AUSD Redesign Project Update - Part 1

January 26, 2010

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Objectives of Project

- To identify opportunities to save District funds.
- To assess the efficiency and effectiveness of the District Office as the District Office moves to a service organization model in which its primary function is to support the schools in delivering a quality education to every student in Alameda.
- To assure the Alameda community that the District Office is operating without waste.
- To develop solid metrics by which the performance of the District Office can be continually monitored and improved.

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AUSD District Office Redesign Methodology

Phase 1 (10/19/09 - 11/16/09)

Phase 2 (11/17/09 - 1/26/10)

Phase 1: Assessment

8 Director Interviews

1 Director Level Scoping Analysis

3 Focus Groups (13 participants, total)

Phase 2: Detailed Analysis & Redesign

42 Job Analysis interviews

14 Cross-Departmental Process Maps/ Gap Analysis

5 Brief Benchmarking activities

Identification of multiple "silo'ed" databases

8 departments redesigned (1 department only had partial small redesign)

1 Change Management Plan, including benefits analysis

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Phase 1

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Director Interviews

- 8 interviews conducted

- Purpose: overview of scope of work, get input on Phase 2

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Focus Groups

- 3 Focus Groups held: Principals, Teachers, Office Managers

- For each District department: What's Working/Not Working
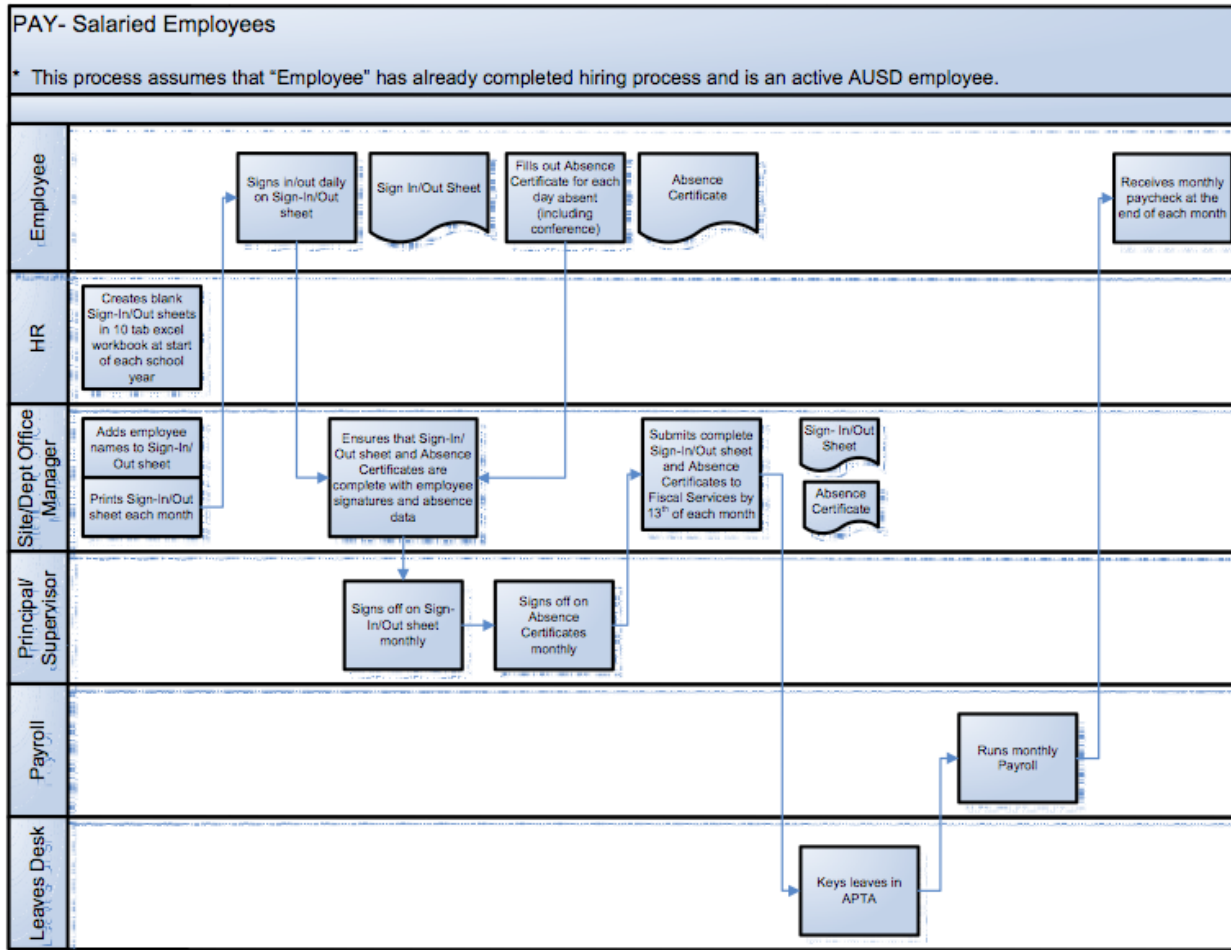
- Identification and prioritization of "major pain points"

