

## Executive Limitation #7: Asset Protection

*The Superintendent shall not fail to ensure all Division assets are adequately protected, properly maintained, appropriately used, and not placed at undue risk.*



### The Superintendent shall not fail to:

1. *Ensure Division assets are protected, maintained, and properly disposed of or recycled when no longer in use.*
2. *Maintain appropriate insurance, to include but not limited to, Errors and Omissions and Comprehensive General Liability insurance coverage, to protect Board members, staff, and the Division itself in an amount that is reasonable for school divisions of comparable size and character.*
3. *Ensure all personnel who have access to material amounts of Division and school funds are bonded.*
4. *Protect all Division assets, including but not limited to the Division's public image and credibility, intellectual property, information, files, equipment, real property, and fixed assets from loss or significant damage.*
5. *Implement a comprehensive risk management approach that minimizes and mitigates risks, including internal controls for capital inventory, and protects assets from misuse, theft, inappropriate destruction, or unauthorized sale or distribution.*
6. *Take responsible steps to protect the Division, its Board, and staff from legal liability.*
7. *Adhere to federal and state laws and FCPS policies regarding the retention and disposal of all records related to the business of the Division.*
8. *Utilize knowledge management to ensure assets are known, maintained, and transferred.*
9. *Annually review existing leasing agreements, contracts, MOUs, and other agreements to ensure assets are being used in accordance with the Division's Strategic Plan goals.*

### Superintendent's Interpretation:

This Executive Limitation calls on the Superintendent to ensure all division assets are adequately protected, properly maintained, appropriately used, and not placed at undue risk.

I interpret this to mean that the Superintendent shall work across the Division to ensure that all assets are appropriately used, managed, and maintained. The Superintendent must also ensure that no assets are placed at risk.

Further, I also interpret this Executive Limitation to mean that it is the responsibility of the Superintendent to direct the work of the Division so that organizational structures are in place to implement and monitor our progress in these areas and to share updates related to this progress with the Board on a regular basis.

### Evidence of Compliance:

#### Certification:

I hereby present my monitoring report on Executive Limitation #7: Asset Protection (EL-7) in accordance with the reporting schedule set forth in the Board calendar. I certify that the information contained in the report is true as of April 10, 2025 to the best of my knowledge, information, and belief.

## Evidence of Compliance: April 10, 2025

At the time of this report, to the best of my knowledge, information, and belief, I have gathered information and evidence that supports compliance with the Board's Executive Limitation associated with this topic. In particular, I share with the board the following information and indicators which I believe meets Executive Limitation #7.

Below is evidence of compliance, including steps taken by FCPS as outlined in [Executive Limitation #7 \(Asset Protection\) - Corrective Action Memo](#). Additional details regarding actions the Division has taken regarding MOUs and Knowledge Management are further detailed in [Appendix A](#) and [Appendix B](#).

### Indicators Include, But Are Not Limited To, The Following:

1. Ensure Division assets are protected, maintained, and properly disposed of or recycled when no longer in use.

#### Newly Added or Updated Evidence Indicator 1:

- In November 2024, the warehouse team created a rapid action plan focusing on procurement analysis and vendor engagement. The team successfully mitigated impacts by cross-training multiple staff members in the buying process to maintain continuity, instituted weekly review meetings to prioritize needs, and improved vendor relationships. This also expanded the team's procurement knowledge, creating a stronger, more adaptable workforce.

#### Continuing Evidence for Indicator 1:

- FCPS implements a multi-faceted approach to responsible asset management through a combination of regulations, programs, and procedures.
  - [Regulation 5028](#): Asset Management (last revised August 15, 2023) provides guidelines for ensuring the proper management of assets owned by FCPS and covers various aspects of the lifecycle management of assets, including the maintenance and disposal of FCPS assets, as well as the FCPS offices and personnel responsible for the management of specific assets.
- Ensures Division assets are protected
  - During inclement weather, FCPS actively monitors chances for dangerous conditions and may cancel activities or close schools to help protect its most valuable assets, students and staff. These delays and cancellations also help FCPS protect buildings, equipment, and grounds from damage.
  - FCPS requires proof of liability insurance from community users and vendors that utilize our property to protect FCPS if any damage occurs during use.
  - Facilities Services and Capital Programs oversees Facilities Management, which is responsible for the maintenance and repair of various facilities and equipment.
- Ensures Division assets are maintained
  - [Policy 5029](#): Equipment Ownership and Use (last reviewed April 1, 2019) stipulates that the principal or program manager shall assume responsibility for all public property under his or her jurisdiction and shall ensure that it is properly maintained.
  - FCPS implements an asset management program with multiple departments involved: Department of Information Technology, Transportation Services, Facilities Management, and Department of Special Services. These departments work together with schools and

departments to track technology assets, assistive learning tools, maintenance equipment, fleet vehicles and other capital assets.

- The FCPS Capital Improvement Program (CIP) allocates funds for capital projects, which may include renovations necessitated by aging infrastructure, implying a focus on maintaining assets.
- The Office of Facilities Management implements processes for the routine, emergency, and preventative maintenance and repairs of all FCPS grounds and facilities.
- Ensures Division assets are properly disposed of or recycled
  - Regulation 5030: Redistribution and Disposal of Products (last revised July 9, 2018) establishes guidelines and procedures for the redistribution and disposal of FCPS equipment, furniture, books, and other non-accountable, controlled, and capital assets.
  - Policy 5030: Disposal of Surplus Books, Equipment, Instructional Materials, Furniture, and Supplies (last revised March 26, 2015) provides for disposal of surplus items through the Office of Procurement Services, Department of Financial Services, in accordance with the Fairfax County Purchasing Resolution.
  - Principals and program managers must transfer assets that are no longer wanted or needed using a Warehouse Request form. The warehouse operations section is responsible for:
    - Assisting schools and departments with the removal and disposal of surplus property;
    - Recording surplus equipment to the Joint FCPS–County Surplus Assets Redeployment System;
    - Posting FCPS excess equipment on the external surplus website.
  - Surplus items such as, but not limited to, supplies, books, instructional materials, furniture, and equipment are sent to the Office of Procurement Services where it will be determined if the items meet the definition of surplus.
  - The authority to dispose of surplus items with a per-unit, after-market value of less than \$5,000 resides with the Chief Operating Officer. Disposal of items with a per-unit, after-market value of \$5,000 and above for grants and \$10,000 and above for other items are considered accountable equipment and must be reported to the Comptroller's Office for the accounting and to Warehouse for review and action.
  - FCPS vehicles are properly disposed of through an auction at the end of their asset life-cycles, which is 15 years for buses and 150,000 miles for county vehicles. Fairfax County Department of Vehicle Services (DVS) conducts the auctions on behalf of FCPS and all proceeds from the auctions are allocated back into FCPS operational funds.
  - Regulation 8541: Recycling Requirements for all FCPS Facilities (last revised February 11, 2019) requires all FCPS facilities to recycle to the maximum extent possible and to recognize that FCPS must be a good steward of the environment. FCPS currently has two recycling initiatives:
    - Recycling of paper, cardboard, metal, and plastic;
    - Recycling of fluorescent light tubes and bulbs.
    - This regulation is currently being updated to include the recycling of scrap metal.
  - The Get2Green program is a collaboration between the Instructional Services Department and Facilities Management that supports environmental stewardship in FCPS and offers specific procedures for responsible disposal of various materials. Through Get2Green, school staff and students are engaged in sustainable practices including energy conservation and waste reduction efforts in alignment with division policies.

