving verification of employment**

Compensation Signature: *Latricia Butler*

Date: 10/21/2020

DeKalb County School District

Budget Request Form - FY 2020-2021

BUDGET NAME (00011)7200 - DEPARTMENT OF FINANCE
DIVISION Finance

PERSONNEL

TYPE	GA OBJECT	TITLE	CHARGE CODE	JOB %	COUNT	SALARY	BENEFITS
				TOTAL EXPENSE		3,704,324	1,200,092
E	514800	Payroll Auditor	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	48,804	21,935
E	514800	Specialist I, Payroll (Legal)	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	57,670	23,860
E	514800	Specialist I, Vendor Registrat	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	62,748	13,623
E	514800	Specialist II, Accounting	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	73,875	27,379
E	514800	Specialist II, Contract Compliance	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	65,643	25,592
E	514800	Specialist II, Position Control	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	65,643	25,592
E	514800	Specialist II, Position Control	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	65,643	25,592
E	514800	Specialist II, Procurement	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	56,392	12,834
E	514800	Specialist, Audit P-Card	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	60,091	23,724
E	514800	Technician II, Budget	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	62,748	24,963
OTHER MANAGEMENT PERSONNEL (519000)							
E	519000	Deputy, Chief Financial Officer	100.2500.519000.00011.7200.9990.8010.050.0000	75%	0.8	139,500	38,791
E	519000	Director, Budget/Staff/Sched	100.2500.519000.00011.7200.9990.8010.050.0000	95%	1.0	118,243	36,443
E	519000	Interim, Chief Financial Officer	100.2500.519000.00011.7200.9990.8010.050.0000	75%	0.8	139,500	38,791
E	519000	Manager III, Accts Payable	100.2500.519000.00011.7200.9990.8010.050.0000	100%	1.0	116,770	36,690
E	519000	Manager III, Budget	100.2500.519000.00011.7200.9990.8010.050.0000	45%	0.5	49,116	15,767
E	519000	Manager III, Purchasing	100.2500.519000.00011.7200.9990.8010.050.0000	100%	1.0	112,894	35,850
E	519000	Legal Administrator, Contracts	100.2800.519000.00011.7200.9990.8010.050.0000	50%	0.5	50,065	16,539
E	519000	Specialist II, Accounts Payable	100.2800.519000.00011.7200.9990.8010.050.0000	100%	1.0	65,643	25,592
OTHER ADMINISTRATIVE PERSONNEL (519100)							
E	519100	Auditor, Capital Inventory	100.2500.519100.00011.7200.9990.8010.050.0000	100%	1.0	76,694	27,990
E	519100	Coord., Sch.Allotments/Budgets	100.2500.519100.00011.7200.9990.8010.050.0000	100%	1.0	113,311	35,940
E	519100	Manager I, Capital Assets	100.2500.519100.00011.7200.9990.8010.050.0000	100%	1.0	85,048	13,594
E	519100	Manager I, Capital Assets	100.2500.519100.00011.7200.9990.8010.050.0000	100%	1.0	85,048	18,464
E	519100	Senior Engineer, Systems (Fin)	100.2500.519100.00011.7200.9990.8010.050.0000	95%	1.0	102,331	32,989
E	519100	Salary Supplement	100.2800.519100.00011.7200.9990.8010.050.0000	100%	0.0	11,500	2,497
E	519100	Salary Supplement	100.2800.519100.00011.7200.9990.8010.050.0000	100%	0.0	5,000	1,086
E	519100	Salary Supplement	100.2800.519100.00011.7200.9990.8010.050.0000	100%	0.0	5,000	1,086
E	519100	Salary Supplement	100.2800.519100.00011.7200.9990.8010.050.0000	100%	0.0	5,000	1,086
E	519100	Salary Supplement	100.2800.519100.00011.7200.9990.8010.050.0000	100%	0.0	5,000	1,031

