

case study

Strategic Decision Making in Charlotte-Mecklenburg

Reshaping Community Engagement

TregoED's critical thinking strategies helped reshape community engagement to facilitate tough decision making in the Charlotte-Mecklenburg School District.

In 2010, the Charlotte-Mecklenburg School District (CMS) faced severe budget cuts and a series of difficult decisions surrounding school closures, program consolidation, facility use and attendance rezoning. Some of the first questions that arose included:

What approach would be most effective for developing the best possible recommendations in such a difficult set of circumstances?

What approach would help ensure civility, trust and engagement with community around its decision making?

CMS turned to TregoED's Advanced Strategies Facilitation to support the effort.



"TregoED's processes gave us a great foundation for our decision making. The structure they provided helped us engage the community in thinking about the future of the district."

**Dr. Peter Gorman, Superintendent,
Charlotte-Mecklenburg**

The TregoED Process

The Board of Education and the district staff recognized immediately the importance of involving the community early in the process. Selected district staff members were specially trained in TregoED's Advanced Strategies Facilitation and were coached by TregoED experts as the work progressed. These individuals learned how to employ active listening, expert facilitation and conflict resolution to engage citizens and collect valuable input. Creating a transparent, welcoming environment allowed community members and Board members to collaborate with and learn from each other—identifying areas of concern and developing a common vocabulary of issues.

The district facilitators used TregoED strategies to establish the:

- Methodology for community engagement;
- Criteria for effective decision making; and
- Framework for transparent communication with all stakeholders throughout the process.



The Outcome

TregoED recommended that CMS host a series of public forums before making any recommendations. It was critical to collect community input to establish a “baseline” of community expectations, needs and values very early in the decision-making process.

Based on the documented input from those public forums throughout the district, the Board was able to work with staff and establish a set of guiding principles that framed its decision making and communication with the community.

With the guiding principles in place, the resulting decisions were made and communicated in a far more open and transparent process.



“The TregoED methodology provided structure and stability. As a Board member it gave me tremendous confidence that our decisions were being guided by a consistent framework that the community helped us develop. Even if people disagreed with the end decision, the process we used helped maintain trust, civility, and credibility.”

Eric Davis, the Board of Education Chair



TregoED’s Advanced Strategies Facilitation Delivers Results

TregoED’s Advanced Strategies Facilitation enabled:

- **Better-prepared facilitators;**
- **Constructive engagement of community members;**
- **More accurate information for the Board; and**
- **A solid, strategic, defensible foundation for decisions affecting 60 schools relating to school closures, facility use changes, program consolidations, and attendance rezoning.**

Community members and district leaders noted the benefits of the process. Bolyne McClung, a Charlotte-Mecklenburg community member who was present throughout the meetings, commented, “The meetings were very well-run which led to the sharing of very accurate, thoughtful input from everyone.”

CMS personnel also highlighted the importance of building the facilitation capacities of their teams: “The methodology matched my philosophy,” said Cindee Matson, Director of Telecommunications who was trained as a facilitator. “It took my core beliefs about public involvement and made them much more systematic, which led to a lot of confidence in the process as well as in the information we gathered.”

As with any large-scale initiative, the district is continuing its work to address the impact of its budgeting decisions. With TregoED’s assistance, however, a thoughtful foundation of community engagement has been established that will continue to provide a path for consistent decision making.