- 2. Maintain appropriate insurance, to include but not limited to, Errors and Omissions and Comprehensive General Liability insurance coverage, to protect Board members, staff, and the Division itself in an amount that is reasonable for school divisions of comparable size and character.**

**Continuing Evidence for Indicator 2:**

- The Comptroller's Office Risk Management (RM) team is responsible for developing and implementing solutions to mitigate FCPS' risk exposure and the potential for financial losses. RM maintains appropriate insurance and administers general and School Board liability self-insurance plans. RM also negotiates favorable premium rates to control cost escalations. These policies include, but are not limited to those that cover general liability, cyber liability, property, crime, and automobiles.
- FCPS also provides fiduciary liability coverage for individuals who either have a part in the decision making of an employee benefit plan, administer a plan or its assets or whose name or title is included on benefit plan documents.

- 3. Ensure all personnel who have access to material amounts of Division and school funds are bonded.**

**Continuing Evidence for Indicator 3:**

- The Risk Management team, in accordance with [§15.2-2704 of the Code of Virginia](#) all personnel who have access to material amounts of the division and school funds are bonded. This is updated annually to designate the number of employee roles that will be bonded.
  - All FCPS employees under the crime liability coverage are ensured through VAcop with the requisite fidelity coverage in lieu of a surety bond as permitted under [§15.2-2704 of the Code of Virginia](#). Therefore, individuals do not need to specifically and separately be bonded as they are covered under the policy purchased through VAcop.
  - FCPS has also purchased Crime coverage from VAcop.

- 4. Protect all Division assets, including but not limited to the Division's public image and credibility, intellectual property, information, files, equipment, real property, and fixed assets from loss or significant damage.**

**Newly Added or Updated Evidence Indicator 4:**

- The Office of Communications, in partnership with schools, has nearly completed the Top 10 list for each school, giving schools the opportunities to showcase the things that most make their community proud of being a part of their school. These lists are posted to school websites when complete.
- The Office of Communications sends a weekly positive story roundup so that our School Board and Senior Leaders can see and further amplify the work being done to advance the credibility and reputation of the school system.
- FCPS has a vendor adoption team that reviews all vendors to ensure they comply with both Federal laws such as FERPA and the statutes of the State of Virginia to ensure that FCPS student data, student personally identifiable information (PII), and student educational records remain safe and secure with FCPS approved vendors. Instructional applications are also reviewed for instructional appropriateness.
- FCPS has engaged in continued collaboration with VDOE and Virginia School Districts to craft and implement a revised Student Data Privacy Consortium (SDPC) Virginia specific version of the National

Data Privacy Agreement 2.0. This updated agreement addresses FCPS student privacy issues and strengthens Virginia School Districts to further implement guardrails focused on protecting student data.

- The [Comprehensive School Boundary Review](#) website provides transparency through readily accessible information about this significant process. The website outlines the steps involved in the boundary review, including the reasons for the review and the criteria used in the decision-making process.
- A well-managed FCPS logo ensures consistent application across all platforms (websites, documents, signage, etc.). This consistency builds brand recognition and reinforces a professional, trustworthy image. The Office of Communications works with departments and schools to ensure staff are aware of the appropriate use of the FCPS logo and branded materials to ensure FCPS developed materials are consistent.
- In March of 2025, FCPS, together with Fairfax County Government, launched the [School Bus Arm Camera program](#) to boost safety. The program is designed to reduce the number of violations and injuries caused by people who disregard the school bus stop-arm; protecting our students as they board and leave the school bus.
- In March 2025, FCPS officially began the solicitation process to procure a vendor for a Facilities Condition Assessment (FCA). The purpose is to produce a FCA and to establish a prioritized Renovation Queue for FCPS. The FCA will produce a comprehensive evaluation of a building's physical condition, identifying existing or potential problems that could affect its performance or integrity, and informing long-term planning and budgeting
- The Office of Facilities Management (OFM), with support from the Office of Activities & Athletics, completed in-person inspections and surveys for the outdoor athletic facilities' assets for each high school (began in June 2024 and finished in November 2024). The offices are using the collected inspection data to develop improvement queues for each outdoor athletic asset type and for the overall conditions of the facilities of each high school.

#### **Continuing Evidence for Indicator 4:**

- FCPS provides clear guidelines for record retention and destruction in alignment with state, local and federal requirements.
  - FCPS Records Management Manual, available via the FCPS internal Hub site, includes retention schedules identifying which office is responsible for keeping a record, how long it is kept, and any special requirements about the record, regardless of the format of the record.
  - RM-3 Certificate of Destruction is required when official public records become eligible for destruction, as defined in the Records Management Manual. FCPS is responsible for submitting the online RM-3 Certificate to the Library of Virginia, in accordance with the Code of Virginia [§ 42.1-86.1. Disposition of Public Records](#).
  - The Document Management Office works with departments and offices to identify records created by those offices, then establishes and maintains disposition instructions to align with state and federal laws. This information is recorded in the FCPS Records Management Manual.
  - Inactive student records are transferred annually to the Document Management Office where they are securely stored for long term retention.
- Management of Staff and Student Information is addressed in several ways including:
  - [Regulation 2701: Student Personal Data](#) (last reviewed September 9, 2019) provides directions for the management and handling of student scholastic records and [Policy 2730: Confidentiality of Student Information](#) (last revised November 22, 2021) ensures that information about individual students is maintained appropriately in a confidential manner in order to protect student privacy.



