

Portland Public Schools

***Audit Implementation
Steering Committee***

Ronald Gould
Co-Chair

Bruce Samson
Co-Chair

AISC Members

Sam Adams
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Gary Blackmer
Gerald Brandon
Maria Elena Campisteguy
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Sharon Gray
Michael Hutchens
Kevin Jeans-Gail
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J. Byron Kellar
Diane Linn
Allan Luethe
Isaac Regenstreif
William Scott
Ed Sheets
Floyd Spears
Lianne Thompson
Karen Wich

May 18, 1999

Benjamin O. Canada, Ph.D.
Superintendent
Portland Public Schools
501 North Dixon Street
Portland, Oregon 97227

Dear Superintendent Canada:

As you are aware, the Portland Public School District is ready for a profound transformation. Faced with insufficient revenues year after year since 1991, the District protected its classrooms by spending reserves and cutting other costs. After eight years, with reserves exhausted and administrative functions seriously depleted, District officials turned to other local officials for help. The officials of the City of Portland, Multnomah County, and the State of Oregon insisted on an examination of the organization by independent audit professionals.

When the District hired KPMG Peat Marwick to look at every major aspect of school administration, the City of Portland contributed half the cost. We appreciate the fact that one of your first acts as Superintendent was to accept the audit report and to invite further public participation in the review. The District enlisted 27 experts, parents, community leaders, business professionals, teachers, and students to serve on the Audit Implementation Steering Committee (AISC). Another 125 volunteers, of a similar composition, were recruited to study the audit and District in more detail through a series of Task Forces. This report describes the results of all our efforts and the depth of our commitment as a community to join forces with the District to bring about the necessary changes to achieve the full potential of each and every student.

A Foundation for Change

We already see a different District emerging—one with new leadership, better organization, more focus on the mission of educating our students, and more accountability to the community. But it is clear to us that the District's commitment to students cannot be achieved without better management and public accountability through public investments in infrastructure and adequate ongoing operational resources.

The 330-page KPMG performance audit vividly describes the problems they found throughout the District. The audit lists 140 findings and 233 recommendations in 10 areas. After their own analysis, the Task Forces agreed with nearly every one of the 140 findings of KPMG. The findings described inadequacies, weaknesses, and problems in District activities. However, the Task Forces frequently disagreed with the specific recommendations proposed by KPMG. We believe the auditors had not reviewed some of the areas in sufficient detail to identify the best solutions for improvement. With additional study, the AISC also found that many of the KPMG estimates of cost savings and revenue enhancements were inaccurate.

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Sixty-five percent of KPMG's estimated \$16.7 million in maximum net savings was in the area of school closures. The Facilities Task Force concluded that savings of this magnitude were not feasible, or were simply incorrectly calculated. Independently, The Oregonian newspaper came to the same conclusion. KPMG based their school-closure estimates on 100% occupancy rate. But when asked by the Task Force KPMG stated, based on national averages, that the maximum desirable occupancy is considered 90%. Despite KPMG's unrealistic estimates, the Task Force acknowledged the issue of excess capacity and chose to go beyond the audit's recommendations. They suggested possibilities such as leasing and co-location to reduce costs and increase facility revenues. The alternative recommendations proposed by the Task Force and accepted by the AISC can bring facility costs closer in line with the statewide averages and may generate revenue.

KPMG auditors did not include the estimated \$30 million cost of a new enterprise computer system in their calculations of net savings, although KPMG recommended that the District purchase the system to address many of their other recommendations. After adjusting for these and other differences, the AISC concluded that KPMG's findings/recommendations required expenditures for the computer system and found selected cost savings to be unrealistic. After dividing the savings and costs between one-time and annual, which can present two completely different pictures, the KPMG estimate net savings of \$16.7 million was reduced to \$200,000 after factoring out the one-time sale of surplus properties which could approximate \$11.8 million.

The District, staff, and operational support personnel acknowledge that the problems indicated in the audit are valid and have committed to make improvements that best serve their first priority: students.

