

## Human Resources and Management Structure

### SUBJECT

Structure: The District should review accountability and reporting functions for most efficient staff utilization. Responsibilities, especially for newly created or restructured positions and departments, should be clearly articulated to the entire staff.

Ref#	Type	Recommendation	Discussion	Fiscal Comments	Status
37 IV-1.1	<input type="checkbox"/> Alt Rec <input checked="" type="checkbox"/> KPMG Rec	Eliminate the Assistant to the Superintendent position, not the person.	<ul style="list-style-type: none"> <li>o Eliminates a costly senior level position</li> <li>o Provides opportunity to review current organizational structure to assess options for change, increased efficiencies and savings</li> <li>o Provides opportunity to clarify roles and responsibilities</li> <li>o Loss of senior administrator with significant institutional memory</li> <li>o Potential for confusion by external stakeholders who have relied on this position for information and cooperation</li> </ul>	<p>Uncertain pending outcome of organizational review</p> <p>Potential savings of \$40K to \$60K possible.</p>	<p>In Process</p> <p>Superintendent's reorganization results in grants management becoming a segregated revenue center. Effective 7/1/99.</p>
38 IV-1.2	<input type="checkbox"/> Alt Rec <input checked="" type="checkbox"/> KPMG Rec	Distinguish the roles and responsibilities of the Academic Assistant Superintendents.	One of the Assistant Superintendents, Carol Matarazzo, is on the Taskforce and supports the finding and recommendation.		Done. Superintendent's reorganization has 2 assistant superintendents: 1 for Elementary, 1 for Secondary
40 IV-1.4	<input type="checkbox"/> Alt Rec <input checked="" type="checkbox"/> KPMG Rec	Organize functions under a new divisional configuration by adding a Human Resources Assistant Superintendent to the organization.	<ul style="list-style-type: none"> <li>o Elevates importance of HR which is appropriate for size of PPS organization</li> <li>o Streamlines operations</li> <li>o Improves support to Schools, Board and Team</li> </ul>		<p>In Process</p> <p>Target date for hiring Executive Director of HR is April 15</p>
41 IV-2.1	<input type="checkbox"/> Alt Rec <input checked="" type="checkbox"/> KPMG Rec	Re-examine narrow reporting relationships for the opportunity to rethink ways of getting the work done, and to consolidate functions and programs.	<ul style="list-style-type: none"> <li>o Reduce costs</li> <li>o Streamline operations</li> <li>o Improve support to Schools, Board and Team</li> <li>o Provide framework for performance standards/results</li> <li>o Could eliminate critical function or staff shortsightedly</li> <li>o Could cost more if lead worker or new alignment doesn't work</li> </ul>	<p>Goal is a \$100k cost savings for 41, 42. Removing supervisory personnel may lead to "up-skilling" of remaining positions.</p> <p>Increasing skills of current or recruiting new staff will cost money initially but should result in containment of costs and more for the money over time.</p>	Further District Review Pending

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Ref#	Type	Recommendation	Discussion	Fiscal Comments	Status
42 IV-2.2	<input type="checkbox"/> Alt Rec <input checked="" type="checkbox"/> KPMG Rec	Implement procedures to regularly analyze span of control and narrow reporting relationships to leverage management resources.	See #41.	See #41.	Further District Review Pending
43 IV-2.3	<input type="checkbox"/> Alt Rec <input checked="" type="checkbox"/> KPMG Rec	Continue to explore the number of and use of lead worker positions to ensure the appropriate management span of control over the Physical Plant operations.	There is benefit to continuing to explore the number of and use of lead worker positions to ensure appropriate management span of control over the Physical Plant operations.  Someone needs to assign daily work tasks, monitor them, order supplies and check the completed work product. Using leads instead of supervisors is in itself a cost-saving measure.		In Process
73 VI-4.2	<input type="checkbox"/> Alt Rec <input checked="" type="checkbox"/> KPMG Rec	PPS should consider linking financial accountability to performance evaluations for administrators and central service operations and provide for regular briefing to the Board on budget status.			Plan to Implement

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**SUBJECT** Staffing: To best utilize staff resources, the District should provide growth opportunities, via profession development and mentorships, and develop systematic recruitment programs for key positions. Staff data management should be streamlined under a new computer system.