- Student information is housed securely in district managed systems such as our Student Information System (SIS) and in the Special Education Administrative System for Targeting And Reporting Success (SEA-STARS). Access to these systems is either determined by role and location or with appropriate approvals for individual requests. Staff are provided training on concepts such as cybersecurity and FERPA to ensure the privacy of data is understood. Additionally, annual audits are conducted to ensure account access is aligned with any shifts in staff roles.
- Regulation 4220: Maintenance and Disclosure of Personnel Information and Files (last revised April 15, 2019) establishes procedures governing the content of employee files located in the Department of Human Resources (HR) and at local work sites, for responding to requests for disclosure of personnel information, and/or removal of information from the files.
- Accessing systems containing staff information is restricted to authorized FCPS personnel. These staff members must be connected to the Division's secure network, have valid account permissions, and have the appropriate level of access granted through a role-based permission system. This ensures only those who require staff information for their job duties can view it.
- The management of intellectual property is outlined in FCPS Regulations and Policies, including, but not limited to:
  - Regulation 6410: Appropriate Use of Fairfax County Public Schools' Network and Internet Resources (last revised July 7, 2022) states that any work prepared on or with the assistance of FCPS information systems or technology resources is the property of FCPS and cannot be licensed or sold for the benefit of any individual employee or user.
  - Regulation 5980: Sale of Fairfax County Schools' Intellectual Property (last revised October 8, 2020) prescribes procedures for the sale of FCPS intellectual property to external entities.
  - Regulation 1425 Reproduction and Use of Copyrighted Materials (last revised August 28, 2023) describes the acceptable use of copyrighted materials for educational purposes. This includes, but is not limited to, the reproduction and use of copyrighted materials such as: print, printed music, sound recordings, video recordings, video programs, and all forms of digital media.
- To increase the protection of student records, several changes were implemented during the 2023-24 school year including:
  - Changes to FERPA response including direct oversight, review, indexing, and labeling of all files made available prior to inspection.
  - Additional FERPA and Incident Response training for school-based administrators, Special Education staff, Department of Special Services staff, and Leadership.
  - A reorganization to place the Public Records (FOIA/FERPA) team under the Office of Division Counsel, along with oversight of the Department of Special Services VDOE complaint process.
- The Office of Cybersecurity (OCS) was established in 2021. The OCS is instrumental in maintaining a safe and secure computing environment for students and staff. FCPS is focused on managing cyber risks in an ever evolving global threat landscape.
  - Cybersecurity teams actively monitor and manage digital incursions, working to reduce threats to FCPS digital assets. Its responsibilities include implementing proactive security measures, conducting risk assessments, responding to incidents, and providing ongoing training to ensure staff and students are equipped to navigate the digital landscape safely and responsibly.
  - The OCS Governance, Risk, and Compliance (GRC) team established a robust risk management program aligned with the National Institute of Standards and Technology (NIST) Risk Management Framework (RMF). This initiative will enhance the organization's cybersecurity posture by proactively identifying, assessing, and mitigating cyber risks and assets.

- A key cybersecurity initiative involves risk-based authorization and monitoring for third party vendors and in-house applications, including the establishment of a Cybersecurity checklist for vendors.
- Starting SY 2023-24, every employee must take mandatory Cybersecurity awareness training, to equip them with the knowledge and skills to recognize and mitigate cyber threats.
- FCPS promotes Digital Citizenship education through interactive workshops, curriculum integration, and awareness campaigns, emphasizing the importance of responsible online behavior, privacy protection, and cybersecurity awareness for all employees and students. Required student lessons focus on topics such as understanding digital citizenship, digital footprints, proper use of AI, and time management strategies with digital resources.
- Regulation 7004: Management of Fairfax County Public Schools External Communications (last revised January 12, 2024) and Social Media Guidance for Staff provide guidance on employees' use of social media. This helps foster a more positive public image for FCPS and prevents situations that could damage the organization's reputation.
- An earned media report is shared with the School Board once a month highlighting positive news items that have been generated by the work of the Office of Communications. This is in addition to being responsive to media inquiries both positive and negative and ensuring that FCPS' reputation is protected in the response.
- Brand guidelines are created to manage how FCPS is represented visually (such as in photos and using logos).
- The Office of Communications regularly reviews logos, images and other content across the system to ensure that our Brand Guidelines are maintained - which in turn supports the advancement of the brand and reputation of the organization.
- Risk Management oversees in-house claims management to effectively handle liability claims against FCPS and recover funds from those that have done damage to FCPS with a consistent focus on maintaining the reputation and public image of FCPS.

**5. Implement a comprehensive risk management approach that minimizes and mitigates risks, including internal controls for capital inventory, and protects assets from misuse, theft, inappropriate destruction, or unauthorized sale or distribution.**

**Continuing Evidence for Indicator 5:**

- Procedures have been established for Auction and Surplus of excess materials and equipment by the Forte Warehouse.
- Reporting and reconciliation procedures have been documented and are followed to ensure surplus inventory is validated and accounted for.
- The Office of Cybersecurity (OCS)'s Governance, Risk, and Compliance (GRC) established a robust risk management program aligned with the National Institute of Standards and Technology (NIST) Risk Management Framework (RMF). The NIST RMF program is closely aligned with NIST CSF (Cybersecurity Framework) and CIS (Center for Internet Security) Top 18 Controls. NIST CSF, NIST RMF, and CIS Top 18 are integrated programs that form the bedrock of data security programs at FCPS.
- FCPS follows Generally Accepted Accounting Principles for the financial accounting of assets.
- Internal controls are used to protect inventory and assets. This includes physical controls and preventative controls over assets. Controls include, but are not limited to:
  - Asset Policies;
  - Restricting assets (locks, safes);

- Performing periodic physical inventories and reconciling asset records;
- Proper disposal of retired assets;
- Segregation of duties of asset acquisition, recordkeeping and disposal;
- Controls over approval of asset purchases and disposals;
- Controls over access of accounting system and records/role based access, approvals;
- System Controls in managing assets to include acquisition, maintenance, and disposal.
- The Office of the Comptroller is responsible for the oversight, recording, and accounting of accountable equipment. The specific tasks include:
  - Distributing and tracking accountable equipment property identification (PID) tags to ensure the accuracy of the location information in FOCUS. Tags include a barcode label in different colors for different assets/funding sources;
  - Scheduling and monitoring inventories;
  - Coordinating the property transfer and disposal of surplus property, including the preparation of the required Inventory Management Report (IMR-01) which is used for the disposal or transfer of all accountable equipment;
  - Reviewing financial data for the following aspects of accountable equipment prior to updating in FOCUS: procurement, disposals, donations, transfers, and reconciling accountable equipment transactions for preparation of financial reports and year-end schedules for internal and external auditors.

## **6. Take responsible steps to protect the Division, its Board, and staff from legal liability.**

### **Continuing Evidence for Indicator 6:**

- The Office of Division Counsel (ODC) serves as the in-house legal resource for the school division, consulting with Board members and staff on a variety of matters to mitigate potential legal risks. Attorneys in ODC also review documents and provide training to ensure legal compliance in a number of areas, while keeping abreast of changes in laws and regulations.
- This item will be subject to further privileged and confidential discussion with legal counsel in closed session.

## **7. Adhere to federal and state laws and FCPS policies regarding the retention and disposal of all records related to the business of the Division.**

### **Continuing Evidence for Indicator 7:**

- FCPS follows federal, state, and Division regulations and policies regarding the retention and disposal of records, including, but not limited to:
  - Code of Virginia [§ 42.1-86.1](#): Disposition of public records
  - FCPS [Regulation 6701](#): Records Management Program and [Policy 6470](#): Records Retention and Disposition Outline procedures regarding records retention requirements and maintenance and disposition procedures for all records connected with Fairfax County Public Schools.
  - The procedural guidelines outlined in the [Records Management Manual](#) provide staff with guidance to ensure that all claims records are maintained and destroyed in alignment with the Virginia Public Records Act.



## 8. Utilize knowledge management to ensure assets are known, maintained, and transferred.

### Newly Added or Updated Evidence Indicator 8:

- The Office of Facilities Management has developed and implemented over 35 new Standard Operating Procedures (SOPs) since the last EL-7 report. A working group/task force was developed and continues to document and add new SOPs on a regular ongoing basis.
- The Office of Assessment and Reporting maintains the FCPS Guide for the Virginia Assessment Program as knowledge management of federal and state required assessment and accountability procedures and expectations.
- Beginning in October 2024, employee exit surveys are now administered digitally during the offboarding process through StaffConnect. Prior to October 2024, the HR-2 Resignation Form was handled through a paper-copy submission, and therefore, it was challenging to obtain exit survey responses. It is anticipated that with the new electronic survey option, FCPS will receive more actionable exit survey data in the coming year.