DeKalb County School District

Budget Request Form - FY 2020-2021

BUDGET NAME (00011)7200 - DEPARTMENT OF FINANCE

DIVISION Finance

PERSONNEL

TYPE	GA OBJECT	TITLE	CHARGE CODE	JOB %	COUNT	SALARY	BENEFITS
				TOTAL EXPENSE		3,704,324	1,200,092

E	519100	Salary Supplement	100.2800.519100.00011.7200.9990.8010.050.0000	100%	0.0	5,000	1,086
E	519100	Salary Supplement	100.2800.519100.00011.7200.9990.8010.050.0000	100%	0.0	5,000	1,086
E	519100	Salary Supplement	100.2800.519100.00011.7200.9990.8010.050.0000	100%	0.0	5,000	1,086

DeKalb County School District

Budget Request Form - FY 2020-2021

BUDGET NAME {00011}7200 - DEPARTMENT OF FINANCE
DIVISION Finance

PERSONNEL

TYPE	GA OBJECT	TITLE	CHARGE CODE	JOB %	COUNT	SALARY	BENEFITS
				TOTAL EXPENSE		3,704,324	1,200,092

SALARY OF CLERICAL STAFF (514200)

E	514200	Buyer	100.2300.514200.00011.7200.9990.8010.050.0000	100%	1.0	68,273	26,162
E	514200	Office Specialist to Deputy/Ch	100.2300.514200.00011.7200.9990.8010.050.0000	100%	1.0	62,864	24,988
E	514200	Assistant, Purchasing	100.2500.514200.00011.7200.9990.8010.050.0000	100%	1.0	42,392	20,543
E	514200	Clerk, Accounts Payable	100.2500.514200.00011.7200.9990.8010.050.0000	100%	1.0	43,114	20,701
E	514200	Clerk, Accounts Payable	100.2500.514200.00011.7200.9990.8010.050.0000	100%	1.0	46,910	21,524
E	514200	Clerk, Accounts Payable	100.2500.514200.00011.7200.9990.8010.050.0000	100%	1.0	34,620	7,516
E	514200	Senior Accounts Payable Clerk	100.2500.514200.00011.7200.9990.8010.050.0000	100%	1.0	44,430	9,645

ACCOUNTANT (514800)

E	514800	Accountant I	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	49,634	10,775
E	514800	Accountant II	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	61,358	24,661
E	514800	Accountant III	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	64,783	14,065
E	514800	Accounting Manager II	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	65,643	25,592
E	514800	Analyst I, Payroll	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	54,005	23,064
E	514800	Analyst I, Payroll	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	50,479	22,299
E	514800	Analyst I, Payroll	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	50,479	22,299
E	514800	Analyst I, Payroll	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	50,479	22,299
E	514800	Analyst III, Budget	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	71,160	26,789
E	514800	Auditor, Contract Compliance	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	65,643	25,592
E	514800	Auditor, Purchasing Support	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	49,634	22,115
E	514800	Auditor, Purchasing Support	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	48,804	21,935
E	514800	Clerk, Payroll	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	35,809	19,114
E	514800	Clerk, Payroll	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	37,668	19,518
E	514800	Comptroller/Treasurer	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	103,758	22,526
E	514800	Director of Financial Reporting and Cost Acc	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	108,746	23,609
E	514800	Executive Director, Accounting	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	126,119	27,380
E	514800	Executive Director, Payroll	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	126,119	27,380
E	514800	Executive Director, Procurement and Contrac	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	126,119	27,380
E	514800	Interim Manager III, Payroll	100.2500.514800.00011.7200.9990.8010.050.0000	100%	1.0	95,362	32,043



CENTRAL OFFICE

ORGANIZATIONAL RESTRUCTURING/HIRING REQUEST FORM

DATE REQUEST INITIATED November 1, 2021

SECTION 1: COMPLETED BY REQUESTING DIVISION

DIVISION	Office of Continuous Improvement & Accountability			
DEPARTMENT	Office of Continuous Improvement & Accountability	7	0	3
POSITION REQUESTED	Job Change - Chief Continuous Improvement Officer			

ATTACH THE HR-APPROVED POSITION SPECIFICATION	<input type="checkbox"/> NEW	<input checked="" type="checkbox"/> EXISTING	REPLACING: Oliver Lewis														
		EID	1	9	9	3	2	1	7	0	END DATE						

JUSTIFICATION/RATIONALE FOR REQUEST (ATTACH SUPPORTING DOCUMENTATION)

1. Change the division name from Office of Continuous Improvement & Accountability to Division of Continuous Improvement & Accountability.