A Commitment to Accountability

Our report must not be a conclusion, but a beginning. A key finding of KPMG was the lack of a District strategic plan. The Board and the District are embarking on a multi-year strategic planning process under the guidance of a national consultant, funded by the Portland Public Schools Foundation. The process will involve District personnel, parents, community leaders, and organizations served by the District. This is a multi-year effort to ensure that the District successfully completes a long-term consensus-based strategic plan, with plans of action, to achieve the District's mission and objectives.

Members of the AISC respectfully request that the District keep us informed on the implementation of these recommendations and encourages the District to continue gauging its progress towards achieving the very best education system for our students.

Respectfully,

Members of the Portland Public Schools
Audit Implementation Steering Committee

Performance audit serves as catalyst for change

The Performance Audit, the work done by the AISC (Audit Implementation Steering Committee) and the Task Force members has already served as a foundation for change by the District. Under the

new leadership of Dr. Benjamin Canada, the AISC has witnessed a renewed focus on the District's mission to have every student achieve their full potential, and greater accountability of public investments.

“Both The Oregonian and the AISC did their own independent research and found that KPMG's projected cost savings were significantly overstated.”

Ron Gould
AISC Co-Chair and
Retired Partner, Deloitte &
Touche LLP

“It is very unusual for a school district to open themselves up to this kind of extensive performance audit. I'm proud to be part of this process.”

Phil Keisling
AISC member and
Secretary of State, State of
Oregon

KPMG audit created unrealistic expectations of cost savings

When KPMG Peat Marwick (KPMG) released the performance audit in September 1998, they issued a “15 Point Agenda For Change”. It called for closing the equivalent of 11 elementary schools, 1 middle school and 1 high school; relocating the staff from the Blanchard Education Service Center (BESC) in order to lease out the space at BESC; and reengineering warehouse and purchasing practices to reduce warehouse operations by at least 50%.

The KPMG report stated that if the District implemented these 15 points, they could realize \$45.6 million in cost savings, with an investment of \$28.9 million, for a net positive impact of \$16.7 million. Only those who read the footnote at the bottom of the page realized that these figures did not include a recommended \$30 million needed for Information Technology replacement.

The KPMG report contained 140 findings and 233 recommendations. The findings were areas that KPMG identified as needing change or problem statements.

The review of the KPMG report by

the Audit Implementation Steering Committee (AISC) and the nine Task Force groups found agreement on a majority of the findings or problem areas that were identified. However, after careful study and discussion the AISC disagreed with many specifics of the recommendations. The AISC took the following actions:

One hundred and two of KPMG's original recommendations were approved. Eighty-eight alternative recommendations were approved. Fourteen recommendations were left for the strategic planning effort. Twenty-nine recommendations were either dropped, considered redundant, or passed on to the District for consideration without comment from the AISC due to inadequate information to evaluate the merits of the recommendation. Through detailed research, the AISC also concluded that KPMG's projected cost savings, particularly with regards to school consolidation, were considerably overstated. The AISC states up front that a fiscal impact analysis was not conducted on all of the recommendations and that such an analysis should be done prior to implementation by the District.

The AISC schedule was arranged to address recommendations with the greatest potential fiscal impact first so that these decisions could be incorporated into the District's current budget process, the Superintendent's organizational changes, and the District's communi-

cation with the Legislature. As a result of the AISC's input, the District has already taken action or started implementation on many of the areas they perceive greatest immediate impact or benefit on the District.

"The Task Force estimated that implementation of a new computer system is anticipated to reduce the District's expenses by \$3.4 million per year due to increased efficiencies."

Chuck Beyer
Chair,
Information Technology
Task Force and Chief
Information Officer, NW
Natural

"The Task Force is recommending immediate organizational changes in structure, staffing functions, and compensation and benefits."

Judy Rice
Chair,
Human Resources and
Management Structure
Task Force and President,
Oregon Symphony
Foundation

The District has already implemented the recommendations where they perceive the greatest immediate benefit

A number of the Task Force's recommendations are being implemented.

Computer System Replacement

Forty-five recommendations either referred to the need for a new computer system or a new system is needed in order to implement the recommendation. The situation with the outdated and inadequate information system has resulted in many critical problems throughout the District:

- Past information and data has been filled with errors, consistently inefficient, and difficult to reconcile. In a few years none of it will be reconcilable. The District has not been able to effectively balance its checkbook.

- PricewaterhouseCoopers' recent financial statement audit showed 21 serious problems connected to bad financial information.

- The District is in constant danger of facing costly fines and penalties through IRS, EEOC, and PERS reporting violations.

- Teachers are wasting many hours each week on repeated data entry required for attendance and report cards under the current system.

- The District risks losing state dollars with questionable or inaccurate enrollment figures now produced by the information system.

- The District is dangerously close to not being able to produce payroll.

Information Technology

PPS Action: On March 8, 1999 the School Board approved a \$31.1 million budget to implement an updated Student Information System integrated with Human Resources, Payroll and Finance. Included in this budget is \$1.2 million for training.

Human Resources

PPS Action: Based on the input from the Human Resources Task Force, the Superintendent proceeded with a number of re-organizational changes including consolidating three assistant superintendent positions into two assistant superintendent positions, one for Elementary and one for Secondary Education. The position of Assistant to the

“It is critical that the District move quickly to implement a bond management system that provides better control and accountability.”

Jerry Milstead
Chair,
Bond Management Task
Force and President,
Milstead & Associates

“Many of the changes in policies and procedures pointed out by the Finance Task Force will result in immediate benefit to the District—we don't have to wait until the new computer system comes online to see better accountability.”

Rick Fletcher, CPA
Finance and Risk
Management Task Force
and Vice President/
Controller, Morley Capital
Management, Inc

“School consolidation should only be looked at after the multi-use of buildings and sound facility management has been fully explored.”

Diane Linn
Facilities Utilization Task
Force, AISC member and
Multnomah County
Commissioner, District 1

Superintendent was eliminated. The target date for hiring the new Executive Director for Human Resources was April 15, 1999. The Superintendent also reorganized the grant management section in order for it to become a segregated self-sustaining and/or revenue positive operations center.

Bond Management

PPS Action: Since the Bond Task Force reported their findings and recommendations, the District has incorporated a number of their suggestions. Stephen Poage has been hired by the District as Program Director for the Bond Program. Pam Brown has been named Director of Facilities and Asset Management, and a Bond Program plan is being developed. The Bond Program is included in the information technology upgrade.

Finance

PPS Action: The District has already started implementation of

most of the Finance recommendations, especially those dealing with day-to-day operations. In some cases the action is already completed, such as making sure that bank reconciliations are done on a timely basis and hiring a new Cash Manager to track investment earnings and bank fees.

Communication and Public Policy

PPS Action: The District has hired full time legal counsel and has centralized all legal services, including Risk Management legal activities, into the Legal Unit. The Special Education Department has also been reorganized and a 3/4 time Assistant to the Director has been hired.

Administration and School Police

PPS Action: The Portland Police Bureau and the District are actively exploring every opportunity to “leverage services” which would result in cost savings to the District of approximately \$140,000.

Remaining recommendations have potential for further cost savings or revenue generation

The District still faces a number of critical decisions that will have widespread impact on students, teachers, and the District's ability to further improve the delivery of education in our community.

Excess Capacity in Facilities

The KPMG report stated that there were potential savings that could be derived from more efficient utilization of the District's facilities including the use of school buildings. The

Facilities Task Force did an extensive review of KPMG findings and concurred that though significant savings can be achieved, it is not as extensive as stated in the KPMG's report. The Task Force approached this challenge from the perspective of answering the question “How can the District increase utilization of the District's facilities and increase revenue?” Their answer presents a three-prong approach:

“To get more parents involved in their children's education, we must build up the Public Information and Communications Department. Let's be realistic, one person is not enough to do what has to be done.”

Cheryl Perrin
Chair,
Communications Task
Force and
Consultant/Executive
Director, Campaign for
America

“It is imperative that the consequences of a lack of action to turn the tide from its present course be both understood and acted upon—not only by the stakeholders who have a vested interest in the flourishing of the Portland Public School District, but also on those who will be affected by the negative repercussions on society by further neglect.”

Floyd Spears
AISC member and Field
Supervisor, Arjae Sheet
Metal Company

(1) Encourage an increase of non-school use of buildings and a corresponding increase of revenues,

(2) Sell property not currently used or needed by the District, and

(3) Conduct a utilization study of schools and, based on this information, consider limited consolidation of school buildings with the least impact on students.

The District has been moving forward with a number of the recommendations, exploring multiple use of facilities options with Multnomah County, developing lease and rental policies, and hiring an outside firm to manage custodial staff.

Inventory and Warehouse

The District is maintaining more

inventory than it needs. The Inventory Task Force made a number of recommendations regarding reducing inventory, allocating all warehousing costs to the end user, shortening lead time in ordering and delivery, and changing purchasing policies.

Communication and Public Information

If the District is going to be able to achieve their goals it will only be in partnership with parents, teachers, administrators, and community members. To facilitate this will require a Public Information and Communication Department that is adequately staffed to accomplish both the internal and external communication needs of the District. To meet these needs, the Department must have a communications plan.

Recommendations dealing with continued quality improvement by Portland Public Schools

The remaining recommendations are important and essential to improving the quality and efficient delivery of an excellent education to every student within the Portland Public School District.

Achievement

It is important to note that the Achievement recommendations deal with the process of delivering the curriculum and not the substance of the curriculum itself. There are a number of important issues that need to be addressed surrounding the area of equity and access to learning opportunities for all students, and curriculum and staff development.

Key Points

The review of the performance audit took over seven months. During that time many healthy debates occurred at both the AISC level and in the Task Force meetings. Though consensus was not achieved on all issues, some of the major points that were discussed included:

- The top priority for the District must be student achievement.
- Integration of the strategic planning process with the AISC recommendations is critical to the success of the District.

“I would offer City audit resources to be part of a City/County audit team to review the progress on implementation of these recommendations in a year.”

Gary Blackmer
Bond Management Task
Force, AISC member and
Auditor, City of Portland

“The work of the Audit Implementation Steering Committee is a journey, not a destination. We reviewed a lot of information and made a lot of recommendations, but this work has only just begun. Portland’s citizens need to continue to monitor the progress of the District in implementing these recommendations and effectively improving District performance.”

Marianne Fitzgerald
Communications Task
Force, AISC member and
member of Parents for
Public Schools of Portland

- The District needs to focus on equity of the availability and delivery of quality education for all students.

- Greater emphasis and resources need to be placed on public involvement in our education system. The District’s goals for quality education can not be achieved without parent and community involvement.

- To carry out the District’s mission there must be an adequate investment in information technology and accounting systems to support the delivery of quality education to every child.

Priorities

Once all of the Task Force groups reported and the recommendations were compiled, the AISC members voted on issue areas that were remaining to be implemented. Though the voting process certainly was not scientific, it did point out some interesting themes:

- The issues and recommendations on Achievement Standards and Curriculum Management were identified as the top priority of many of the AISC members.

- Multi-use of buildings including the BESC also ranked highly.

- Maintaining and potentially increasing student enrollment was important.

Next Steps

It is important that this report be seen as one step in a process to continuously strive for improved student achievement and increased District efficiencies. The AISC recommends the following items be included as next steps:

- The District and Board must follow through with the development and implementation of a strategic plan.

- The District must quantify the fiscal impact of recommendations that have not yet been quantified.

- The District and Board must regularly review their progress on implementing these recommendations, and then share this progress with the community.

- The District should continue to maximize student enrollment.

- The AISC supports the City of Portland’s contribution to the District and appreciates that the City has tied this support to the District demonstrating progress on enhancing student achievement.

Task Force Rosters

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Acknowledgements

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Finally, our sincerest thanks to the Portland Public Schools Foundation for their support of the Performance Audit and their continued work and assistance on development of the District strategic plan.

For additional copies of this report, you may download the Executive Summary or Final Report from the Portland Public Schools Web site www.pps.k12.or.us. For a printed copy of either document, please contact the Portland Public Schools Public Information Office at (503) 916-3304.