The Office of the Chief of Staff has initiated the following actions to address the Corrective Action Plan which can be found in [Appendix B](#). Highlights include:

- Led a review of FCPS operations using the Baldrige Framework to identify areas for improvement in knowledge management practices.
  - To prepare FCPS' application, cross functional teams of principals and operational leaders have been documenting strategies and processes in each category.
  - FCPS will submit its initial 25-page application to The Partnership for Excellence in late April 2025.
  - Recommendations for streamlining processes will be given to the Superintendent for consideration during quarterly budget reviews in FY26 and to inform the FY27 budget.
- Worked with departments and regions to ensure major activities for each were documented.
  - FCPS has collected documentation for the major activities of departments and regions. These artifacts include, but are not limited to: handbooks, links to information on the FCPS Employee Hub, links for information on FCPS public website, internal Standard Operating Procedures (SOP), and Project management templates.
- Led the development and deployment of standard division-wide onboarding and offboarding procedures, resources, and supports, including the use of entry plans for leadership roles.
  - Onboarding: FCPS has standard division-wide compliance onboarding procedures, based on employee type. Separate workflows are tailored to include only the elements that are required.
  - Entry Plans: Entry plans have been developed for principals through a standard template which may be modified for specific uses. Elements of the entry plans may include, but are not limited to: mission and vision statements, pre-entry plan, 90-day action plan, priorities, and goals. FCPS will begin to develop entry plans for chiefs, assistant superintendents, and directors.
  - Continuity of Operations: FCPS has created a comprehensive Continuity of Operations (COOP) program which aims to ensure the continuation of essential functions during disruptions by using Business Continuity Plans (BCP).
  - Offboarding: Current offboarding procedures are aligned to compliance and security.
  - Exit Plans: To formalize this work and increase the Division's effectiveness, a cross functional FCPS team will create a standardized exit plan template for senior leaders to document their key responsibilities and task owners.

- FCPS will assemble a working group to create standard templates for SOPs, project management plans, and new hire handbooks. In addition, this working group will ensure that there is a central repository for these documents on the FCPS intranet.
- FCPS has explored opportunities to further embed knowledge management strategies in FCPS, which include current knowledge management strategies utilized across all FCPS departments, future implementation of new knowledge management software (Atlas), and the creation of a data governance team.

#### **Continuing Evidence for Indicator 8:**

- Information dissemination provides the foundation for knowledge management in FCPS. Utilizing online platforms including internal forums, FCPS establishes knowledge-sharing communities and collaboration tools to facilitate knowledge exchange and accessibility.
  - The FCPS curriculum repository provides management tools for curriculum, assessments, and resources provisioned for schools. It supports the delivery of vetted, accessible, and up-to-date content through Schoology (our learning management system), Performance Matters (our assessment system), websites, and printed materials. FCPS staff access division resources through Schoology such as planning and pacing guides, and other curricular resources.
  - The [Budget Documents page](#) houses specific program budget details including budget narratives and detailed funding breakdowns for the past 5 fiscal years. These serve as a record of how schools and departments have been funded, including changes to programs and positions.
  - FOCUS, the enterprise resource planning (ERP) financial management system, serves as a record of financial transactions (budgeted and spent) for schools and offices throughout FCPS. Data in FOCUS is available from 2012-present.
  - The Information Technology Operations team uses an online system for knowledge management. ITO maintains a backlog of needed Standard Operating Procedures (SOPs), which is a continuous process. The audience for these SOP artifacts are primarily internal to DIT.
  - FCPS uses collaboration platforms such as Google Workspace and Zoom to facilitate communication, collaboration, and knowledge sharing among all employees. Some departments employ additional platforms such as ClickUp, JIRA, and FreshService to communicate and manage workflows for departmental and Division projects.
  - FCPS utilizes a system of platforms to provide ongoing training programs including internal workshops and employee access to online learning platforms like FCPS MyPDE and Coursera Upskilling Academy.
  - [BoardDocs](#) serves as a record of all School Board meetings and public worksessions, related documents, decisions, and motions from 2004-present. Also housed in BoardDocs is a library of related documents including but not limited to budget questions, governance manuals, and reports. Finally, all policies, regulations, and notices can be found in BoardDocs.
- Standard Operating Procedures (SOPs) act as a cornerstone for effective knowledge management by providing consistency of practices and knowledge sharing as well as processes for capturing and documenting organizational knowledge. Examples of SOPs in FCPS include, but are not limited to:
  - The FCPS Crisis Management Manual was developed to assist school administrators, crisis management team members, faculty, staff, students and local first responders in the planning, development, exercising, and the execution of crisis, emergency management and medical emergency response plans by providing clear policies, guidelines, definitions, procedures, and operational concepts.

- To comply with [VA Code §22.1-279.8](#), which mandates a written crisis, emergency management, and medical emergency response plan for every school, all FCPS schools develop and update their emergency plans annually. The Office of Safety and Security (OSS) reviews, approves and certifies that these plans consider the accessibility needs of staff and students and meet state and Division standards. Once the crisis plans are approved, OSS inputs all members of the crisis team into an application that allows for immediate communication during a crisis.
- OSS has a working, living document entitled, *System-Wide Emergency Operations Plan*, which is executed in concert with Fairfax County. This plan is to be used in extreme emergency conditions to support schools and the citizens of Fairfax County. During these emergency conditions, the plan operationalizes supports that include but are not limited to; police, fire, and emergency management assets, citizen and pet/animal housing, distribution of medicine and medical supplies, and the distribution of food, water, and other critical needs. This plan only becomes operational when declared by designated FCPS or County officials.
- Continuity of Operations Plans (COOPs) are in place for OSS, DIT, and FIN. These plans provide direction to staff during a significant interruption in normal operations to continue in their support missions at alternative locations and/or by alternative means.
- In accordance with [Regulation 6250: RequestIT Asset Inventory System](#) (last revised June 8, 2023), DIT utilizes SOPs to document procedures to create consistent asset management practices.
- The Office of Transportation maintains a Pupil Transportation Manual that is updated biannually which includes all rules, policies, and procedures for bus drivers and attendants.
- Risk Management maintains a physical and electronic procedural manual that outlines information such as directives, responsibilities, fact sheets, insurance policies, claims handling procedures, field trip review processes, and financial fund information.
- There are a variety of sources published on the employee Hub to increase awareness and facilitate access to financial resources such as the School Finance Handbook, Financial Best Practices, Grants Manual, and Travel Resources.
- Several other SOPs are under development across the organization.
- Newsletters distribute important information and updates to staff, facilitating a flow of information.
  - FCPS publishes weekly Employee News emails, Infograms, and Actiongrams to communicate with FCPS employees and share relevant updates.
  - Many departments also offer targeted publications and hold office hours to keep staff informed, which include but are not limited to:
    - The Department of Special Services and the Office of Communications host virtual Office Hours for principals. This is an opportunity for employees to connect directly with team members and get personalized help with questions or concerns.
    - The Office of Auditor General's (office) periodical, [Audit Buzz](#), provides an update into the office's work by summarizing the results of completed audit projects, describing upcoming audits, and providing insight into other audit-related tasks. The contents are prepared solely by the office which reports directly to the School Board.
    - The Financial Support team provides a weekly newsletter to school financial staff providing financial directives and procedural updates.
    - The Comptroller's office publishes monthly newsletters, Comptroller Connections, to share best practices and guidance on a variety of financial topics.
    - Food and Nutrition Services (FNS) provides weekly information communication to all FNS staff.