2. Upgrade position & job title from Associate Superintendent to Chief Continuous Improvement Officer


Current: ASP06 - \$154,934.74

New: DPC01 - \$186,000.00

See Notes on next page.

Effective 10/1/21

DEPARTMENT POSITION WILL REPORT										7	0	3								
<input type="checkbox"/> PT	<input checked="" type="checkbox"/> FT	POSITION TYPE	<input checked="" type="checkbox"/> ADMINISTRATIVE	<input type="checkbox"/> SUPERVISORY	<input type="checkbox"/> SUPPORT	<input type="checkbox"/> TEMPORARY														
DAYS WORKED																				
<input type="checkbox"/> 180	<input type="checkbox"/> 185	<input type="checkbox"/> 186	<input type="checkbox"/> 190	<input type="checkbox"/> 192	<input type="checkbox"/> 197	<input type="checkbox"/> 200	<input type="checkbox"/> 213	<input type="checkbox"/> 244	<input checked="" type="checkbox"/> 246	<input type="checkbox"/> OTHER										
FROM FUNDING SOURCE																				
FUND	FND	FN	OB	SO	PRJECT	LOC	PGRM													
TO FUNDING SOURCE																				
<input checked="" type="checkbox"/> KEEP SAME FUNDING SOURCE																				
FUND	FND	FN	OB	SO	PRJECT	LOC	PGRM													
	1	0	1	6	4	0	2	0	0	0	0	1	0	1	7	0	3	00	0	0
<input type="checkbox"/> New Budgeted Position			<input type="checkbox"/> Re-Allocated Budgeted Position					<input type="checkbox"/> Non-Budgeted Position												
Notes: (Attach Additional Docs)			POSITION(S) TO ELIMINATE					Notes: (Attach Additional Docs)												
<input type="checkbox"/> APPROVED <input type="checkbox"/> DENIED			Division Head Signature							Date										
										11/2/21										
			Approved via email							A. Brown										

BUDGET				
<input type="checkbox"/> Date Processed	<input type="checkbox"/> Funds Allocated	<input type="checkbox"/> Funds Moved	<input type="checkbox"/> Split Funded	
POSITION CONTROL				
<input type="checkbox"/> Date Processed	<input type="checkbox"/> Funding Confirmed	<input type="checkbox"/> Responsibility Center		
<input type="checkbox"/> Pay Type	<input type="checkbox"/> Hours	<input type="checkbox"/> Salary Range		
POSITION CODE		TITLE NUMBER		
SECTION 2: COMPLETED BY FINANCE				
<input type="checkbox"/> APPROVED <input type="checkbox"/> DENIED		Chief Financial Officer Signature	Date	
		Approved via email	11.2.2021	
SECTION 3: COMPLETED BY HUMAN RESOURCES				
<input checked="" type="checkbox"/> APPROVED <input type="checkbox"/> DENIED		Chief Human Resources Officer Signature	Date	
			11.9.2021	
COMPENSATION				
<input type="checkbox"/> Date Reviewed		<input type="checkbox"/> Org Chart	<input type="checkbox"/> Qualification (133)	<input type="checkbox"/> Pay Type (805)
NOTES ** Per Supt. / Chief of Staff Change position back to Associate Supt. @ \$186,000 until 6/30/2022. Retn. to ASP 16 7/1/2022 * Andy S3 1/26/2023		<input type="checkbox"/> Allotment	<input type="checkbox"/> External Value Code (133)	<input type="checkbox"/> Exemption Status
		<input type="checkbox"/> Incumbent	<input type="checkbox"/> EEO Line Number	<input type="checkbox"/> Exemption Status (133)
		<input checked="" type="checkbox"/> Specification	<input type="checkbox"/> Salary Range (805)	<input type="checkbox"/> Duty Overlap
		<input type="checkbox"/> Pos #/Title#	<input type="checkbox"/> Retirement Category	<input type="checkbox"/> KSAs, Phys, Cond
		<input type="checkbox"/> Classification	<input type="checkbox"/> Retirement (133)	<input type="checkbox"/> Structure Alignment
		<input type="checkbox"/> Edu/Exp	<input type="checkbox"/> Group Type (133)	<input checked="" type="checkbox"/> HR Approved
		<input type="checkbox"/> Cert, Lic, Perm	<input type="checkbox"/> Calendar	<input type="checkbox"/> Web Site Update
			<input type="checkbox"/> Supervisory	
PATS MANAGEMENT				
<input type="checkbox"/> Date Processed		<input type="checkbox"/> Cit	<input type="checkbox"/> E&T	<input type="checkbox"/> VT
NOTES		<input type="checkbox"/> Ref	<input type="checkbox"/> EH	<input type="checkbox"/> TE&C
		<input type="checkbox"/> eRef	<input type="checkbox"/> GI	<input type="checkbox"/> Sec 6
		<input type="checkbox"/> Res	<input type="checkbox"/> L&C	<input type="checkbox"/> Edu
				<input type="checkbox"/> Exp
SECTION 4: COMPLETED BY SUPERINTENDENT				
<input type="checkbox"/> APPROVED <input type="checkbox"/> DENIED		Superintendent Signature	Date	

