



**BUILDING FOR
EXCELLENCE**

January 13, 2024

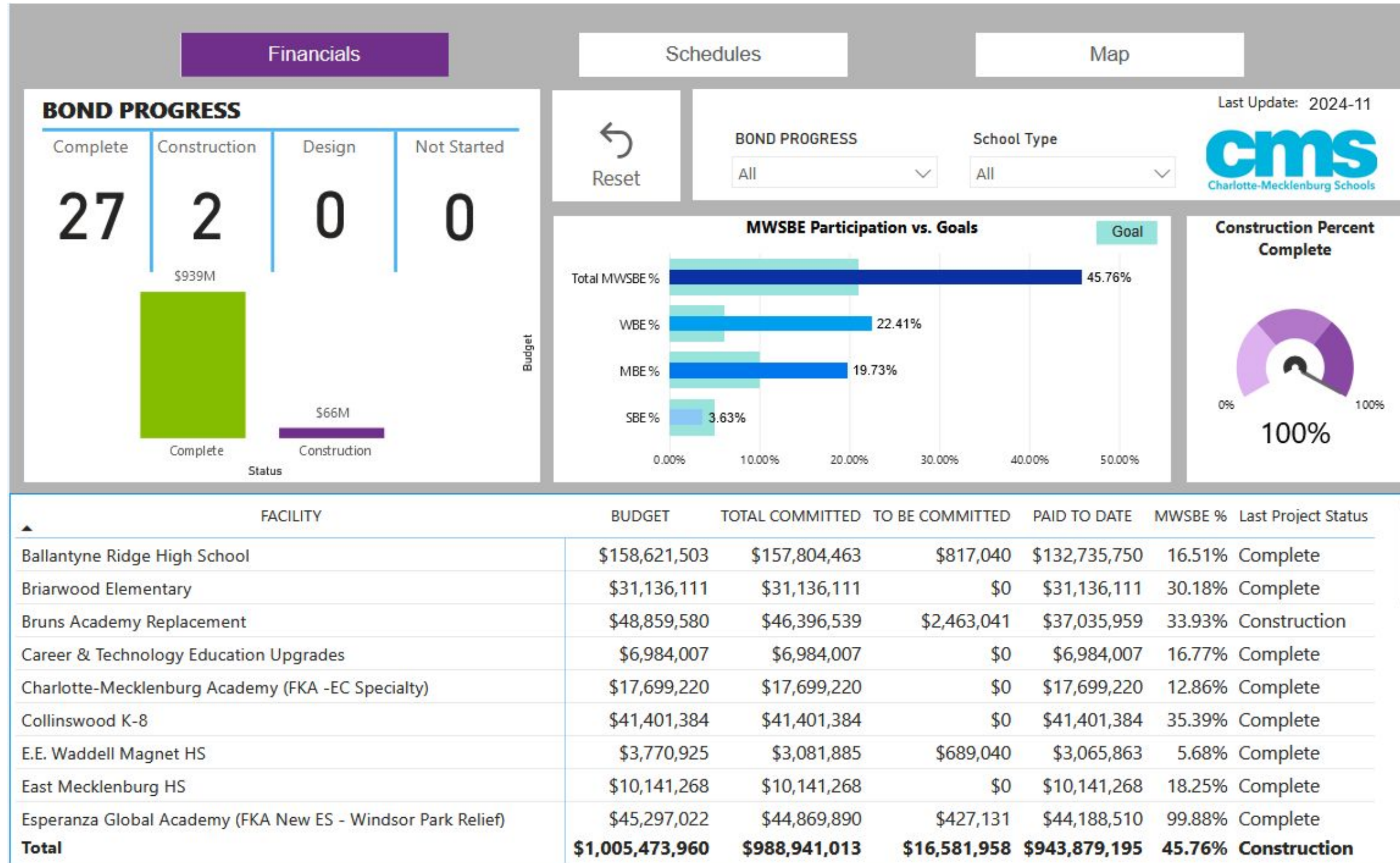
Progress Update: 2017 & 2023 Bonds





2017 Bond Program

cmsbondconstruction.com





2017 Bond Program



Bruns Avenue Elementary School (17)

November 2024



Project Information

Bond Program	2017 Bond
Facility Name	Bruns Avenue Elementary School (17)
Address	501 South Bruns Avenue Charlotte, NC 28208
Architect	ADW
Construction Manager	Edifice
Percent Complete	96%
Occupy On	August 2024

Scope of Work

New 45-classroom elementary school (K-5); replaces old school built in 1969.



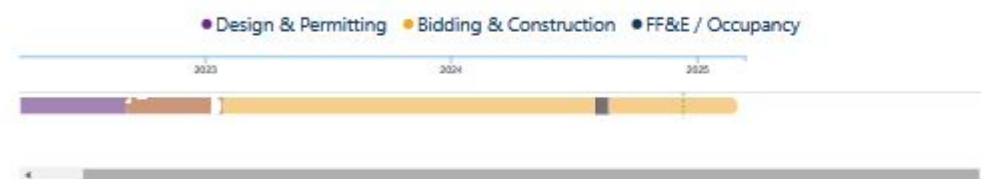
Project Status

The Bruns Avenue Elementary School Replacement project team has completed demolition of the building and the Phase 2 site work has started. The project team remains in constant communication with the Principal to ensure demolition and grading activities do not affect school activities. The Phase 2 work will continue through spring of 2025



Schedule

TASK	DUR	% Complete	START	FINISH
Design & Permitting	349	100.00%	February 2022	February 2023
Bidding & Construction	910	66.19%	September 2022	March 2025
Ff&E / Occupancy	20	100.00%	August 2024	August 2024



Financial Summary

Financial Summary Budget Contracts Expenditures MWSBE

FACILITY	BUDGET	TOTAL COMMITTED	TO BE COMMITTED	PAID TO DATE	MWSBE %
Bruns Academy Replacement	\$48,859,580	\$46,396,539	\$2,463,041	\$37,035,959	33.93%





2017 Bond Program

- **29** total projects
 - **28** will be complete at the start of second semester (January 26th) with the opening of a new building at South Mecklenburg HS
 - Sole outstanding work provides new parking and circulation to Bruns Avenue Elementary (school occupied August 2024)