- The Office of Transportation Services has a bi-monthly newsletter for bus drivers and attendants to communicate any information and policy changes.
  - The Department of Information Technology (DIT) shares critical monthly technology updates via staff newsletter.
  - The Office of Facilities Management has a monthly newsletter called "Trades Your Way".
- Providing training and mentorship programs on specific processes, skills, or new knowledge ensures dissemination of up-to-date information and supports employees with role specific practices, a readiness for future opportunities, and an understanding of Division operations as a whole. These include, but are not limited to:
  - MyPDE is a central repository for all FCPS professional development and training and includes a library of online courses and resources. Required trainings are assigned to employees through MyPDE and a record of completion is maintained through this online platform.
  - The School-Based Administrator Induction Program (SBAIP) is designed to support new school administrators in their first year of service in the position. Essential information about school leadership is presented to support the learning of new assistant principals, directors of student services, and directors of student activities.
  - The Principal Induction Program (PIP) is designed to meet the immediate informational and leadership needs of new principals as well as experienced principals who are new to their schools. PIP II is designed for second year principals to continue to build their leadership skills and knowledge.
  - Leading the Mission (LTM) is a leadership cohort designed for experienced principals. Leading the Mission will broaden principals' horizons by preparing them to be systems leaders beyond their current school focus (mentors to other leaders, central office roles, region leadership roles, etc.).
  - Seven Competencies Strong (formerly called Supporting Success) is a cohort program for Schedule A operational employees that supports budding leadership skills with participants' strengths in mind.
  - The purpose of Operational FLEx (Foundational Leadership Expectations) is to support the growth and development of operational leaders' adaptive leadership skills to increase their confidence in managing teams and leading change, which is inherent in their work. FLEx is also intended to increase employee engagement and retention among operational staff by supporting the growth of adaptive leadership skills among Schedule B & C leaders with direct reports.
  - The Collaborative Middle Managers' Roundtable (MMRT) is a program for middle managers sponsored by FCPS and the Fairfax County Government. This nine-month program provides skill development in critical thinking, management, and leadership.
  - Supporting the Mission is a year-long cohort designed to familiarize participants with the mission and goals of each department within FCPS and includes the opportunity for participants to work collaboratively in developing a proposed solution to a real inequity problem of practice. This program is open to central office and school-based teacher leaders and administrators as well as Schedule B and C operational employees.
- FCPS supports the onboarding and learning for new employees, including, but not limited to:
  - Great Beginnings is a comprehensive new teacher induction program. Its mission is to support and retain new FCPS teachers. The program includes county- and school-level supports for new teachers, their mentors, and their administrators. Program supports are differentiated for Special Education teachers, brand new teachers, and teachers new to FCPS to ensure they have a deeper understanding of what they need to support their students.

- The Office of Transportation Services offers employee training programs including, but not limited to, a mentor program to ensure every new driver and driver attendant is assigned an experienced mentor, new employee connection meetings, yearly Ride-A-Longs conducted for each driver, and a Transportation Academy program for newly hired supervisors.
- The Administrative Services team has a dynamic onboarding process for new employees, providing customer training in group and 1:1 settings for the software application used to facilitate day to day operations and holds regular training sessions on the process and the application used for staff and customers.
- By acting as sounding boards and advocates for knowledge exchange, advisory groups can help bridge information silos and ensure best practices are disseminated effectively throughout FCPS. FCPS has established several advisory committees amongst a diverse group of stakeholders, which include, but are not limited to, Superintendent's Advisory Council (SAC), Superintendent's Teacher Advisory Council (STAC), Superintendent's Strategic Plan Advisory Group, and the Superintendent's Family Vision Group.
- FCPS has practices in place that demonstrate a commitment to knowledge management processes:
  - Inventory Systems: FCPS utilizes inventory management systems to track assets across various categories (e.g. facilities, equipment, vehicles, technology). These systems help maintain an awareness of what assets the Division owns;
  - Maintenance Procedures: As identified earlier, the FCPS Capital Improvement Program (CIP) and Budget reflect the planning and allocation of resources for asset maintenance;
  - Transfer Processes: FCPS has established procedures for transferring assets between departments or locations (e.g. built-in cost/fund codes for assets and budget request procedures).
- Comprehensive inventory management practices in FCPS include, but not limited to:
  - Policy 5028: System of Inventory Management (last reviewed April 1, 2019) establishes procedures and responsibility for a system of inventory management;
  - Notice 6250: Request IT Asset Management System Certification Schedule for 2023-2024 specifies the annual schedule for certification of computer and peripheral inventory data. Principals and/or program managers must provide certification by reviewing and ensuring the accuracy of their data once per year;
  - FCPS exercises physical controls over inventory to include restricting of assets through proper storage, and conducting periodic physical inventory counts and reconciling asset records.
  - Accountable equipment, defined as capital assets \$10,000 and over to include grants, (such as vehicles, office-related property including copiers, machinery or computer file servers); assets are “asset-tagged”, tracked, and physically inventoried every two years through the Accountable Equipment Audit.
    - All fixed assets purchased or acquired through a grant must be tracked separately, even if the value of the asset is less than \$10,000, and must follow FCPS inventory management practices as well as any inventory procedures set forth by the granting agency.
  - The Office of the Comptroller, Department of Financial Services (DFS), is responsible for the reporting of capital assets and ensuring that proper inventory records are maintained in FOCUS, the online financial system and chart of accounts used by Fairfax County government.



**9. Annually review existing leasing agreements, contracts, MOUs, and other agreements to ensure assets are being used in accordance with the Division's Strategic Plan goals.**

**Newly Added or Updated Evidence Indicator 9:**

- As directed by the Board, the Office of Facilities Planning Services prepared a lease consolidation plan, which was sent to the Board in January 2025, in advance of the Executive Limitation 11 report. The plan provided background information and options to support any future reviews of leases to determine necessity, cost analysis, and alignment to the Division's Strategic plan.