Ref#	Type	Recommendation	Discussion	Fiscal Comments	Status
84 VI-10.1	<input type="checkbox"/> Alt Rec <input checked="" type="checkbox"/> KPMG Rec	Implement employment disclosure requirements for substitute and part-time employees.	<p>This is a data gathering process aimed primarily at new employees, particularly new substitute teachers, and part-time employees that might have worked in other Districts. The Task Force suggest some format that allows the newly hired employees to self report only if they have worked in other public agencies. This should be combined with other payroll information gathered as a new employee is incorporated into the current system.</p> <p>There is not an effective process that accurately obtains this information and in some cases the employee views this as a negative because of the payroll deduction. In the long run, PPS usually does get the information but the process can cause the employee concern because of the one time lump sum deduction, the requirement of staff time, and it does present the school District with some limited liability if it is not determined in a timely manner.</p> <p>At this point, the new employee has the most accurate knowledge of time he/she has worked at any public agency covered under the PERS system in the last 12 months. With an explanation to the employee of the benefit of reporting this information and a process that captures the information in a timely and accurate manner, everyone should benefit. This responsibility of reporting is leveraged to the employee who has the most to gain by ensuring that all work time is accurately captured in order to gain the long term benefit of PERS. Someday, with automation this may be possible to track in other ways but that will take some time.</p>	<p>Clearly, there is at a minimum a one time set up cost. There will need to be created an acceptable, effective and efficient format to obtain the information from those affected. Payroll professionals should be involved in determining that process.</p> <p>Currently about 5% of a staff member's time is spent tracking the hours of new employees in other public agencies. If a new information system is put in place, it should reduce the hours needed to obtain the information and make the reporting process easier. It will also reduce the PPS liability for interest on employee deductions not withheld.</p>	Further District Review Pending

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Ref#	Type	Recommendation	Discussion	Fiscal Comments	Status
228 VIII-41.1	<input checked="" type="checkbox"/> Alt Rec <input type="checkbox"/> KPMG Rec	The District should explore ways to encourage minority teachers to work toward administrative positions, possibly targeting linguistically and culturally diverse teachers to mentor, giving them a chance to gain practical experience. It is important that the District creates opportunities for administrative development. This mentoring experience should be included in experienced principals' goals. The District should maintain the same standard of quality for all hires.	In the past the District had a program that encouraged and mentored employees interested in becoming administrators. That program is gone with budget cuts. The inclusion of minorities in key administrative and academic areas would enhance the education that Portland offers students.	Some cost involved for identification, recruitment and development program.	Plan to implement
229 VIII-42.1	<input type="checkbox"/> Alt Rec <input checked="" type="checkbox"/> KPMG Rec	Explore using teachers during summer session to support recruitment, selection, and staff planning processes.	While the staff seems to manage within these difficult constraints-there would be an advantage to hiring the best new teachers if the District could accelerate the budget process. Teachers forced to wait until late August will take other offers. Additionally, staff is working beyond reasonable capacities during these peak periods. The Task Force recommendations may not be easily implemented. Short-term solutions should be part of budget discussions.		Rejected
83 VI-9.1	<input type="checkbox"/> Alt Rec <input checked="" type="checkbox"/> KPMG Rec	Ensure proper hiring policies and procedures are followed. While this situation is indicative of a lack of effective standard policies and procedures over the Human Resource process, the ability to override the payroll system presents an indication of a lack of adequate controls over the system. In addition, by allowing new employees to work who are not formally set-up could result in unnecessary risk of liability to PPS.	Communication from the central office to the schools regarding the required forms, policies and procedures, and subsequent enforcement of adherence to them, is an integral part of implementing this recommendation. New computer systems are simply tools to help in executing certain tasks and procedures, and are not themselves a substitute for sound policies and practices		Plan to Implement