- Information archived on www.cmsbondconstruction.com





**BUILDING FOR
EXCELLENCE**

2023 Bond: Progress Updates



2023 Bond Program



Albemarle Road MS
Allenbrook ES
Berryhill School
Beverly Woods ES
Billingsville/Chantilly Montessori
Cochrane Collegiate Academy
Cornelius ES
Cotswold ES
Coulwood STEM Academy
Dilworth MS
East Mecklenburg HS
First Ward Creative Arts
Garinger HS
Harding University HS
Huntersville ES
J.T. Williams Montessori Secondary/
Montessori Secondary at Marie G. Davis
Matthews ES
New ES at Park Road
New Second Ward Medical & Technology HS
New MS #1
New MS #2
New MS #3

North Mecklenburg HS
Northwest School of the Arts
Sedgefield Montessori
South Mecklenburg HS
South Charlotte MS
Steele Creek ES
University Park Creative Arts
Villa Heights ES
E.E. Waddell HS
West Regional Athletic Complex
Wilson STEM Academy

30
PROJECTS

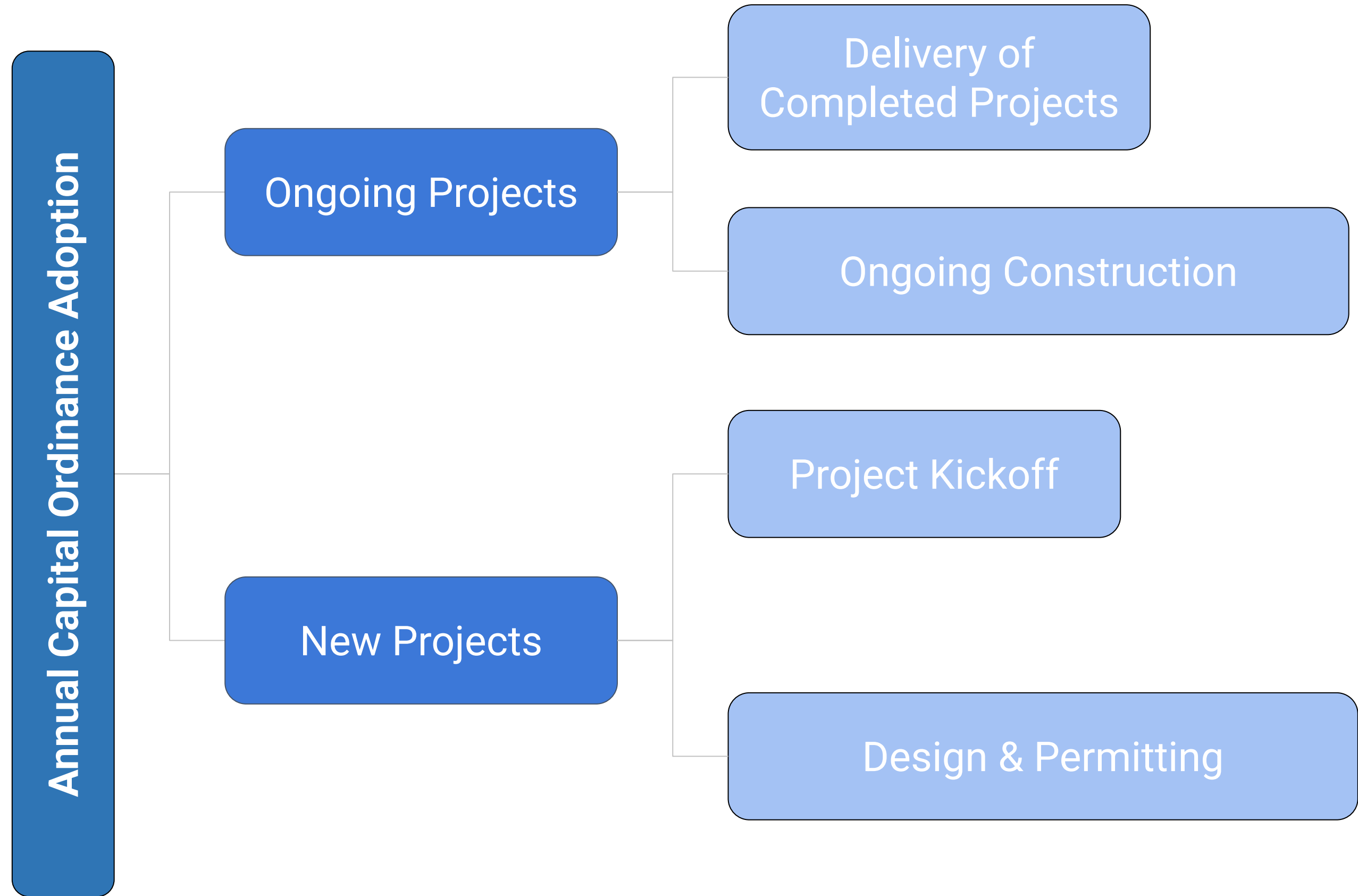
\$2,500,000,000
ESCALATED
BOND
REFERENDUM
TOTAL



Project Execution Process

Project Order Considerations

- Cash Flow
- Capacity
- Condition
- Logistics
- Stewardship





Projected Completion Timelines for Projects Approved in the 2023 and 2024 Annual Capital Ordinances:

August 2025

Sedgefield Montessori

August 2026

First Ward Creative Arts MS

Marie G. Davis Montessori Secondary*

New Middle School #1

Northwest School of the Arts HS

New ES at Park Road

August 2028

Berryhill School

Beverly Woods ES

Huntersville ES

New Second Ward Medical & Technology HS

New Middle School #2

North Mecklenburg HS

August 2027

Billingsville Montessori

Cotswold ES

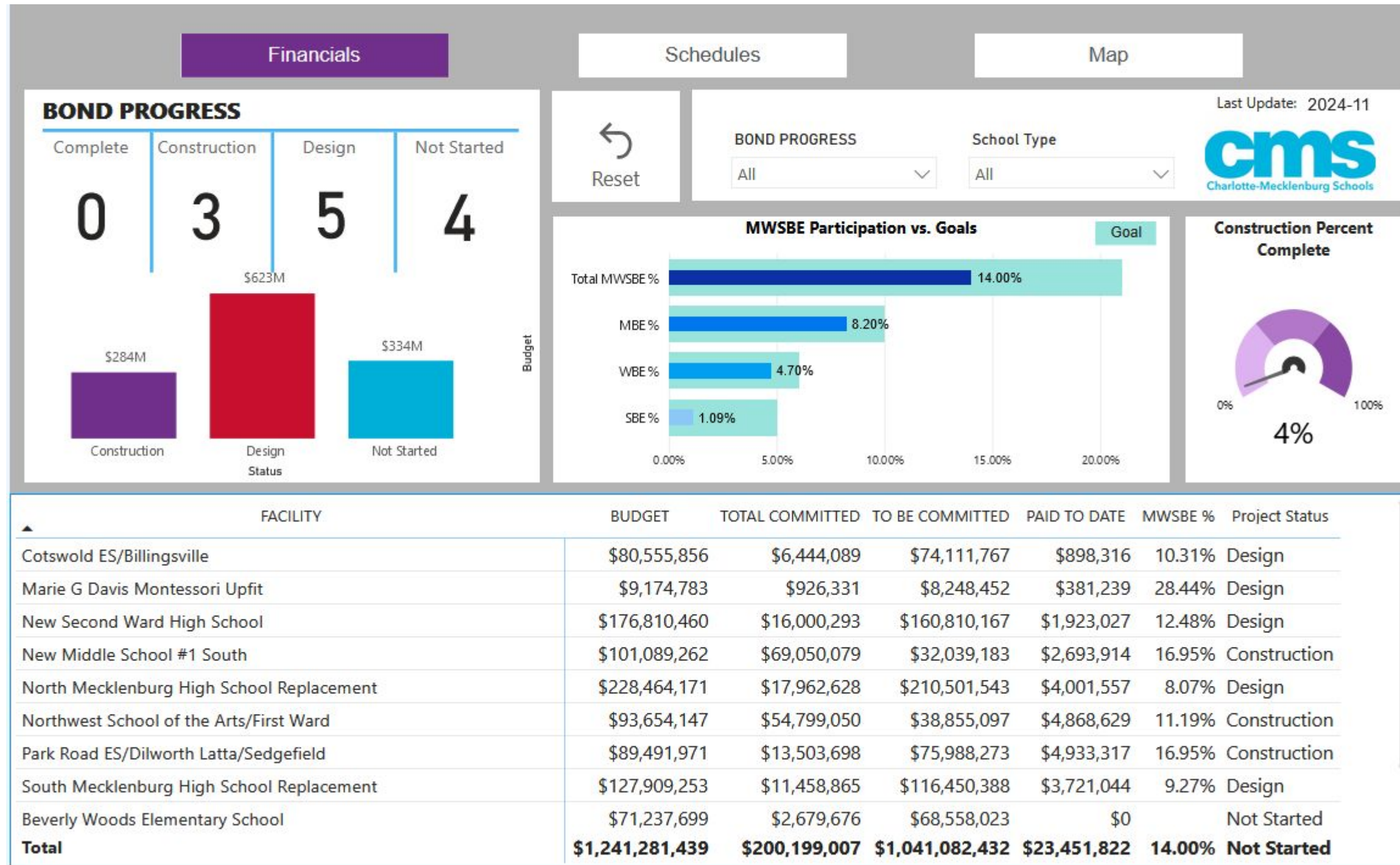
Dilworth MS

South Mecklenburg HS



2023 Bond Program

cmsbondconstruction.com





Project Reports



New Middle School 1 South (23)

November 2024



Project Information

Bond Program	2023 Bond
Facility Name	New Middle School 1 South (23)
Address	5400 Campe Verde Lane Charlotte, NC 28277
Architect	Hord Coplan Macht, Inc.
Construction Manager	Messer Construction Company
Percent Complete	1%
Occupy On	August 2026

Schedule

TASK	DUR	% Complete	START	FINISH
Design & Permitting	383	95.39%	September 2023	September 2024
Bidding & Construction	708	2.65%	August 2024	July 2026
Ff&E / Occupancy	25	0.00%	August 2026	August 2026

● Design & Permitting
 ● Bidding & Construction
 ● FF&E / Occupancy

Scope of Work

Baseline 54-classroom Middle School facility to relieve Community House MS, Jay M. Robinson MS and Rea Farms STEAM K-8.



Project Status

The New South Middle School 1 project started this month with Board approval and issuance of notice to proceed. The site is being prepared with perimeter gates and fencing. Utilities including gas and power is being turned off and removed from the site. The project consists of a new 54-classroom middle school. The new school is scheduled for completion in August 2026.



Financial Summary

Financial Summary Budget Contracts Expenditures MWSBE

FACILITY	BUDGET	TOTAL COMMITTED	TO BE COMMITTED	PAID TO DATE	MWSBE %
New Middle School #1 South	\$101,089,262	\$69,050,079	\$32,039,183	\$2,693,914	16.95%



Project Reports



North Mecklenburg High School Replacement (23)

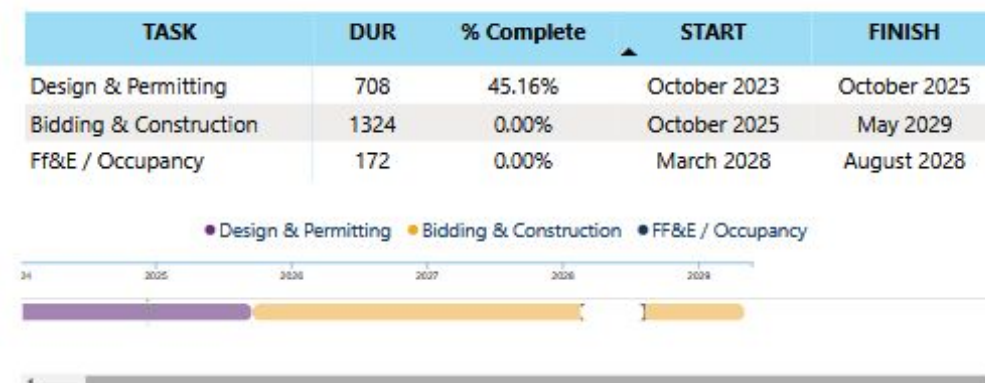
November 2024



Project Information

Bond Program	2023 Bond
Facility Name	North Mecklenburg High School Replacement (23)
Address	Old Statesville Road Huntersville, NC 28078
Architect	ADW Architects
Construction Manager	New Atlantic Contracting, Inc.
Percent Complete	0%
Occupy On	August 2028

Schedule



Scope of Work

Onsite replacement of balance of campus and comprehensive athletics package.

Project Status

The North Mecklenburg High School Replacement project has completed the design development phase; the architect is currently reviewing and incorporating comments into the project's design. The project update meeting was conducted at the school; interested parents, students and staff attended. As the design progresses, the construction manager continues to update logistics plans required to safely execute and coordinate the complex construction project. The project provides a full replacement of the comprehensive high school.



Financial Summary

Financial Summary Budget Contracts Expenditures MWSBE

FACILITY	BUDGET	TOTAL COMMITTED	TO BE COMMITTED	PAID TO DATE	MWSBE %
North Mecklenburg High School Replacement	\$228,464,171	\$17,962,628	\$210,501,543	\$4,001,557	8.07%



Project Reports



New Second Ward High School (23)

November 2024



Project Information

Bond Program	2023 Bond
Facility Name	New Second Ward High School (23)
Address	TBD
Architect	LS3P Associates
Construction Manager	Rodgers Builders, Inc. in Association with Walter B. Davis Company
Percent Complete	0%
Occupy On	August 2028

Schedule

TASK	DUR	% Complete	START	FINISH
Design & Permitting	687	46.38%	November 2023	September 2025
Bidding & Construction	951	0.00%	September 2025	April 2028
FF&E / Occupancy	122	0.00%	April 2028	August 2028



Scope of Work

Full magnet high school on old Metro site; relocate program from Hawthorne site.



Project Status

The New Second Ward High School project schematic design is being reviewed by CMS. The new medical high school project consists of classrooms with a focus in health curriculum. The demolition of the old Metro School located on the site is underway. Once the site is cleared (spring 2025), additional geotechnical testing for design will occur in preparation for construction of the new school building that is scheduled to start in early 2026.



Financial Summary

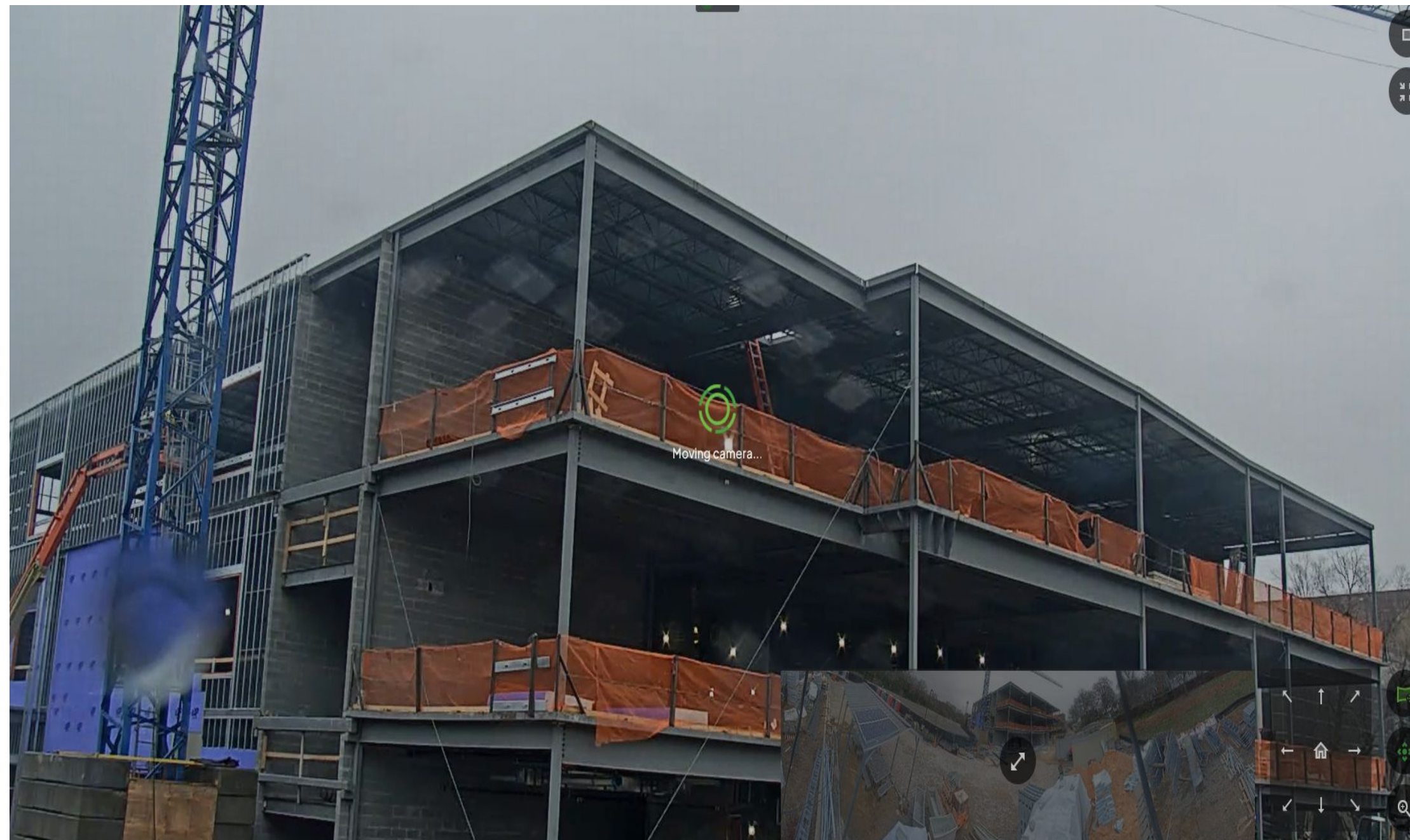
Financial Summary Budget Contracts Expenditures MWSBE

FACILITY	BUDGET	TOTAL COMMITTED	TO BE COMMITTED	PAID TO DATE	MWSBE %
New Second Ward High School	\$176,810,460	\$16,000,293	\$160,810,167	\$1,923,027	12.48%



Projects in Process

Northwest School of the Arts



Here is a example of Bruns Avenue Elementary construction in progress.

Bruns Avenue Elementary

cmsbondconstruction.com

CHARLOTTE-MECKLENBURG SCHOOLS




Building for Excellence, Together

- For all updates, dashboards, live cameras, and reports: www.cmsbondconstruction.com
- For a schedule of specific project meetings and engagement sessions: <https://cmsbondconstruction.com/#Calendar>

Follow us on social media for updates!



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2025-26 Budget Process

Budget Cycle & Strategic Plan Alignment

CMS Board of Education
Sets the "What - Vision & Values of our Community"
Student Outcome Focused Goals (SOFG)

Superintendent
Presents Budget Recommendation to Board of Education with confidence that all requests are in alignment with the Board's SOFG Goals

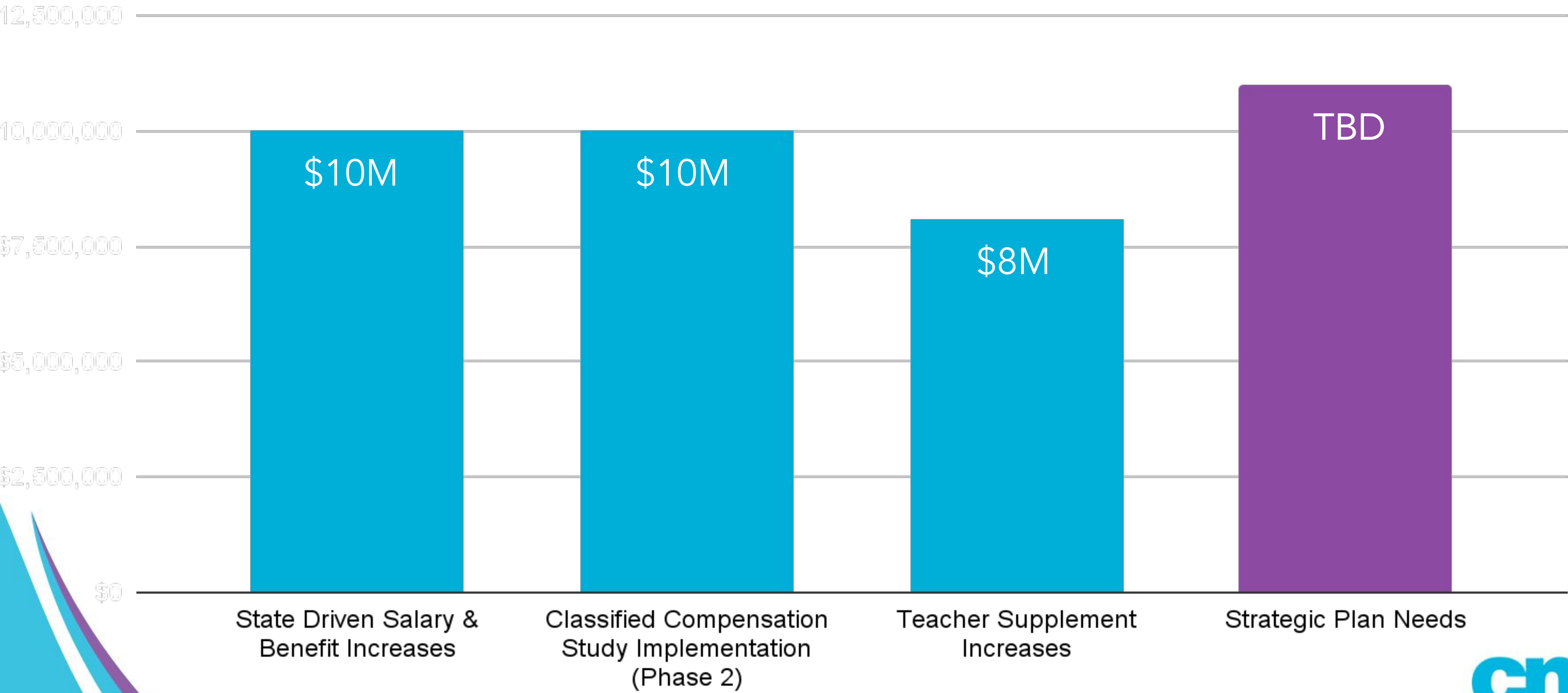
Superintendent
Determines "How" to accomplish the Goals through the Strategic Plan

Divisional Chiefs
Submits budget requests in alignment to resources needed in order to accomplish the Annual Plans

Divisional Chiefs
Develops and supports Divisional Annual Plans which are aligned to the Strategic Plan

Department Heads & Support Staff
Executes the work identified within the Divisional Annual Plans

2025-26 Anticipated Identified Needs




5-Year Financial Forecast

Charlotte Mecklenburg Schools Five-Year Financial Forecast FY 2025 - 2029


Operational / Strategic Plan Requests	Request	Estimated Budgetary Impact	Strategy	Fiscal Year				
				24-25	25-26	26-27	27-28	28-29
Strategic Plan	Increase Teacher Supplements	43,456,020	PE.1	\$7,400,000	\$8,066,000	\$8,791,940	\$9,319,456	\$9,878,624
	Data Storage and Platforms	500,000	OE.2		\$500,000			
	Device Replacement Cycle*	18,500,000	OE.2	\$4,000,000	\$4,000,000	\$4,000,000	\$4,000,000	\$2,500,000
Operational	State Driven Salary + Benefit Increases	51,645,955	OE.2	\$6,800,000	\$9,898,000	\$10,788,820	\$11,813,758	\$12,345,377
	Opening of New Schools	1,800,000	OE.2	\$1,800,000	\$0	TBD	TBD	TBD

*Note that this forecast is assuming the inclusion of K-3 and Staff Device Refresh Cycle



Aligning Budget Requests to the Strategic Plan

Strategic Plan Alignment



**Charlotte-Mecklenburg Schools
Strategic Plan
2024–2029**



Empower academic success

Deliver efficient operations

Enable a thriving workforce

Forge strong community partnerships

Strategic Plan Alignment

Step 1 - Identify Needs

Step 2 - Trade Offs

Step 3 - Risks

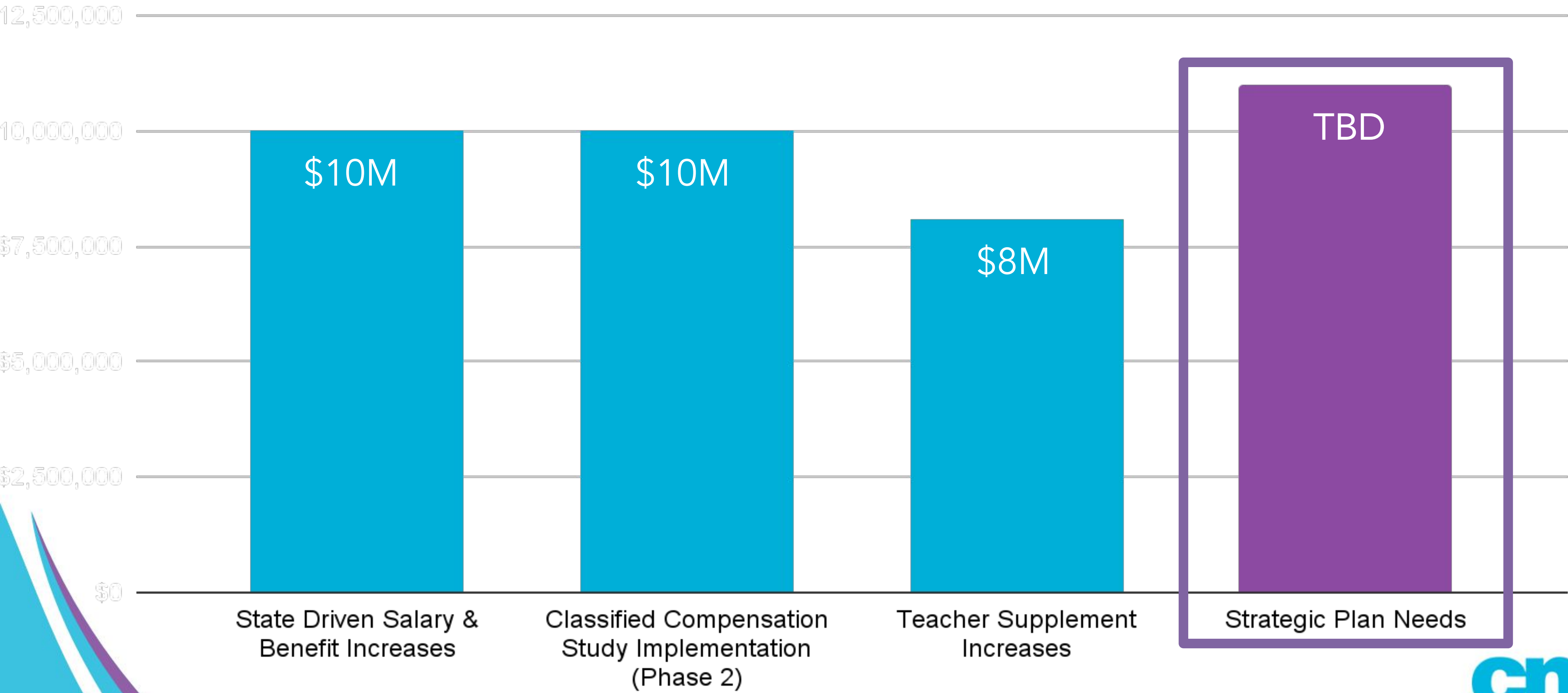
CURRENT BUDGET & INCREMENTAL BUDGET REQUESTS

	Request	Key Information & Context	Incremental Funding Needed	Funded within Current Budget
Labor				
			1,820,188	
Non-Labor				
			869,645	
Total			2,689,833	
	ParentSquare	This will be the first year ParentSquare is fully funded through Communications	\$590,000	-
	Marketing Specialist	Multiple contractor are currently used throughout the district	\$200,000	-
	Studio Upgrades	Updates to video and sound equipment to support production quality	-	\$20,000
	Niche	Online housing platform that determines school grades and ratings	-	\$30,000
	Total :		\$790,000	\$50,000

POTENTIAL TRADE OFFS & RISKS

Request	Funding Needed	Trade Offs	Risk
ParentSquare	\$590,000	<ol style="list-style-type: none"> No identified tradeoff: ParentSquare funding amount is \$590k of ~\$800k per school budget, roughly 75% of Communication budget. Large and would take up most of Communications Budget 	<ul style="list-style-type: none"> - Retention of Staff - No two-way communication - Loss in ability to translate messages to all families/stakeholders
Marketing Specialist	\$150,000	<ol style="list-style-type: none"> Only available tradeoff is cutting the current Marketing Contracting services to fund a permanent position within Communications Department 	<ul style="list-style-type: none"> - Lower enrollment (especially in magnet programs) - Recruitment difficulty - Retention of staff

2025-26 Anticipated Identified Needs



FY25 Operating Budget

Special Revenue

4.4%

Federal

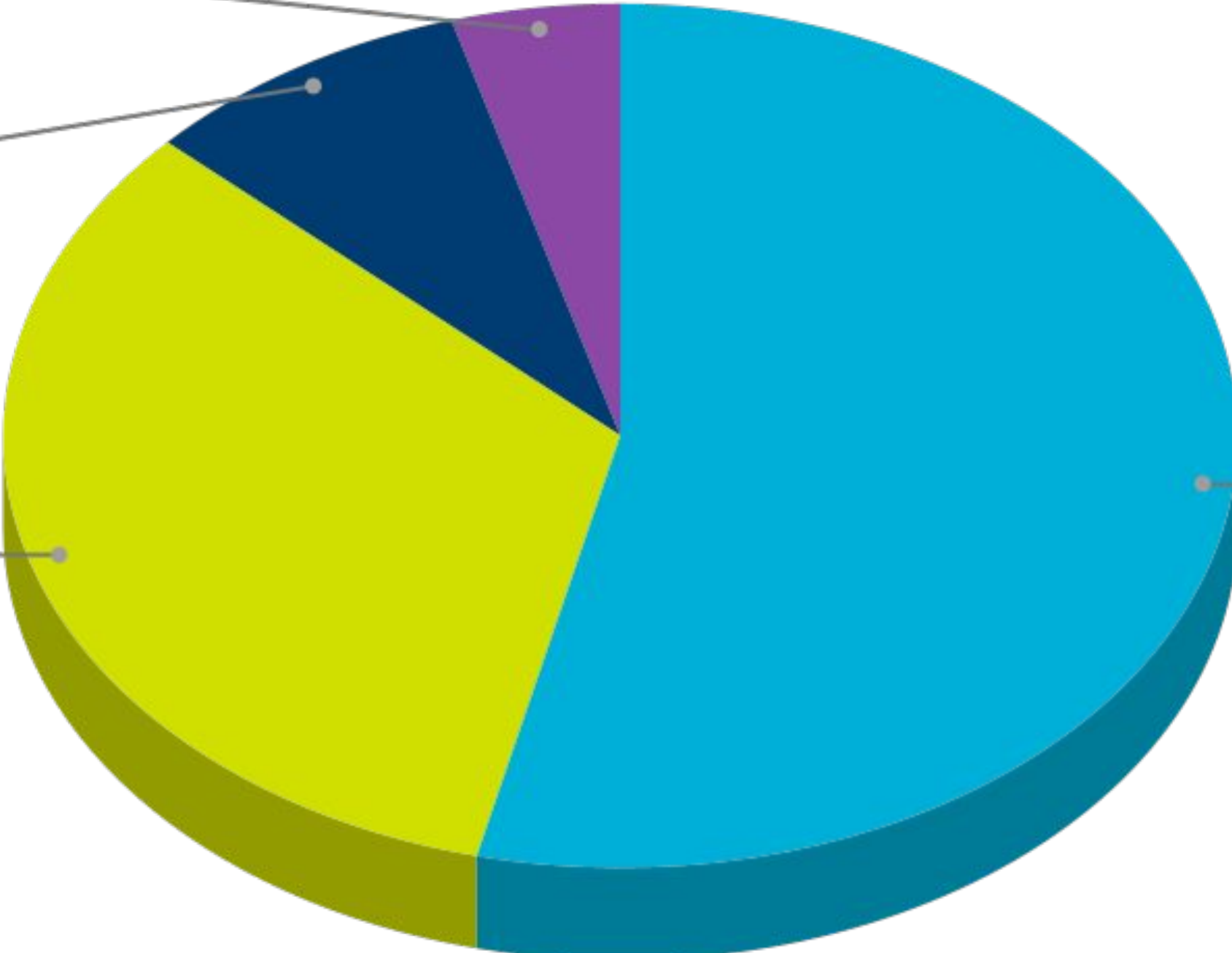
8.7%


Local

33.1%

State

53.7%





Budget Timeline

2025-26 Budget Timeline

November -
December 2024

Budget Development
Planning with Cabinet

Annual Plan Reviews
with Divisions

January -
February 2025

Divisional Budget Discussions
with Superintendent and
Chief Finance Officer

Joint Meeting
BOCC & CMS BOE

CMS Advisory Committee
Budget Engagement Sessions

CMS BOE Budget Work
Session

Employee Engagement
Session

March 2025

Community Engagement
Sessions

Budget Updates at
CMS Leadership Meeting

Budget Report presented to
CMS BOE

CMS Advisory Committee
Budget Engagement Sessions

Presentation of the 2025-26
Budget Recommendation to
the CMS BOE

April 2025

Community Engagement
Sessions

Public Hearing on
Superintendent's Budget
Recommendation

CMS BOE vote on 2025-26
Budget Recommendation

May 2025 & Beyond

CMS BOE presents Budget
Recommendation to
Mecklenburg BOCC

Mecklenburg BOCC Recommended
Budget Presentation, Public
Hearing, & Budget Adoption

State of North Carolina Adopts
2025-26 Budget

Presentation of Amended 2025-26
Budget Recommendation to CMS
BOE, Public Hearing, &
Recommendation

In Partnership: Closing Remarks



Appendix

2024-25 Area of Focus: Organized for Success

Directly Goal Aligned Projects

P01: Provide Comprehensive Curriculum & PD
P02: High Dosage Tutoring
P03: Core Action Walkthroughs
P05: High Needs Vacancy Monitoring
P07: Learner Profiles and Future Pathways
P08: Career Exploration via Community Partnerships
P10: MTSS for Accelerated Learning
P11: Family & Community Partnership Communication
P12: Providing Variety of Opportunities
P13: Community Partnerships & Student Wellness
P14: Attendance
P15: SEL & Student Discipline
P16: Recruitment & Retention
P18: Onboarding New Employees
P19: Compensation & Incentive Plans
P20: Professional Development
P22: Staff Wellness
P24: District Wide Coaching Model
P35: Family Academy
P37: Summer Programming

Indirectly Goal Aligned Projects

P06: SIP Planning & Alignment
P09: Pre-K Opportunities
P17: Housing
P21: Succession Planning
P23: District Planning
P25: Districtwide Performance Management Evaluation Systems
P26: Work Order Process
P27: Business Modernization System
P28: Device Life Cycle Protocol
P29: Preparation for Transition to Infinite Campus
P30: Service Now
P31: Data Reporting Platform Modernization
P32: Data Driven Continuous Improvement
P33: AI
P34: Local and State Coalitions
P36: Internal Communication Structures



2017 & 2023 Bond APPENDIX



D1 Elaine Powell

Cornelius ES
Huntersville ES
New MS #2
North Mecklenburg HS

D2 Vilma Leake

Allenbrook ES
Berryhill School
Coulwood STEM Academy
E.E. Waddell HS
Harding University HS
Northwest School of the Arts
Steele Creek ES
University Park Creative Arts
West Regional Athletic Complex
Wilson STEM Academy

D3 George Dunlap

Cochrane Collegiate Academy
Garinger HS
J.T. Williams Montessori Secondary/
Montessori Secondary at Marie G. Davis
Villa Heights ES

D4 Mark Jerrell

Albemarle Road MS
Billingsville/Chantilly Montessori
Dilworth MS
East Mecklenburg HS
First Ward Creative Arts
New Second Ward Medical & Technology HS

D5 Laura Meier

Beverly Woods ES
Cotswold ES
Sedgefield Montessori
New ES at Park Road
South Mecklenburg HS

D6 Susan Rodriguez-McDowell

Matthews ES
New MS #1
New MS #3
South Charlotte MS

30
PROJECTS

\$2,500,000,000
ESCALATED
BOND
REFERENDUM
TOTAL



D1 Melissa Easley

Cornelius ES
Huntersville ES
New MS #2
North Mecklenburg HS

D2 Thelma Byers-Bailey

Allenbrook ES
Berryhill School
Coulwood STEM Academy
Dilworth MS
First Ward Creative Arts
Harding University HS
J.T. Williams Montessori Secondary/
Montessori Secondary at Marie G. Davis
New Second Ward Medical & Technology HS
Northwest School of the Arts
Steele Creek ES
University Park Creative Arts
West Regional Athletic Complex
Wilson STEM Academy

D3 Gregory "Dee" Rankin

Cochrane Collegiate Academy
Garinger HS

D4 Stephanie Sneed

Albemarle Road MS
Billingsville/Chantilly Montessori
East Mecklenburg HS
Villa Heights ES

D5 Lisa Cline

Beverly Woods ES
Cotswold ES
Matthews ES
New ES at Park Road
Sedgefield Montessori

D6 Summer Nunn

E.E. Waddell HS
New MS #1
New MS #3
South Charlotte MS
South Mecklenburg HS

30
PROJECTS

\$2,500,000,000
ESCALATED
BOND
REFERENDUM
TOTAL



ES/PK-6

Allenbrook ES
Beverly Woods ES
Billingsville/Chantilly Montessori
Cornelius ES
Cotswold ES
Huntersville ES
First Ward Creative Arts
Matthews ES
New ES at Park Road
Sedgefield Montessori
Steele Creek ES
University Park Creative Arts
Villa Heights ES

MS/K-8

Albemarle Road MS
Berryhill School
Cochrane Collegiate Academy
Coulwood STEM Academy
Dilworth MS
New MS #1
New MS #2
New MS #3
South Charlotte MS
Wilson STEM Academy

HS

East Mecklenburg HS
Garinger HS
Harding University HS
J.T. Williams Montessori Secondary/
Montessori Secondary at Marie G. Davis
New Second Ward Medical & Technology HS
North Mecklenburg HS
Northwest School of the Arts
South Mecklenburg HS
E.E. Waddell HS

Special/Other

West Regional Athletic Complex

30
PROJECTS

\$2,500,000,000
ESCALATED
BOND
REFERENDUM
TOTAL

Types of bond projects in the 2023 Bond:



- **Replacement**
 - Existing school facility or portions of a campus are replaced by new construction
- **Onsite Replacement**
 - Current school facility will be replaced on the same school site; school will continue to operate in existing facility until new school is complete
- **Renovation**
 - Areas of a school facility that will be updated to enhance the educational environment and/or support programmatic changes
- **New Relief School**
 - A newly constructed school facility explicitly for relief of existing overcapacity situations
- **Design**
 - The first phase of the process to develop a school; design must be completed and permits secured prior to starting construction

2023 Bond Referendum



South Mecklenburg HS	Final phases of work, to include onsite replacement of balance of campus to +/- 100 classroom baseline, comprehensive athletics package	\$127,909,253
Northwest School of the Arts/ First Ward	Final phase of work, to include new specialty classroom space and 9-12 conversion/expansion; renovate First Ward as full magnet 6-8.	\$93,654,147
New MS #1	Baseline 54 classroom facility to relieve Community House MS, Jay M. Robinson MS, and Rea Farms STEAM K-8	\$101,089,262
Beverly Woods ES	Onsite replacement with 45 classroom baseline school	\$71,237,700
Wilson STEM Academy	Onsite replacement with 54 classroom baseline facility	\$92,471,565
Huntersville ES	Onsite replacement with 45 classroom baseline facility	\$66,235,904
Park Road Montessori/ Dilworth ES/ Sedgefield ES	Relocate Montessori PK-6 program to converted Sedgefield ES; replace PRM with 45 classroom school for Dilworth paired schools; repurpose Dilworth for a TBD magnet MS use	\$89,491,970
Cotswold ES/ Chantilly Montessori/ Billingsville ES	Onsite replacement of Cotswold ES with a 45 classroom facility, collapsing paired school into Billingsville for project duration; repurpose Billingsville for relocated Montessori PK-6 program; demolish Chantilly	\$80,555,856
New Second Ward Medical & Technology HS	Full magnet high school on old Metro site; relocate program from Hawthorne site	\$176,810,460
Coulwood STEM Academy	Onsite replacement with 54 classroom baseline facility; STEM program to remain	\$92,706,982

2023 Bond Referendum



North Mecklenburg HS	Final phase, to include onsite replacement of balance of campus, comprehensive athletics package	\$228,464,171
Matthews ES	Replacement with 45 classroom baseline facility	\$79,874,929
Albemarle Road MS	Onsite replacement with 54 classroom baseline facility	\$97,732,036
University Park Arts	Onsite replacement with 39 classroom baseline facility with arts-specific spaces to support program	\$73,119,088
New MS #2	Baseline 54 classroom facility at Stumptown Road to relieve Bailey Road MS, Davidson K-8, and J.M. Alexander MS	\$92,371,482
Allenbrook ES	Offsite replacement at Freedom Driving Range with a 45 classroom baseline school; demolish existing facility	\$74,244,220
Garinger HS	Next phase of work, to include new kitchen/cafeteria, specialty classrooms, gym, and athletics; renovate and repurpose existing kitchen/cafeteria	\$54,905,692
Harding University HS	Final phases of work, to include comprehensive athletics package and balance of campus replacement	\$202,879,499
East Mecklenburg HS	Final phases of work, to include replacement of balance of campus buildings; comprehensive athletics package	\$201,339,353
Steele Creek ES	Onsite replacement with 45 classroom baseline facility	\$80,830,528

2023 Bond Referendum



Cornelius ES	Onsite replacement with 45 classroom baseline facility	\$76,471,997
Berryhill School	Offsite replacement with 54 classroom baseline facility; demolish building	\$104,286,451
Montessori Secondary @ Marie G. Davis	Convert to 7-12 Montessori to replace use at J.T. Williams and expand program; complete renovations at J.T. Williams for use by alternative education programs	\$9,174,783
New MS #3	54 classroom baseline facility on HWY 160 to relieve Southwest and Kennedy middle schools	\$98,436,153
Cochrane Collegiate Academy/iMeck	DESIGN ONLY - Onsite replacement with 54 classroom baseline facility; relocate 9-12 iMeck program to Garinger HS	\$7,506,657
E.E. Waddell HS	DESIGN ONLY- Building addition to support program(s)	\$1,563,349
Villa Heights ES	DESIGN ONLY - 45 classroom baseline school to be constructed on the Hawthorne site; demolish existing Villa Heights	\$6,247,870
South Charlotte MS	DESIGN ONLY - Onsite replacement with 54 classroom baseline facility	\$7,741,099
J.T. Williams	DESIGN ONLY - Final phase of work to support Alternative Education use	\$1,647,753
West Regional Athletic Complex	DESIGN ONLY - New multi-sport regional athletic competition complex with gymnasium; natatorium; stadium; fields; ancillary spaces	\$8,999,791



Building for Excellence

- Bringing modern, safe schools to students across Mecklenburg County
- Expanding programmatic offerings and supporting our curriculum
- Investing responsibly by addressing capacity needs through the replacement of aging facilities
- Demonstrating that our community values our teachers and students





2023 Bond Program

- Subset of the Capital Needs Assessment (CNA)/“Ten Year Plan”/Long Range Facilities Master Plan containing 125 total projects needed to remain current on facility condition and capacity issues
- Developed through community engagement and prioritized through use of a rubric:

	500	400	400	300	300	100	-500
Educational Environment							
Current CR Utilization							
Condition							
Lifecycle							
Mandates/ Initiatives							
Continuity							
Logistics							