The Office Division Counsel (ODC) has implemented the following actions to address the Corrective Action Plan which can be found in [Appendix A](#). Highlights include:

- FCPS will adopt best practices in the creation and implementation of MOU's to include:
  - Standardized Templates and Clear Guidelines for MOUs
  - Streamlined and Efficient Routing
  - Comprehensive Review and Due Diligence
  - Effective Record-Keeping and Monitoring
- A drafted division-wide MOU process will include:
  - Clear delineation of roles and responsibilities
  - Initiation and drafting of the MOU with review and feedback provided by the Office of Division Counsel and approval by Assistant Superintendent and/or Chief, Legal and/or Risk Management, and Superintendent final approval and authorization for execution.
  - Execution and distribution whereby the originating Department circulates the signed MOU for signature by authorized representatives of all parties and ensures that all are provided a final, counter-signed version of the MOU. ODC will retain a copy and maintain a division-wide inventory of MOUs.
  - Monitoring with regular reviews to be conducted where needed to ensure compliance and identify areas for improvement.
  - Documentation and record keeping

**Continuing Evidence for Indicator 9:**

- The Office of Division Counsel reviews agreements, contracts, MOUs and other agreements to ensure compliance with the School Board Purchasing Resolution, the Virginia Public Procurement Act, and other state and federal laws.
- The Comptroller's Office - Risk Management team, reviews MOUs, contracts and lease agreements from an insurance and risk management perspective as needed. A review of the language that potentially implicates FCPS financially or legally is performed and FCPS eliminates the language or offers alternative wording before moving forward with the agreement.

**Leasing Agreements**

- The Office of Facilities Planning Services within the Office of the Chief of Facilities Services and Capital Programs is responsible for all aspects of a lease including but not limited to:
  - Reviewing and maintaining the lease terms.
  - Ensuring the landlord abides by the lease agreement.
  - Site visits to check conditions.
  - Maintaining contact with on-site supervisors.
  - Allocating funds for subsequent years increases rent, maintenance, and operation costs.



- Accuracy of invoices submitted by the landlord.
  - Ensuring rent and other costs are paid in a timely fashion.
  - Managing repairs or requests for modifications.
- Leasing terms are reviewed quarterly by the Property Management team within the Office of Facilities Planning Services. For new leases and lease renewals, the Office of the Chief of Facilities Services and Capital Programs, site supervisors, Division Counsel, and real estate brokers (when applicable) collaborate to ensure the terms are favorable for FCPS.
- Prior to pursuing any lease, the Property Management team evaluates space requests, identifies essential needs, and explores space options, including space in FCPS school buildings, non-school buildings, and leased property.
  - School and non-school building options are researched. If one of these options are available, the Property Management team submits a capital improvement estimate request to the Office of Facilities Management (OFM) to estimate any necessary capital improvement costs.
  - When an internal option is not available, a real estate broker from the approved contractor's list is contacted and provided with the essential property needs. The broker does research and provides options that meet the program's needs.
- The Property Management team estimates costs for the lease.
  - The Property Management team estimates all costs related to leasing property, including rent, rent escalations, maintenance and operations, insurance, taxes, improvements such as renovations and furnishings, security/building access, etc. and these are included in the Fiscal Forecast Request. If the request is recommended, it is included in the Superintendent's Proposed Budget and approved by the Board in May.

## Contracts

- The Office of Procurement Services is responsible for ensuring compliance of procurements, including contracts for single or recurring purchases.
  - Regulation 5012 Purchasing Goods and Nonprofessional Services (last revised July 12, 2021) provides guidance for the acquisition of goods and nonprofessional services (excluding construction) using appropriated and non-appropriated funds.
  - Policy 5011- Authority to Contract (last revised March 9, 2023) outlines who has the authority to enter into contracts, the Division Superintendent or designee, or the Purchasing Agent or designee.
  - Schools and departments are required to submit quotes and contractual agreements to Procurement for review. Requests for contract review are submitted via the Contract Request and Management System (CRAMS). Submission of a CRAMS request requires the selection of a Strategic Plan Goal to ensure alignment of Division priorities.
  - Where review of a procurement includes use of a vendor's agreement, the Addendum to Contractor's form (drafted by Office of Division Counsel with mandatory terms and conditions to protect FCPS interests) is included as an attachment. This ensures compliance with including mandatory terms and removal of prohibited terms.
- The Office of Division Counsel (ODC) provides internal guidance documents for Procurement to conduct contract reviews. ODC conducts reviews of contracts when additional legal advice is required.
- Office of Procurement Services conducts continuous review of Contract Terms in several ways:
  - At the time a purchase order is issued, Procurement reviews compliance with contract terms including scope, pricing, quantity, and delivery.

- Vendor performance is reviewed for all centrally managed contracts as described in the Contract Administration Best Practice which includes post-award orientation, contractor compliance, performance monitoring, contract modification, and contract closeout/completion.
  - Contract expiration reports are reviewed monthly by Procurement to ensure compliance with the initial contract term and the option to exercise a renewal term as well as ensuring timely renewal and replacement of contracts.
- At the time of purchase, the approval workflow in FOCUS requires multiple levels of approval by Procurement to ensure compliance with contract terms, including scope, quantity, pricing, delivery, etc. In addition, approval review ensures fund and commodity codes are used appropriately.
- The FOCUS procurement workflow utilizes approval thresholds to ensure a multi-level approval process with a clear separation of duties. Purchase orders draw from the total contract value and require approval based on the following thresholds:
  - \$10,000 or less: No approval needed.
  - \$10,000-\$50,000: Buyer approval.
  - \$50,000-\$100,000: Buyer and Buyer Supervisor approval.
  - \$100,000 +: Buyer, Buyer Supervisor, and Director or designee approval.

## EL-7 Corrective Memo - Appendix A

Division Counsel will:

- Create a shared process for creating, maintaining, and reviewing MOUs in FCPS. Key areas of practice should include:
  - Define MOU needs and alignment with the Strategic Plan.
  - Establish approval levels.
  - Develop a plan to implement existing MOU template, division wide.
  - Develop an internal review process as well as future workflows to continue to review MOUs for effectiveness and organizational needs.
  - Create a central repository and designate an office responsible for MOU oversight.
- Review and refine MOU plans and processes with Leadership Team and Departments.
- Develop FCPS process to reflect MOU practices.
- Share updated process with the Board no later than April 10, 2025.
- Implement a communication plan and staff training on new MOU process.

### Overall Summary: Best Practices

*Best practices below are based on an analysis of Office of Division Counsel (ODC) surveys and consultation with both internal and external partners.*

- Standardized Templates and Clear Guidelines
  - Develop Standardized MOU Templates to ensure consistency in format, language, and required clauses.
  - Create a Comprehensive MOU Procedure: Clearly define roles, responsibilities, approval processes, and legal requirements.
  - Provide Clear Guidelines and Training: Ensure staff understand the MOU process, including drafting, routing, and record-keeping.
- Streamlined and Efficient Routing
  - Establish a Defined Approval Routing Process: Outline the specific steps and individuals/departments involved in the approval process.
  - Utilize Electronic Workflow Systems: Implement electronic routing and approval systems to track progress, reduce delays, and improve transparency.
  - Designate a Central Point of Contact: Assign a specific individual or department to manage the MOU process and answer questions.
  - Set Realistic Timelines: Build clear timelines into each stage of the approval process and communicate them to all parties.
- Comprehensive Review and Due Diligence
  - Ensure Alignment with Strategic Goals: Verify that the MOU supports the division's mission, goals, and strategic plan.
  - Due Diligence on Partner Organizations: Verify the legitimacy and reputation of partner organizations.
- Effective Record-Keeping and Monitoring
  - Establish a Centralized Repository: Store all executed MOUs in a secure, centralized location, either electronic or physical.
  - Implement a Tracking System: Track the status of all MOUs, including initiation, review, approval, and expiration dates.