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Phase 2

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Process Mapping / Gap Analysis

- Selection of processes heavily driven by focus group input

- 14 processes mapped

- Gap Analysis performed for all 14 processes

- Gap analysis informed organizational recommendations

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Example: Process Map

PAY- Salaried Employees

* This process assumes that "Employee" has already completed hiring process and is an active AUSD employee.

Employee
- Signs in/out daily on Sign-In/Out sheet
- Sign In/Out Sheet
- Fills out Absence Certificate for each day absent (including conference)
- Absence Certificate
- Receives monthly paycheck at the end of each month

HR
- Creates blank Sign-In/Out sheets in 10 tab excel workbook at start of each school year

Site/Dept Office Manager
- Adds employee names to Sign-In/Out sheet
- Prints Sign-In/Out sheet each month
- Ensures that Sign-In/Out sheet and Absence Certificates are complete with employee signatures and absence data
- Submits complete Sign-In/Out sheet and Absence Certificates to Fiscal Services by 13th of each month
- Sign- In/Out Sheet
- Absence Certificate

Principal/ Supervisor
- Signs off on Sign-In/Out sheet monthly
- Signs off on Absence Certificates monthly

Payroll
- Runs monthly Payroll

Leaves Desk
- Keys leaves in APTA

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Example: Gap Analysis

Pay- Salaried Employees

Pain Point	Role/Technology/ Process/ Communication
The Employee Attendance sheet referred to as the "Sign-In/Out sheet" is often not filled out completely, accurately, or legibly by the employee. This creates significant time drain for the Leaves Desk and Payroll to research each individual employee's issue. When the Sign-In/Out sheet is left completely blank for an employee, the Leaves Desk researches the attendance issues with the site and/or employee. There is a lack of clarity as to how to accurately account for short absences when the employee neglects to complete one or two days on the Sign-In/Out sheet.	Technology
Responsibility for managing employee attendance is largely placed on Office Managers in current system. OM's have several other job duties and chasing employees around to ask them to fill out absence certificates and sign in/out sheets requires an inordinate amount of their time.	Process
Blank Sign-In/Out sheets are created at the beginning of the school year by HR with assistance from IT. Previously, sheets were posted on the "L" drive, but starting 2009/10 HR emailed them directly to sites. These excel sheets allow up to 100 rows for Employee Names, once names are entered on one sheet they auto-populate all other sheets (representing months) in the workbook. District should consider simply generating Sign-In/Out sheets directly from APTA.	Technology Process

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Jobs Analysis

- 42 Jobs Analyzed

- Choice of jobs to review heavily driven by input from Directors in Phase 1

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Organizational Recommendations

- Today:

  - Human Resources
  - Fiscal
  - MOF
  - Technology Services
  - Change Management Plan (Part 1)

- Next Board Meeting:

  - Assessment
  - Compliance/Curriculum
  - Student Services
  - Special Ed
  - Change Management Plan (Part 2)

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Human Resources Summary Findings

- Work of the Department tied to many cross-departmental processes: Hiring, Change of Status, Workers' Comp, Leaves Management (4), Pay (2)

- Staff time focused on tactical execution: filling daily substitute positions, hiring/on-boarding/change of status paperwork, employee records maintenance