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Ref#	Type	Recommendation	Discussion	Fiscal Comments	Status
151 VII- 23.1	<input checked="" type="checkbox"/> Alt Rec  <input type="checkbox"/> KPMG Rec	The District needs to take steps to make forecasts for Spanish-speaking ESL/Bilingual staff positions early in the year and offer employment to those who are recruited in a more timely fashion. Any steps the District could take to negotiate contract language that could retain staff with those unique linguistic capabilities from layoff in staff reductions for any reason would be extremely helpful. Recommendation should not be taken as directive in collective bargaining.	Growth in Hispanic student is projected to continue. The District must take concrete steps to rectify the underlying problems that prevent anticipating needs and hiring adequate staff that will not lose their positions as the overall enrollment may decrease.  Contractually, there may be difficulties retaining last hired bilingual staff. Making alterations to existing or new contract language in this instance will be evaluated in the larger context of negotiations overall.		In Process
231 VIII- 44.1	<input type="checkbox"/> Alt Rec  <input checked="" type="checkbox"/> KPMG Rec	Explore methods to create structured selection processes that provide for objective and equitable assessment of applicant qualifications (Various aspects of the personnel practices (classified hiring, and classification and compensation planning) should be formalized and updated. The informal nature of the classified personnel hiring processes may lead to the perception of inequity).	At present there is a great deal of ambiguity around the hiring process. The Task Force found different perceptions held by various staff closely involved in the process of hiring classified. As an example, at present very little checking of references is done (with the exception of the fingerprint/background check required by state law). However, there was a perception at the administrator level that the qualification list they received included some check, when in fact, they did not. Some members of HR indicated reference checks had been done on all candidates, when in fact, they had not been done until long after the candidate had been hired. We also found that in some hiring processes, because the hiring was done without feedback to the applicants, there was confusion and an unfounded belief of favoritism. We believe because of the intense work load in HR and at the administrative level that many of these issues are not currently being addressed and lead to poor hiring decisions.	Costs for staff time and outside resources.	Plan to Implement

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Ref#	Type	Recommendation	Discussion	Fiscal Comments	Status
233 VIII- 45.1	<input type="checkbox"/> Alt Rec  <input checked="" type="checkbox"/> KPMG Rec	Explore the benefit of expanding training to include courses for aspiring principals.	The Task Force see great benefit to finding means to implement this recommendation, especially given the next PERS bubble looming that will encourage another round of significant retirements. PPS does not have representative numbers of Hispanic administrators, so this program, especially for interested minority aspiring administrators would encourage participation in a structured program that can help assure success once they become principals. As both a cost benefit and an ongoing partnership, the District should explore joint creation of the program to minimize startup and operating costs. One suggestion was made to our group to approach the principals' association to explore their collaboration.		Rejected

## Human Resources and Management Structure

**SUBJECT** **Comp/Benefit: In an ever-changing educational system and competitive labor market, the District should review current policies for their efficiency. Procedures, such as teacher evaluations, and benefits packages should regularly reviewed and new options explored.**

Ref#	Type	Recommendation	Discussion	Fiscal Comments	Status
85 VI-11.1	<input checked="" type="checkbox"/> Alt Rec <input type="checkbox"/> KPMG Rec	PPS should explore strategies to reduce its overall benefits burden through the introduction of cafeteria benefit plans or other flexible benefits approaches. Recommendation should not be taken as directive in collective bargaining.	<p>The introduction of a cafeteria plan may allow PPS to enhance the value of employee benefits to employees while simultaneously reducing its overall benefits burden. A feasibility study should allow the PPS staff to weigh the advantages and disadvantages of flexible benefits for PPS employees.</p> <p>Since benefits to be provided to employees are subject to collective bargaining, all bargained units need to address this issue. As stated previously, if the concept is adopted by some but not all bargained units, administration of multiple plans may be a cumbersome and added expense.</p>	<p>To move the recommendation forward, there will be expenses related to consulting services as well as PPS staff time required to conduct a feasibility study. If a cafeteria plan design approach is approved, legal expenses will be incurred to amend the Trust document and to review the summary plan descriptions and communication materials. Introducing a cafeteria plan will require extensive training for resources to support the initial Open Enrollment. Additionally, it is likely that all materials regarding health/welfare benefits would have to be redrafted, printed, and distributed to all employees.</p> <p>Once implemented, in order to effectively administer flexible benefits, the necessary information systems will need to be in place.</p>	Further District Review Pending
230 VIII-43.1	<input checked="" type="checkbox"/> Alt Rec <input type="checkbox"/> KPMG Rec	Examine methods to make the teacher evaluation process more meaningful and address key areas of teacher performance and accomplishment. Recommendation should not be taken as directive in collective bargaining.	<p>Clear expectations mutually established between principals and teachers through an effective evaluation process should make the process more meaningful and address key areas of teacher performance and accomplishment.</p> <p>The evaluation process will only be effective is it is consistently applied in a timely manner.</p>	<p>Any revisions to the current process will require a thorough communication to staff as well as training on the use of newly developed evaluation tools. The evaluation manual and forms will need to be developed and printed.</p> <p>Cost of reprinting evaluation manual and forms as necessary</p>	In Process
232 VIII-44.2	<input type="checkbox"/> Alt Rec <input checked="" type="checkbox"/> KPMG Rec	Update the classification and compensation schedule for those not included in a collective bargaining unit.			In Process

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