- Assign Responsibility for Monitoring Implementation: Designate individuals or departments to monitor the implementation and effectiveness of MOUs.
- Conduct Regular Reviews and Evaluations: Periodically review MOUs to ensure they are still relevant and effective.
- Establish a Process for Renewal and Termination: Define clear procedures for renewing or terminating MOUs.
- Maintain an accessible archive: Ensure MOUs are maintained in alignment with Library of Virginia document retention guidelines.

## **Draft MOU Process**

*Best practices have informed the following process to be implemented in FCPS.*

- Roles and Responsibilities
  - Originating Department/Office: Responsible for initiating the MOU, developing the draft, and ensuring alignment with their goals and needs.
  - Department Head: Reviews and approves the MOU at the local level.
  - Relevant Division-Level Department (e.g., Legal, Finance, Curriculum, Human Resources): Reviews the MOU for compliance with their respective areas of expertise.
  - Superintendent: Provides final approval and authorization for execution.
  - Legal Counsel: Reviews the MOU for legal compliance and risk assessment.
- Initiation and Drafting
  - The originating department/office identifies the need for an MOU and drafts the document, clearly outlining the purpose, scope, responsibilities, and terms of the agreement.
  - ODC will review and provide feedback on any changes submitted by the outside entity and will participate in any negotiations as necessary.
- Review and Approval
  - Assistant Superintendent and/or Chief
    - The administrative reviewer ensures all necessary reviews have been completed and that the MOU aligns with the Strategic Plan.
  - Legal/Risk Management Review
  - Risk Management, as needed
  - Superintendent Approval
    - Final approval and authorization for execution.
  - The signed MOU is returned to the initiating Department.
- Execution and Distribution
  - The Originating Department circulates the signed MOU for signature by authorized representatives of all parties and ensures that all are provided a final, countersigned version of the MOU.
  - Copies of the executed MOU are distributed to all relevant parties, with a copy sent to the Office of Division Counsel.
  - ODC will retain a copy and maintain a division-wide inventory of MOUs.
- Monitoring and Evaluation
  - Each originating office/department is responsible for monitoring the implementation of the MOU and evaluating its effectiveness.
  - Regular reviews should be conducted to ensure compliance and identify areas for improvement.
- Documentation and Record Keeping

- Each department will maintain an MOU tracking sheet, which will be maintained in a Google shared drive, with access provided to the following central office stakeholders: Superintendent, Chief of Staff, Chief of Schools, Chief Experience Office.
- Each Department/Office will designate a primary MOU contact who will keep the department tracking sheet up-to-date, monitoring implementation and timelines.
- Guidance Documents and Training
  - Develop ODC Guidance Document/How-to MOU from ODC:
    - Flow Chart with Development process -what requires review/not
    - Include an up-front checklist for MOUs to include identification of why MOU is necessary to meet work towards Strategic Plan goals
    - How to negotiate with another party over terms in MOU
    - Who should be included when developing content

#### **Draft Training and Support Plan**

- Guidance Documents to be developed and published by June 30, 2025
- Develop a communications plan by June 30, 2025
- Training to be completed by August 15, 2025
  - Template MOUs
    - ODC to create a library of current templates, and meet with each department to assess need for any additional templates
    - Generic Model Template with Preferred Terms that are non-negotiable
    - ODC to create an Addendum of non-negotiable terms to be used for any outside entities who require use of their own MOU form

#### **Summary of Deliverables:**

<b>Task</b>	<b>Deadline</b>
ODC develops new MOU Routing Slip	4/30/25
ODC consult with IT to create an electronic routing system	5/31/25
Template Library Established	5/31/25
ODC develops MOU guidance document	6/30/25
ODC develops communication plan	6/30/25
Training and Implementation of new MOU Processes	8/15/25

## **EL-7 Corrective Memo - Appendix B**

The Chief of Staff will:

- Lead a review of FCPS operations using the Baldrige Framework to identify areas for improvement in knowledge management practices.
- Work with departments and Regions to ensure major activities for each are documented.
- Lead the development and deployment of standard division-wide onboarding and offboarding procedures, resources, and supports, including use of entry plans for leadership roles.
- Ensure essential division-wide practices are uniformly documented, communicated, and available to staff to ensure consistent interpretation and application.
- Explore opportunities to further embed knowledge management strategies in FCPS.
- Share the updated plan with the Board no later than April 10, 2025.

### **Lead a review of FCPS operations using the Baldrige Framework to identify areas for improvement in knowledge management practices.**

At the School Board's direction, FCPS is on the cusp of submitting its first application for the [Malcolm Baldrige National Quality Award \("Baldrige Award"\)](#), established by Congress to improve the quality of American products and dedicated to improving the performance, resilience, and long-term success of American businesses by:

- Recognizing role models.
- Fostering the adoption of proven leadership, management, and operational practices (including knowledge management)
- Developed a specific framework for education.

FCPS will submit its initial 25-page application to The Partnership for Excellence in late April 2025. The formal 50-page application will be submitted in December 2025. Feedback from Baldrige examiners will be received in two phases: initial feedback in summer 2025, formal feedback in spring 2026.

To prepare FCPS' application, cross functional teams of principals and operational leaders have been documenting strategies and processes in each category. The Senior Leadership Team began reviewing this documentation in February to analyze duplication, gaps, and inefficiencies in our processes.

Recommendations for streamlining processes will be given to the Superintendent for consideration during quarterly budget reviews in FY26 and to inform the FY27 budget.

### **Work with departments and Regions to ensure major activities for each are documented.**

In addition to FCPS Regulations posted on BoardDocs, FCPS has collected documentation for the major activities of departments and regions. These artifacts include:

- Handbooks
- Links to information on the FCPS Employee Hub
- Links for information on FCPS public website
- Internal Standard Operating Procedures (SOP)
- Project management templates



## **Lead the development and deployment of standard division-wide onboarding and offboarding procedures, resources, and supports, including use of entry plans for leadership roles.**

### **Onboarding**

FCPS has standard division-wide compliance onboarding procedures, based on employee type. There are separate workflows based on employee role (such as contracted school-based and nonschool-based employees, hourly employees, and substitute teachers).

These workflows are tailored to include only the elements that are required for each employee type. The elements that may be included in these workflows are:

- Employment verification
- Policy and regulation reviews
- Fraud and Abuse Hotline overview
- Direct deposit form
- Required employee trainings
- Fingerprint data form
- Negative Tuberculosis (TB) Test
- I-9 required documents
- Employee benefits

While compliance is important, another key component of onboarding new employees is to introduce them to FCPS' mission, vision, and Strategic Plan. In an organization this large, understanding the resources available to employees and where to find them can be challenging. To address these challenges, the Department of Human Resources has begun a review of induction programs within the Division, with a focus on operational employees. Enhancements to employee onboarding are planned in the immediate future. These include:

- **July 2025:** A pilot program for in-person onboarding, with translation support, to allow employees to receive:
  - Hands-on technology training
  - Overview of FCPS structure
  - Introduction to the Strategic Plan
  - A direct line of contact to overcome onboarding hurdles
- **August 2025:** A Manager's Guide to Onboarding will be provided to all operational managers. This guide will provide guidance on introducing new employees to FCPS' mission and vision, along with its culture. Recommendations will be provided for assigning new operational employees a mentor.

### **Entry Plans**

Entry plans have been developed for principals. A standard template was developed by the Chief of Schools office, in collaboration with the Department of Strategy, Planning, and Learning, which may be modified for specific uses. The Office of Professional Learning has introduced the use of entry plans in their principal training modules. Additionally, Region offices use entry plans to help guide new principals and ensure successful onboarding. These action plans are used as supplemental material during principal evaluations.

The Office of Professional Learning will begin to develop standard entry plans for chiefs, assistant superintendents, and directors. These entry plans will be finalized by **September 2025**.

## Offboarding

Employee offboarding is a shared responsibility between the Department of Human Resources, the Department of Financial Services, and all FCPS supervisors. Current offboarding procedures are aligned to compliance and security. Current offboarding practices include:

- Resignation/Termination Process:
  - Employees submit a StaffConnect ticket to submit their HR-2 for resignation or retirement, VDOE-mandated exit survey questions are required responses during this submission process
  - Supervisors are notified once an HR-2 is submitted for one of their employees and they are responsible for communicating their departure as needed – to relevant employees, teams, or the community
- Knowledge Transfer and Handover:
  - Ensuring ongoing projects are reassigned
  - Documenting critical information for successors
- Revoking Access and Security Measures:
  - Disabling email and system logins – Supervisors submit a StaffConnect ticket to revoke security permissions/access to systems
  - Badges – the badge administrator at each worksite is responsible for collecting and deactivating employee badges
  - Collecting company assets such as laptops and other equipment – Supervisors are responsible for collecting these items
- Final Payroll, Benefits and Retirement Plan Processing:
  - Payroll will process the final paycheck
  - If the StaffConnect ticket is for a retirement, the appropriate retirement system will contact the employee regarding their retirement processing
  - The office of Benefits in Financial Services will reach out to employees exiting the system regarding their benefits options (COBRA, etc.)
- Employee Exit Experience:
  - Offering career transition support (if applicable)
  - Gathering feedback for improving workplace policies

## Exit Plans

FCPS has researched best practices in exit plans as part of its research of knowledge management as a whole. Some aspects of exit plans are detailed below:

- Document and Capture Knowledge: Before an employee leaves, identify the specific knowledge and expertise they possess that are vital for the company's operations.
- Capture Tacit Knowledge: Encourage employees to share their tacit knowledge (knowledge that is difficult to articulate) through interviews, presentations, or workshops.
- Plan for Succession: Identify a support plan for the successful transition of the future employee.
- Assign Responsibilities: Clearly define who will take over the departing employee's responsibilities and ensure a smooth handover of tasks and projects.
- Review and Update Knowledge: After the employee leaves, review and update the documented knowledge to ensure it remains accurate and relevant.

Currently, the responsibilities of creating exit plans for leaders are handled by individual departments informally. To formalize this work and increase the division's effectiveness, a cross functional FCPS team (Chiefs) will create a standardized exit plan template for senior leaders to document their key responsibilities and task owners. Exit plans for senior leaders will be completed by **September 2026**.

## **Continuity of Operations**

Divisionwide, FCPS has created a comprehensive Continuity of Operations (COOP) program. This program aims to ensure the continuation of essential functions during disruptions by using Business Continuity Plans (BCP). The BCP template guides divisions in documenting plans for maintaining critical operations, identifying essential functions, resources, and staff. It also addresses communication strategies, essential record management, and the reconstitution process to return to normal operations. The goal is to develop a resilient FCPS-wide system to prevent, protect against, and recover from risks. The COOP program includes a management cycle of planning, testing, evaluation, and improvement.

The goal of the FCPS BCP is a secure and resilient organization with the capabilities required to prevent, protect against, mitigate, respond to, and recover from the threats and hazards that pose the greatest risk. FCPS has a Senior Manager of Emergency Management & Business Continuity to support and ensure implementation and manage a comprehensive Continuity program that helps organize and improve current continuity plans, following a program management cycle. This work includes developing plans and procedures, conducting tests, training, and exercises, developing evaluations, After Action Reports (AARs), and lessons learned, developing improvements, and developing and implementing an approval process and safe keeping of the plans.

### **Ensure essential division-wide practices are uniformly documented, communicated, and available to staff to ensure consistent interpretation and application.**

All FCPS departments have submitted documentation of their major activities in a Google drive. As of this memo, there is no standard template for internal documentation, such as SOPs or project management templates. Additionally, there is not currently one repository for all employees to access the documentation of our division-wide practices. FCPS will assemble a working group to create templates for SOPs, project management plans, and new hire handbooks. In addition, this working group will ensure that there is a central repository for these documents.

To align with the Baldrige application deadline, this work will be complete by **January 2026**.

### **Explore opportunities to further embed knowledge management strategies in FCPS.**

*While many knowledge management practices exist throughout the division, additional opportunities to embed knowledge management exist.*

## **Knowledge Management Software**

FCPS is launching a new, enhanced Intranet site, Atlas, to provide employees:

- **Centralized Knowledge Repository:** Atlas consolidates company information into a unified platform, making it easier for employees to access and share knowledge. This centralization reduces information silos and ensures that critical data is readily available.
- **AI-Powered Search:** The platform's advanced search capabilities, including features like "Smart Answers," allow employees to quickly find relevant information across enterprise data. This functionality enhances productivity by providing instant, accurate responses to queries.
- **Personalized Content Delivery:** Atlas delivers tailored content to users based on their roles and preferences, ensuring that employees receive information pertinent to their needs. This personalization enhances engagement and knowledge retention.

- **Social Features for Collaboration:** Features such as commenting, liking, and sharing enable interactive communication among employees, fostering a collaborative environment that promotes knowledge sharing and community building.
- **Integration with Other Tools:** Atlas integrates seamlessly with existing enterprise applications, such as Google, which allows for a cohesive digital workplace where information from various sources is accessible in one place.

This platform is planned to roll out in **SY 2025-26**.

### **Data Governance Team**

Fairfax County Public Schools (FCPS) has an opportunity to streamline and enhance its data personnel structure by adopting a systematic, enterprise-wide data management framework. The current decentralized model, with data specialists embedded across departments using disparate systems and definitions, limits the district's ability to leverage data effectively to enhance knowledge management. This team would use the expertise of current roles in FCPS. This team will begin its work by **September 2025**.

#### **Summary of Deliverables:**

<b>Project</b>	<b>Due Date</b>
Baldrige Framework review	April 2025 (25 page) December 2025 (50 page)
In-person onboarding pilot	July 2025
Manager's Guide to Onboarding for operational managers	August 2025
New, enhanced Intranet site, Atlas	SY 2025-26
Establish a Data Governance Team	September 2025
Entry plans for senior leaders	September 2025
Standard templates for SOPs, project management plans, and new hire handbooks, along with central repository	January 2026
Standardized exit plan template for chiefs, assistant superintendents, principals, and directors	September 2026