Fw: ORHR form for Oliver Lewis

Latricia Butler (Total Rewards) <Latricia_Butler@dekalbschoolsga.org>

Wed 2/16/2022 4:42 PM

To: Michelle Jones (Human Resources) <Michelle_Jones@dekalbschoolsga.org>

1 attachments (609 KB)

ORHR_Continuous Improvement_Oliver Lewis (00000002).pdf;

Mr. Burbridge's approval is below.

Latricia L. Butler

Classification & Compliance Manager

Division of Human Resources | DeKalb County School District

1701 Mountain Industrial Blvd. | Stone Mountain, GA 30083

O: 678-676-0182

C: 678-984-7406

E: Latricia_L_Butler@dekalbschoolsga.org

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□

From: Diane Gardner (Finance) <diane_gardner@dekalbschoolsga.org>

Sent: Monday, November 8, 2021 2:57 PM

To: Latricia Butler (Total Rewards) <Latricia_Butler@dekalbschoolsga.org>

Subject: FW: ORHR form for Oliver Lewis

Hey Latricia,

Don't know if I sent this one to you:

From: Charles Burbridge (Finance)

Sent: Tuesday, November 2, 2021 4:45 PM

To: Diane Gardner (Finance) <diane_gardner@dekalbschoolsga.org>

Cc: Masana Mailliard (Finance) <Masana_Mailliard@dekalbschoolsga.org>; Amelia Jefferson (Finance)

<amelia_jefferson@dekalbschoolsga.org>; Dan Copeland (Finance) <dan_copeland@dekalbschoolsga.org>

Subject: RE: ORHR form for Oliver Lewis

I approve. Thanks.

From: Diane Gardner (Finance)

Sent: Tuesday, November 2, 2021 3:40 PM

To: Charles Burbridge (Finance) <Charles_Burbridge@dekalbschoolsga.org>

Cc: Masana Mailliard (Finance) <Masana_Mailliard@dekalbschoolsga.org>; Amelia Jefferson (Finance)

<amelia_jefferson@dekalbschoolsga.org>; Dan Copeland (Finance) <dan_copeland@dekalbschoolsga.org>

Subject: FW: ORHR form for Oliver Lewis

Good Afternoon Mr. Burbridge,

The following ORHR Form needs your approval for an Upgrade and a "Title/Division name change".

*This upgrade was an executive decision and is not listed in the budget.

From: Associate Supt. Accountability **To:** Chief, Continuous Improvement Officer

Division name change: A145 Panel already updated 8/31/21

7030A0102 / 703522 Chief Continuous Improvement

DPC01 DPC01

Employee: Oliver Lewis

From: Latricia Butler (Total Rewards)

Sent: Tuesday, November 2, 2021 3:31 PM

To: Diane Gardner (Finance) <diane_gardner@dekalbschoolsga.org>

Subject: Re: ORHR form for Oliver Lewis

Please see the updated ORHR form.