- Much of the work is manually done, and multiple databases are being maintained

- Personnel Manager's scope of task responsibilities too large (and inter-dependent with others)

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Human Resources Recommendations

- Re-write and streamline task responsibilities of Personnel Manager
- Implement easy technology fixes (Edjoin, SubFinder, for example)
- Focus on implementing process improvement projects
- Add Clerical FTE
- After process improvement, routine paperwork will be greatly automated, multiple databases reduced, and more staff time spent on process improvement, systems, and handling exception cases (vs. routine paperwork)

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Fiscal
Summary findings

- Work of the Department tied to many cross-departmental processes: Hiring, Change of Status, Workers' Comp, Leaves Management (4), Pay (3), Health & Welfare Benefits, Retirement Benefits, Purchasing

- Many of these processes are not working, and much process improvement work is needed.

- Leaves Management, in particular, is complex and problematic.

- Time carding process very labor intensive and prone to errors

- APTA (the HR/Finance system) has enough flaws that it warrants some assessment of whether to continue with it.

- Need tighter controls for ensuring that revenue that is loaded into budgets are "real"

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Fiscal Recommendations

- Upgrade Leaves Desk position to bring in higher level of technical skills and process improvement/project management skills.

- Focus on implementing process improvement projects.

- Institute tightened revenue loading process.

- Assess APTA vs. business requirements

- After process improvement, less time spent on routine paperwork, leave balances are accurate, lessened District liability around administration of leaves and benefits associated with separation from AUSD, and better information to manage overtime spending.

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MOF
Summary Findings

- Work of the Department heavily impacted by the work order process.

- Work order system not working. Work orders go in, don't come out. Prioritization process currently has no meaning. Major process improvement project is needed.

- Not enough managerial structure and accountability focused on oversight of the work order pipeline.

- Office staff doing some work that should be done elsewhere.

- Need to utilize the expertise of frontline workers in developing work order process that works.

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MOF Recommendations

- Implement work order process improvement project.
- Re-focus role of Coordinator on oversight of work order pipeline
- Establish 2 "Lead" roles to play critical role of dispatching work, closing out work orders, and communicating with sites in a timely and accurate manner.
- Transfer tasks to other departments (bussing to sites, phone/pagers to Technology Services, invoicing and collections to Fiscal)
- After process improvement, there will be increased predictability of when work orders will be completed, increased communication on status or work orders, and implementation of a true prioritization system.
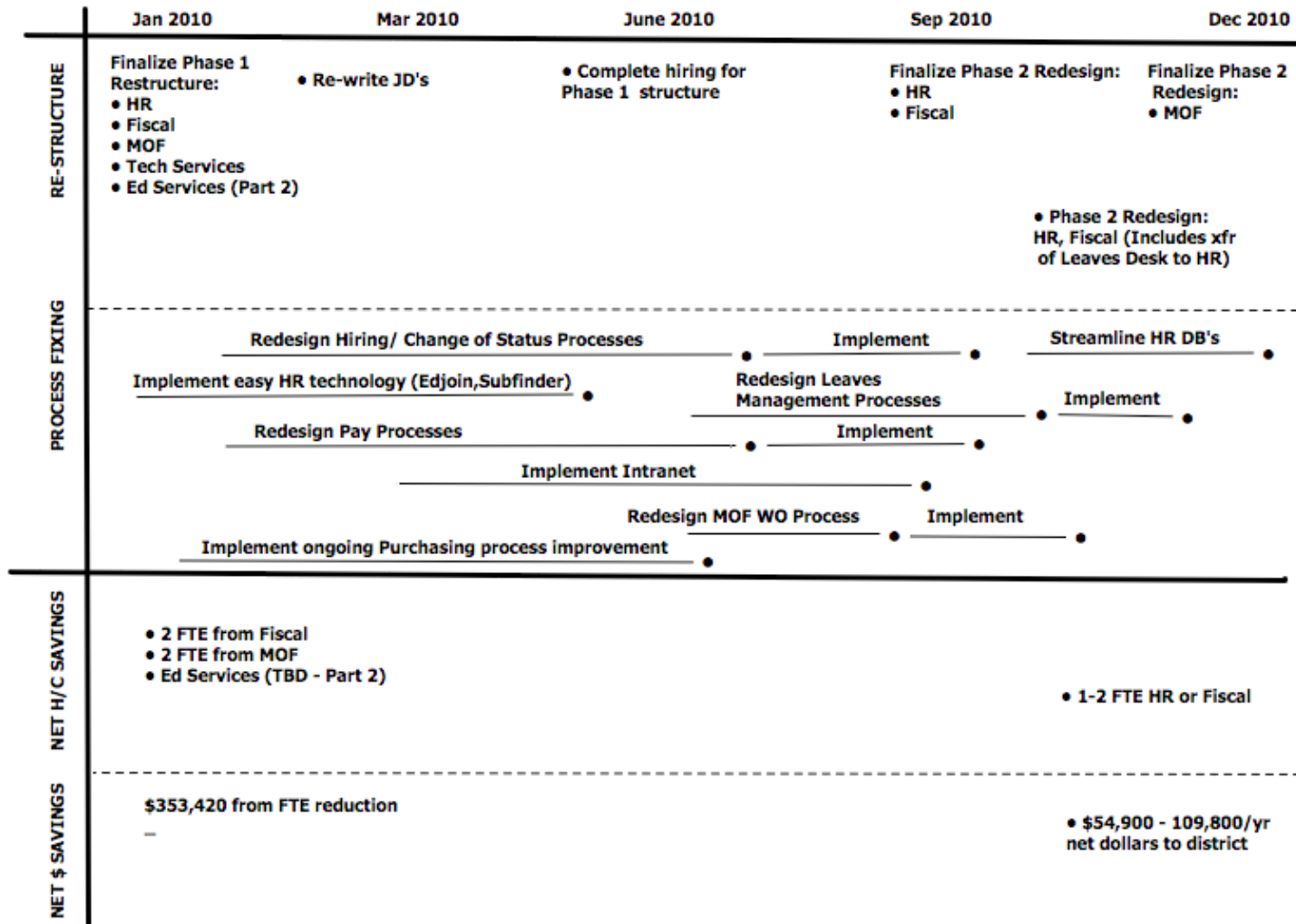
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Technology Services Summary Findings

- Strong focus on instructional technology and student information systems.

- No support of business systems: very little project work on business productivity or business support.

- Good cross-trained team with backup roles in place.

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Technology Services Recommendations

- "Re-mission" department to significantly increase technology support of business processes: participate as a partner on all process improvement projects, and implement technology needed to expedite process improvement work.

- Implement intranet (technical and editorial leadership).

- Integrate responsibilities from other departments into Technology Services (phones/pagers, data management for support of district assessments)

- While supporting business process improvement, institute formal project life cycle methodology and build capacity among business leaders to write business requirements.

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Overview: AUSD Change Management Plan (Part 1 only - Business Depts)

	Jan 2010	Mar 2010	June 2010	Sep 2010	Dec 2010

RE-STRUCTURE

Finalize Phase 1 Restructure:
• HR
• Fiscal
• MOF
• Tech Services
• Ed Services (Part 2)

• Re-write JD's

• Complete hiring for Phase 1 structure

Finalize Phase 2 Redesign:
• HR
• Fiscal

Finalize Phase 2 Redesign:
• MOF

• Phase 2 Redesign: HR, Fiscal (Includes xfr of Leaves Desk to HR)

PROCESS FIXING

Redesign Hiring/ Change of Status Processes   Implement   Streamline HR DB's

Implement easy HR technology (Edjoin,Subfinder)

Redesign Leaves Management Processes   Implement

Redesign Pay Processes   Implement

Implement Intranet

Redesign MOF WO Process   Implement

Implement ongoing Purchasing process improvement

NET H/C SAVINGS

• 2 FTE from Fiscal
• 2 FTE from MOF
• Ed Services (TBD - Part 2)

• 1-2 FTE HR or Fiscal

NET $ SAVINGS

$353,420 from FTE reduction

• $54,900 - 109,800/yr net dollars to district

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Questions?

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