Latricia L. Butler

Classification & Compliance Manager

Division of Human Resources | DeKalb County School District

1701 Mountain Industrial Blvd. | Stone Mountain, GA 30083

O: 678-676-0182

C: 678-984-7406

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From: Latricia Butler (Total Rewards) <Latricia_Butler@dekalbschoolsga.org>

Sent: Tuesday, November 2, 2021 9:18 AM

To: Diane Gardner (Finance) <diane_gardner@dekalbschoolsga.org>

Subject: Fw: ORHR form for Oliver Lewis

Good morning Diane,

Please see the attached ORHR form for approval. Mr. Brown approved the ORHR form via the email context below.

If you have any questions, please let me know.

Have a great day!

Latricia L. Butler

Classification & Compliance Manager

Division of Human Resources | DeKalb County School District

1701 Mountain Industrial Blvd. | Stone Mountain, GA 30083

O: 678-676-0182

C: 678-984-7406

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From: Michelle Jones (Human Resources) <Michelle_Jones@dekalbschoolsga.org>

Sent: Tuesday, November 2, 2021 8:10 AM

To: Latricia Butler (Total Rewards) <Latricia_Butler@dekalbschoolsga.org>; Karen Beadles (Total Rewards) <Karen_Beadles@dekalbschoolsga.org>

Subject: Fwd: ORHR form for Oliver Lewis

Please get signatures to align to approval email.
MJ

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From: Antwyn Brown (Superintendent's Office) <Antwyn_Brown@dekalbschoolsga.org>

Sent: Tuesday, November 2, 2021 5:42 AM

To: Michelle Jones (Human Resources)

Subject: Re: ORHR form for Oliver Lewis

Approved for processing.

AB

Sent from my iPhone

On Nov 1, 2021, at 11:33 PM, Michelle Jones (Human Resources) <Michelle_Jones@dekalbschoolsga.org> wrote:

For your review.
MJ

Get [Outlook for iOS](#)

From: Latricia Butler (Total Rewards) <Latricia_Butler@dekalbschoolsga.org>

Sent: Monday, November 1, 2021 1:59 PM

To: Michelle Jones (Human Resources)

Subject: ORHR form for Oliver Lewis

Good afternoon Dr. Jones,

The ORHR form for Oliver Lewis is attached. His current salary is \$154,934.74; the quote for placement as the Chief Continuous Improvement Officer is DPC01 - \$186,000.00.

If you have any question or need additional information, please let me know.

Have a great day!

Latricia L. Butler
Classification & Compliance Manager
Division of Human Resources | DeKalb County School District
1701 Mountain Industrial Blvd. | Stone Mountain, GA 30083
O: 678-676-0182
C: 678-984-7406
E: Latricia_L_Butler@dekalbschoolsga.org

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<ORHR_Continuous Improvement_Oliver Lewis.pdf>



Supplement Request Form

Human Resources Division

Supplement Criteria

- Can be a special project, assignment, or a district initiative and should align to the District's Strategic Plan
- New tasks will require additional time and accountability above and beyond the existing job duties of the employee
- Supplement can be implemented when all or part of an employee's duties are being assigned to and executed by another
- Supplement must be reviewed and approved annually
- Supplement amount may range between \$500 for seasonal project and \$10k for annual assignment
- Employee cannot receive more than 3 supplements per contract period (July 1st - June 30th of each year)
- Supplement must comply with all applicable Board policies, including GAAA.

Requestor

Employee

Name (Last, First, MI)

Name (Last, First, MI)

Position Title (Superintendents and Chiefs only)

Position Title

Requested Supplement Amount

Requested Effective Date

Scope of Work

Does the scope of work align with DCSD's Strategic Plan? *(check all goal areas that apply)*

Area 1. Student Success with Equity and Access
Area 2. Stakeholder Engagement & Communication
Area 3. Staff Effectiveness

Area 4. Culture and Climate
Area 5. Organizational Excellence
Area 6. Facilities

Key Artifacts (if applicable)

Budget Charge Code to Use:

FND FN OB PRJCT LOC PGRM FAC DIV FTR

Sign

Date

OFFICIAL USE ONLY

Supt. / Chief Approval or Denial
(Choose One)

(Date)

Effective Date:

Expiration Date:

Supplement Amount: