East Baton Rouge Parish Schools

Comprehensive Review: Organizational Review & Detailed Process Review

May 2019
Restrictions

This report is based on information and documentation that was made available to LEAN Frog at the date of this report. LEAN Frog has not audited nor otherwise attempted to independently verify the information provided unless otherwise indicated. Should additional information be provided to LEAN Frog after the issuance of this report, LEAN Frog reserves the right (but will be under no obligation) to review this information and adjust its comments accordingly.

Pursuant to the terms of our engagement, it is understood and agreed that all decisions in connection with the implementation of advice and recommendations as provided by LEAN Frog during the course of this engagement shall be the responsibility of, and made by, the East Baton Rouge Parish School Board and Leadership. LEAN Frog has not and will not perform management functions or make management decisions for the East Baton Rouge Parish Schools.

Comments in this report are not intended, nor should they be interpreted, to be legal advice or opinion. LEAN Frog has no present or contemplated interest in the East Baton Rouge Parish Schools nor are we an insider or associate of the East Baton Rouge Parish Schools or its management team. Our fees for this engagement are not contingent upon our findings or any other event. Accordingly, we believe we are independent of the East Baton Parish Schools and are acting objectively.

It should be noted that, in August 2016, East Baton Rouge Parish, along with all surrounding parishes, experienced a “historical 100 year” flood. This act of God is reflected in the performance data during and after this event.
East Baton Rouge Parish School System (EBRPSS) is the second largest school public school system in the state of Louisiana, serving more than 41,000 students in pre-kindergarten through grade twelve and approximately 2,700 adult education students annually. The system is the fourth ranked largest employer within the local area, employing slightly over 6,000 staff members, over half of whom are classroom teachers.

EBRPSS maintains 88 facilities on 1,299 acres of land throughout the parish. Facilities range in age from one to 89 years old.

EBRPSS provides a full range of public education services at all grade levels, ranging from pre-kindergarten through grade twelve. Total enrollment includes students participating in regular and enriched academic education, alternative education, exceptional student services education for the handicapped to age 22, career and technical education, and six charter schools (four elementary, one middle, one high). Services provided to students include instructional staff, instructional materials, instructional facilities, administrative support, business services, food services, system operations, facility maintenance, student health services, and bus transportation.
LEAN Frog has conducted a Comprehensive Review for East Baton Rouge Parish Schools. This formal review process is based on Lean Six Sigma approaches to improving operational and organizational efficiency and effectiveness. The process involved a detailed analysis of job duties, organizational structure, performance data, interviews with administrators and staff, onsite observation of work processes, and workflow analysis.

The assessment consisted of two parts:

- **An Organizational Review** of all central office functions with the addition of high-level performance comparative analysis of the following non-instructional areas: Facilities and Maintenance; Utilities; Nutrition; and Transportation.
- **A Detailed Process Review** of the following focus departments: Human Resources; Technology; and Business Operations.

The intent of the assessment was to:

- Review and evaluate the school system’s organization and management structure
- Assess the broad use of resources to determine whether they were generally aligned with performance and the school system’s instructional strategies
- Identify operational issues within the three focus departments and determine whether there were opportunities for improvement
- Develop recommendations to help the school system optimize its central office structure and improve internal processing within focus departments to achieve greater operational efficiency and effectiveness

**WHAT IS LEAN SIX SIGMA?**

Lean Six Sigma combines two proven approaches to continuous improvement:

- **LEAN** is an approach to driving process improvement through the elimination of wasteful activity. It focuses on ensuring you are doing the right things - those items that delivery high value to all stakeholders.
- **SIX SIGMA** is the practical use of statistics to analyze and solve problems through the removal of harmful variation. It focuses on doing things the right way - consistently.
Commendations (1 of 3)

Overall

- EBRPSS has reduced the Student to Overall Staff Ratio while maintaining the Student to Classroom Teacher Ratio in alignment with Student Membership.
- The student performance summary score has increased over the last five years from 68.4 to 79.8.
- Business Operations and Human Resources ranked as "Change Ready" based on the Organizational Change Readiness Level.
- EBRPSS’s per pupil spending is better than regional peers by an average of $2,480.00.
- The majority of Curriculum & Instruction personnel are mid-career in relation to retirement, which lends stability to the primary focus of transitioning EBRPSS to a Tier I instructional district.
- Child Nutrition performance measures were meeting or almost meeting the average performance level of national peers, while serving approximately 52,000 meals per day.
- EBRPSS has taken immediate action to address priority opportunities found during the assessment:
  - Treasury Management
  - Staff Budgeting
  - FMLA Compliance

“The best preparation for good work tomorrow is to do good work today.”

- Elbert Hubbard
Executive Summary

Commendations (2 of 3)

Human Resources (HR)

• Current HR department staff consists of a good mix of educators and external professionals who are capable of HR administrator work.
• Department employees were open and willing to share information and showed a desire to make improvements.
• Generally, department employees are engaged in multiple processes in the employee life cycle. This allows for cross-functional work, a deeper understanding of all processes, and coverage for absent department employees.
• HR manages multiple value-add programs to address the teacher shortage through providing programs to non-standard career teacher tracks and building the pipeline for future and current needs in difficult-to-fill positions.
• The HR department holds an annual “boot camp” to review HR trends and provide opportunities for leadership development. A copy of last year’s agenda was requested but not provided.
• An employee assistance program (EAP) is integrated into employee discipline and performance management.
• HR manages a mentoring program for new teachers.

Technology

• EBRPSS implemented a 1:1 initiative using 35,000 Chromebooks.
• Bandwidth has been upgraded to 10GB connectivity at all campuses.
Executive Summary

Commendations (3 of 3)

Technology (continued)

• The server infrastructure has been standardized to include color-coded wiring and schematics.

• Security functions for EBRPSS have been assumed as camera systems have been upgraded throughout the school system.

• A Microsoft Office 365 based work system (including MS Planner, MS Teams, all MS Office Products, and email) has been implemented.

• Technical staff are competent in managing/servicing both Wide Area Networks (WANs) and Local Area Networks (LANs).

• The department uses MS Planner to manage technology products.

Business Operations

• Of the departments reviewed, Business Operations had the most formalized procedures. There was evidence that these procedures were being maintained and updated as appropriate.

• Overall the school system’s Principal to Debt Ratio (based on bonded debt) is low (11% SY2017-18) as compared to national peers (38.9%).

• The average RFP/Formal Bid processing time (45 days) is within range of the upper quartile of best performing national peers.

• Returned grant funds are at a minimum, significantly better than national peers both average and upper quartile.
Executive Summary:
Organizational Review Recommendations
As EBRPSS undertakes a significant change in leadership with the retirement of the current Superintendent, we recommend a phased approach. Phase I would begin with an initial review/clean-up of the current strategic plan and set the direction for the school system over the next 12 months, thus laying a foundation for new leadership. For Phase II, we recommend the development of a detailed strategic plan, which should include a means to obtain stakeholder feedback throughout the process, yet ensure completion within five to six months. The plan should also include detailed action plans tied to measurable stepped key performance indicators (KPIs)/goals. The school system should establish an annual review process of stepped goals in order to determine whether adjustments to action plans are needed to drive desired results. Leadership evaluations should tie directly to planned actions and results.

EBRPSS’s current strategic plan was released in August 2013. The plan does not tie detailed actions to measurable stepped key performance indicators, other than general statements regarding desired end results. There is no formal review cycle. A review of the school system’s performance does not reflect the intended results of the established strategic objectives.

- Improved goal attainment
- Allowance for resource alignment
- Enhanced collaboration across functions
- Meet AdvanceED certification requirements

**Phase I: Review/Clean-up of Current Strategic Plan**

- Walk through the current strategic plan with leadership team. Review completed initiatives and results. Define current initiatives. Will current initiatives generate results within the next 12 months?
- Upon review of current initiatives, determine the “go forward” action:
  - Start new initiatives.
  - Stop and pivot resources to other initiatives.
  - Continue existing initiatives as planned.
- Define performance goals for all continuing initiatives.
- Document initiatives and goals. Define a review period for leadership (at least once during the next 12 to 16 months).
Phase II: Develop Detailed Strategic Plan

• Develop a Stakeholder-Driven Strategic Plan that incorporates inputs from all school system stakeholders (e.g., staff, board, community, parents, students, etc.).
EBRPSS should consider a move from a traditional functional organizational model to a matrix model. In this model, reporting relationships are set up as a grid, or a matrix, rather than in a traditional hierarchy. Reporting relationships are vertical, but student outcome-based relationships are horizontal. For example, all Reading Specialists may report vertically to a Curriculum Coordinator; however, a specific Specialist may be assigned to support a specific Learning Community whose needs may vary from another Learning Community. This approach allows large school systems to strategically meet individual Learning Community needs (i.e., provide more school-level focus), while moving the system as a whole toward an overarching goal. Different pathways are allowable to meet the same overarching goal; yet, best practice approaches are able to be easily shared and applied as beneficial across the system. Care should be taken to design the organization structure to enhance both vertical and horizontal integration while decreasing the number of leaders. As current leadership is undergoing change, this recommendation should not be pursued until new leadership has been established.

In the short-term, there are some functional areas that should be consolidated to improve overall performance, collaboration, and lay the foundation for future improvements.

- Improved vertical and horizontal integration
- Enhanced strategic focus
- Reduced costs
Executive Summary: Organizational Review Recommendations

Optimize Organizational Structure (2 of 2)

HOW

Phase I: Optimize and Align Current Organizational Structure

• Transition primary software support personnel (i.e., Student Information System Team, Finance, Budgeting, and Human Resources) to work with the department they support.
• Move Procurement under Business Operations.
• In areas where Directors and Assistant Directors exist, consider consolidation of positions into a single leader role.

Phase II: Deploy Matrix Organizational Model Structure

• After updating the school system’s strategic plan, re-organize each functional area to align with strategic goals and define Learning Communities.
• Complete gap analysis of strategic goals to Learning Community needs.
• Identify personnel needs and placement based on gap analysis outcomes.
EBRPSS should design and implement a technology plan that meets both the needs of students and the business operations of the school system. The plan should incorporate learning targets and benchmarks in line with the school system’s overall strategic plan as needed to appropriately measure the expenditure to student outcome ratio transparently. The plan should also incorporate operational targets in line with operational performance requirements for non-instructional areas that support student learning to ensure sustainability, security, performance, and cost alignment with strategic initiatives. To be effective, the technology plan should be more output-based than tied to specific devices. A plan should be developed that specifies what students, staff, and administration must be able to do with technology rather than the technology itself. All types of technology must be included in the plan, not merely computers or network hardware. Outcomes and performance should determine the types and amount of technology needed.

While EBRPSS has developed a plan for the adoption and use of instructional technology as a whole, the system does not have a current technology plan or any other means of strategically aligning the use of technology both inside and outside the classroom. This has resulted in duplication of systems, ineffective applications, and a lack of cohesiveness of the school system’s technology needs with that of students.

- Elimination of unnecessary purchases that do not align with the overall strategy
- Allowance for resource alignment
- Enhanced collaboration across functions
- Ensured sustainability

Once the overall strategic plan has been completed/updated, begin development of technology plan. The plan should be co-owned by both the Technology and Instructional Technology teams but developed cross-functionally with representatives from both instructional and non-instructional departments.

As a team, answer the following questions:
- What technology applications are available to help students, staff, and administration work smarter, not harder?
- Where can you really make the most of technology (e.g., teacher/student productivity, management of instruction, curriculum applications, staff productivity, improved collaboration/communication, analytics and analysis, etc.)?

At a minimum, address the following critical attributes within the plan: On-site technical support; Adequate hardware and security; Appropriate types and amounts of software; Long-term and sustained system-wide staff development as appropriate.
EBRPSS should establish performance dashboard tracking operational performance measures for each non-instructional department. These measures should be designed to ensure that they not only measure the right thing, but also that they measure the right thing correctly. Performance targets/goals should be set for each measure and a systematic approach for review and improvement should be established.

Very little data is used in non-instructional areas to review and monitor performance. Non-instructional departments are not data-driven. In several cases, review of provided data reflects performance below national peers.

- Ensured acceptable performance across non-instructional areas
- Clarified performance expectations across non-instructional areas
- Provision of data to enable “management by fact”
- Consistency in execution
- Provision of a foundation for understanding improvement priorities, effects of process changes
- Allowance for proactive adjustments prior to the occurrence of significant issues

WHAT

- Source training on and facilitation of standardized, best-practice approaches to deploy and develop operational performance measures. Training should outline the following: shared understanding of the meaning of operational performance measurement; definition of approaches for deployment; methods for metrics analysis; difference between signals versus noise and when to take corrective action; ability to assess whether corrective actions were successful; and understanding of how changes to processes will impact the measurement system. Once this has been completed, the following items should be addressed.

- Determine the measurement(s) for each non-instructional area to ensure consistency with priorities and strategy.
- Establish a performance baseline, then set realistic targets/goals for each measurement.
- Develop an operational performance dashboard for each area to track performance. Ideally, this would be completed using existing technology and then automated as needed to reduce labor involved with tracking performance so that more resources can be placed on driving and improving performance. Store dashboards where they are readily accessible. There is potential for these dashboards to be stored and updated through MS SharePoint.
- Establish procedures to review performance, take corrective action, and update/extend measures as needed based on process/requirement changes.

HOW
EBRPSS should utilize Lean Six Sigma (LSS) methods/tools to systematically drive continuous improvement across both instructional and non-instructional areas. LSS is a combination of two improvement methods:

- **LEAN** is an approach to driving process improvement through the elimination of wasteful activity. It focuses on ensuring you are doing the right things—those items that deliver high value to all stakeholders.

- **SIX SIGMA** is the practical use of statistics to analyze and solve problems through the removal of harmful variation. It focuses on doing things the right way—consistently.

Together they provide a simple yet comprehensive framework and toolkit for solving problems, improving processes, and driving innovation.

**WHAT**

EBRPSS should utilize Lean Six Sigma (LSS) methods/tools to systematically drive continuous improvement across both instructional and non-instructional areas. LSS is a combination of two improvement methods:

- **LEAN** is an approach to driving process improvement through the elimination of wasteful activity. It focuses on ensuring you are doing the right things—those items that deliver high value to all stakeholders.

- **SIX SIGMA** is the practical use of statistics to analyze and solve problems through the removal of harmful variation. It focuses on doing things the right way—consistently.

**HOW**

- Source training on and facilitation of standardized LSS approaches to driving innovation and problem-solving. Leadership should receive a high-level overview of LSS approaches from an executive perspective that outlines program expectations and next steps. Leadership should appoint department level champions to receive LSS project management and execution training. As part of the training, an improvement project should be selected and the champion should work through this project while being coached by the outside trainer/facilitator. Hands-on experience is required to learn skills needed to effectively and efficiently solve problems or implement innovation. Most projects will require a team to assist the champion. As part of team participation, team members should receive overview training that outlines expectations and simple tools to be used for analysis and improvement implementation.

- Initial projects can be selected from the list of those identified during the Detailed Process Review portion of this assessment.
EBRPS should deploy standardized technology and procedures for sustainable digital document management across all central office departments. All paper files that do not require storage in paper form should be destroyed. Standardized procedures should be developed for all required paper records that can not be stored digitally.

FileNexus is currently utilized to index and electronically store data; however, several departments do not properly use the system and continue to store paper files and face physical storage issues. Other departments do not utilize the platform at all and continue to store paper files. Some departments have dedicated resources to manage paper file storage.

- Reduced/eliminated paper file storage
- Reduced labor hours required to manage paper files
- Reduced supply costs

WHAT
EBRPS should deploy standardized technology and procedures for sustainable digital document management across all central office departments. All paper files that do not require storage in paper form should be destroyed. Standardized procedures should be developed for all required paper records that can not be stored digitally.

HOW
- Review each central office department’s approach and methods for document/record storage and identify gaps where FileNexus is either not being used or is not properly being used.
- Identify root cause(s) of why FileNexus is not being utilized. Research legal document retention requirements. Determine if FileNexus meets all requirements of school system stakeholders or if an alternative solution should be pursued.
- If an alternative solution to FileNexus is needed, develop specifications and pursue acquisition of alternatives. (Note: alternatives could be both software/hardware-based or tied to overarching support services (i.e., Xerox).) At this point, the system may decide to expand the scope of document management solutions to encompass school-level processing.
- If FileNexus is the go-forward solution, or once a new solution is in place, develop new procedures to ensure the proper use of the system, along with procedures to govern any required paper filing.
- Develop an implementation plan to roll out electronic document management across central office departments. The plan should include training on new procedures as well as set-up of any required software/hardware.
At the present time, EBRPSS does not have funding to support the consolidation of central office locations; therefore, the system should employ new virtual work methods to reduce productivity loss and costs. The central offices should deploy virtual work guidelines to include defined communication methods/prioritization, virtual meeting approaches for groups, virtual face-to-face meeting techniques, online collaboration tools (i.e., live joint document editing), and tools for web-based internal training. Additionally, executive and department leadership should utilize a decision analysis matrix to determine the effectiveness of virtual work deployment and routinely analyze the outcomes of virtual work opportunities.

EBRPSS has central office staff in 26 different locations across the district. In some cases, department members are housed in multiple locations. This multiplicity leads to productivity loss and additional loss due to drive time for meetings, work sessions, and trainings. EBRPSS has invested in MS Office 365 software tools for most staff members. This software suite has several tools to assist with virtual teaming, collaboration, and training tools.

- Increased productivity
- Decreased travel time
- Reduced cost in labor and reimbursements

Note: If funding becomes available EBRPSS should conduct a feasibility study regarding the consolidation of the 26 Central Office Locations into a singular facility.
A Detailed Efficiency Review of Transportation and Facilities should be conducted. This review should go deeper than the high-level review of performance measures conducted so far and include analysis of work methods, internal systems and process, service level surveys, and onsite facility walkthroughs in order to determine what root causes are driving costs and impending quality of service. This review should provide detailed recommendations regarding actions to be taken to improve service levels and reduce costs.

### Phase I: Complete a Detailed Efficiency Review of Transportation

- The review should include at least the following items:
  - Shop Management Practices
  - Fuel Management Practices
  - Routing Efficiency Analysis
  - Fleet Management Practices

### Phase II: Complete a Detailed Efficiency Review of Facilities

- The review should include at least the following items:
  - Corrective Maintenance Process
  - Preventative Maintenance Process
  - Major Maintenance/Renovation Process
  - Custodial Supply and Equipment Management Practices
  - Custodial Service Practices
  - Customer Service Feedback from school staff members
  - A sample set of On-site facilities walk-throughs
Further analysis should be completed to determine the feasibility of deploying a behavioral-based energy savings program. Initially the school system should identify anomalies by campus and address these. Once a performance-baseline has been established a behavior driven energy management program should be put into place.

**Phase I: Address Utility Anomalies and Develop Baseline**

- Historical performance analysis should be conducted for the last two years. Initial data should be reviewed to see if there are usage anomalies that appear with normalized data comparisons across all facilities (e.g., spiked usage or consistently higher usage in a single facility compared to other facilities). All anomalies should be reviewed by a site visit and principal interviews to determine root cause and potential solutions. If possible, these should be corrected.

- Once these items are corrected, further variance should be mainly behavior-driven. Use data to establish a performance baseline for each school/facility. Considering facility condition, energy upgrades, and behavioral variance, develop an individualized goals for each facility.

**Phase 2: Deploy a Behavioral-Based Energy Savings Program**

- Develop and implement an employee energy savings awareness program centered on establishing cost efficient energy management behaviors. Establish a principal/school incentive program to reward school-level energy management. Define physical environment improvements to drive energy savings. Use a portion of behavior savings to fund implementation of physical environment improvements.
Executive Summary:
Procedures for I-9 document retention must be updated to eliminate potential liability for retaining documents with errors that could result in fines. This would involve not only removing I-9s from personnel records and placing them in a separate filing system, but also creating a new process of record retention to include a purging system that ensures regular removal of I-9s that do not need to be retained based on the legal requirements. The identified missing FMLA notification has been accurately updated per requirements since the interview. Due to the identification of two compliance opportunities, a detailed Human Resources Compliance audit should be conducted to review for compliance in record retention and other federal and state Human Resources law requirements. Although HR participates in the annual financial audit, HR law compliance opportunities are not the focus of such an audit.

**Phase I: Address Human Resources Immediate Compliance Opportunities**
- Develop new I-9 document retention procedures following best practices.
- Document new procedures to ensure sustainability of updated procedures.

**Phase II: Conduct Detailed Human Resources Compliance Audit**
- Utilize a third party to conduct a close review of files and records to ensure all compliance requirements are met.

**Phase III: Address Human Resources Compliance Audit Opportunities**
- Update procedures to include any compliance updates as revealed in the audit.
There are multiple factors contributing to low substitute fill rates, including but not limited to employee attendance issues and the current conservative approach to managing ACA requirements. Substitute fill rates can be improved by defining and addressing root cause issues affecting current substitute management processes by using a solution-driven problem-solving Six Sigma method known as DMAIC*.

**WHAT**

There are multiple factors contributing to low substitute fill rates, including but not limited to employee attendance issues and the current conservative approach to managing ACA requirements. Substitute fill rates can be improved by defining and addressing root cause issues affecting current substitute management processes by using a solution-driven problem-solving Six Sigma method known as DMAIC*.

**HOW**

- Define problems associated with the substitute fill rates by identifying all current processes, policies, and practices.
- Measure the impacts of each problem.
- Analyze the data and impacts to determine priority of changes needed.
- Improve the processes, policies, and practices that will increase substitute fill rates.
- Control the changes by documenting and standardizing the improvements and defining key measurements to monitor substitute fill rates and address potential future issues.

**WHY**

According to the data provided, substitute fill rates are low. Based on the process described, the focus is on hiring substitutes on a regular schedule and the number of substitutes on record. EBRPSS should be able to fulfill substitute needs if absenteeism is similar to peer systems. However, there is no focus at the central level on ensuring these substitutes are available and working as needed. Substitutes are not required to work a minimum amount of days annually to continue to stay on the active substitute list and no incentives are provided for working at hard-to-staff schools.

- Improved substitute fill rates
- Sustained improvements

*DMAIC is a Lean Six Sigma problem-solving tool that is most useful in determining solutions to issues caused by complex, multiple root causes.*
Executive Summary: Detailed Process Review Recommendations

Automate Manual Human Resources Processes

**WHY**
The predominant method of employee life cycle processing is paper-based and highly transactional, which leads to additional labor. Current systems are neither fully utilized nor integrated, resulting in duplication of work.

- Increased speed in processing
- Reduction in labor hours for redundant data entry
- Reduction in paper/asset waste and paper management

**WHAT**
Employee life cycle processes should be automated utilizing technology solutions that provide electronic workflow, data integration, data reporting, and visibility of work status.

**HOW**

**Phase I: Develop Future State of Human Resources Process and Technology**
- Map current hiring, job change, separation, and other employee processes using Value Stream Mapping (VSM)* to engage the team and identify waste and opportunities within each process.
- Map an ideal state map for each process in which waste is eliminated and opportunities are addressed.
- Develop specification requirements for needed technology.

**Phase II: Conduct Review of Human Resources System Vendors**
- Engage each current vendor to determine provided and modular functional services that meet the needs of ideal state maps.
- If needed due to lack of current functionality, conduct a vendor search (via RFP if needed) using the ideal state maps as the scope of services needed.

**Phase III: Implement Human Resources Process Improvement/System**
- Utilizing a project management plan, name a project manager and implementation team and engage stakeholders in implementation, testing, and communication.

*VSM is a Lean tool used to illustrate, analyze, and improve a process’s efficiency and effectiveness.
The current timekeeping and payroll processing is paper-based, labor intensive, prone to errors and allows for legal liabilities under the Fair Labor Standards Act regarding the tracking of time worked for non-exempt personnel and other related considerations. As a result of process inefficiencies, overall performance is lacking as compared to national peers.

**WHAT**

The timekeeping and payroll processing should be improved to reduce manual management and improve tracking of overtime, compensatory time, and leave. Also, automation may be considered to remove manual and paper waste.

**HOW**

**Phase I: Develop Future State Plan For Timekeeping and Payroll Processing / Address Immediate Compliance Risks**

- Map and analyze current payroll processing procedures at the school/department level and the central office level and identify process waste and compliance risk using Value Stream Mapping (VSM)*.
- Map an ideal state map for each process in which waste is eliminated and errors are minimized.
- Update and document timekeeping policies which includes Fair Labor Standards Act compliance.

**Phase II: Conduct Review of Timekeeping System Vendors**

- Develop specification requirements for needed technology.

**Phase III: Implement Timekeeping System**

- Map a future implementable map using needed technology.
- Identify and charge an Implementation team.

*VSM is a Lean tool used to illustrate, analyze, and improve a process’s efficiency and effectiveness.*
The Technology department should optimize the Technology Work Order process through:

- Full optimization of the current work order system (SchoolDude).
- Exploration of the use of a “Student Help Desk” program to reduce overall cost, increase work ticket close rates, and enhance the learning of students.
- Improvement of workflow and Network Specialist assignments and optimization of workstations within the repair center and offices to be more efficient.

The current Technology Work Request process ineffectively utilizes existing software. This results in an increased number of work order tickets and a lack of clarity in work order tickets and requires daily manual intervention. The break/fix cost per ticket, as well as average time to complete each ticket, is significantly higher than national peers. Additionally, the overall work request process contains workflow deficiencies, reducing staff utilization.

- Decreased cost per ticket
- Optimized staffing levels
- Faster repair turnaround time

WHAT

The Technology department should optimize the Technology Work Order process through:

- Full optimization of the current work order system (SchoolDude).
- Exploration of the use of a “Student Help Desk” program to reduce overall cost, increase work ticket close rates, and enhance the learning of students.
- Improvement of workflow and Network Specialist assignments and optimization of workstations within the repair center and offices to be more efficient.

HOW

Phase I: Optimize SchoolDude

- Reconfigure SchoolDude’s 31 problem types to accurately reflect break/fix ticket categories.
- Utilize the auto-routing features of SchoolDude to deploy tickets to identified areas and personnel most apt to complete ticketed requests.

Phase II: Explore Establishing a “Student Help Desk” Program

- Investigate other successful “Student Help Desk” programs and design a program that is the best fit for EBRPSS.
- Identify ways for students to join the program and earn credentials and/or certificates.

Phase III: Optimize Workflow and Work Areas

- Develop a patterned approach to utilizing the Network Specialist across the district schools and locations to reduce windshield time, increase routine maintenance, and improve customer service satisfaction.
- Deploy the LEAN workplace organization tool 5S to optimize the repair center and workstations of department members and Network Specialists.
A Software Utilization Assessment should be conducted for the purpose of evaluating each piece of software currently utilized by the district. A determination should be made as to whether the software should be continued, optimized, further integrated, or eliminated through use, benefit, and cost analysis.

What

- Perform a historical analysis of all purchased software to evaluate overall cost of initial purchase, training, and recurring fees.
- Analyze each software for cross functionality and integrations between departments.
- Utilize a Decision Analysis and Resolution Matrix to categorically assess each software by cost, use case, utilization, benefit, and redundancy.
- Deploy plan to optimize and reduce software platforms based on current contracts and relevant replacements or contingencies.
- Integrate assessment outcomes into the most current system-wide technology plan.

Why

EBRPSS utilizes multiple software programs to complete business and instructional functions. Several of these programs are not fully utilized and create redundancy as well as increases costs. Much of the software has been purchased using a siloed approach within departments, which limits integrations and cross-functionality.

- Reduced software costs
- Increased integration across departments

How
Accounts Payable (AP) invoice processing is manual and paper-based and lacks optimization. As a result of these process inefficiencies, overall performance is lacking as compared to national peers. AP is processing invoices within 5.5 days once received from Procurement. An actual measure of invoices from Procurement through AP appears to 10 - 30 days.

**WHAT**

Accounts Payable processing should be reviewed to identify opportunities to reduce manual activity and optimize process efficiency. The use of automation with existing systems should be considered to remove manual and paper waste.

**HOW**

- Utilize Value Stream Mapping (VSM)* to map the current state process, identify waste, and engage employees in the improvement process.
- Identify available integration opportunities with existing software.
- Develop new process and document with procedures and work instructions.
- Develop and execute implementation plan.

**NOTE:** This recommendation may be implemented in conjunction with the following recommendation for Procurement process improvement.

Also, portions of this recommendation may tie to the prior recommendation to Standardize Method for Storing Document Records (see page 17).

*VSM is a Lean tool used to illustrate, analyze, and improve a process's efficiency and effectiveness.*
Executive Summary: Detailed Process Review Recommendations

Automate Procurement Processing

**WHY**

Procurement processing is semi-automated (purchase order approval process only), with portions being manual, paper-based, and not optimized. The Procurement department does not utilize any document or print management system, although other departments are utilizing FileNexus. EBRPSS does not maintain individual P-Card usage for Maintenance or Technology staff.

- Reduced Procurement costs
- Improved days to process

**WHAT**

The full procurement process should be reviewed for optimization and automation - from the beginning of the process at request, through notification, to ending at final matching of the receipt to the invoice. An exploration of existing software system or low cost workflow automation tools should be conducted. Other procurement approaches may also be considered, such as purchasing cards.

**HOW**

- Utilize Value Stream Mapping (VSM)* to map the current state process, identify waste, and engage employees in the improvement process.
- Identify available integration opportunities with existing software.
- Develop new process and document with procedures and work instructions.
- Develop and execute implementation plan.

**NOTE:** This recommendation may be implemented in conjunction with the previous recommendation for Accounts Payable process improvement.

*VSM is a Lean tool used to illustrate, analyze, and improve a process’s efficiency and effectiveness.*
Develop Process to Pursue Competitive Grants

**WHY**
Performance review shows that EBRPSS efficiently manages grant funds with little funding ever being returned; yet, the school system has both significantly fewer grants as a percentage of the total budget and fewer of those grants being competitive awarded. National peer districts range in having as much as 13.5 percent of their total budget being grant-funded with as much as 19 percent being competitive awarded.

**WHAT**
EBRPSS should pursue more strategically-aligned competitive grants.

**HOW**
- Upon updating the overall strategic plan, develop and deploy a robust process to pursue competitive grants.
- Confirm that grants are tied to the overall school system strategy and that the new process includes a review to ensure that grants do not create future encumbrances once grant funding has expired.
Executive Summary: Improvement Road Map
<table>
<thead>
<tr>
<th>Recommendations</th>
<th>Proposed Improvement Projects</th>
<th>Time for Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define Strategic Direction for the School System</td>
<td>Phase 1 - Review and clean-up of current Strategic Plan</td>
<td>1-3 mos</td>
</tr>
<tr>
<td></td>
<td>Phase 2 - Develop a detailed Strategic Plan</td>
<td>5-6 mos</td>
</tr>
<tr>
<td>Optimize Organizational Structure</td>
<td>Phase 1 - Optimize and align current organizational structure</td>
<td>5-6 mos</td>
</tr>
<tr>
<td></td>
<td>Phase 2 - Deploy Matrix organizational modeled structure</td>
<td>6-12 mos</td>
</tr>
<tr>
<td>Develop Strategically Aligned Technology Plan</td>
<td>Design and implement a technology plan that meets both the needs of students and the business operations of the school system</td>
<td>3-4 mos</td>
</tr>
<tr>
<td>Deploy Operational Performance Measures</td>
<td>Establish a performance dashboard tracking operational measure for each non-instructional department</td>
<td>3-6 mos</td>
</tr>
<tr>
<td>Establish a Continuous Improvement Program</td>
<td>Implement the standardize use Lean Six Sigma methods/tools to drive innovation and problem-solving</td>
<td>9-16 mos</td>
</tr>
<tr>
<td>Standardize Method for Storing Document Records</td>
<td>Deploy standardized procedures and technology for storing electronic and physical documents</td>
<td>9-14 mos</td>
</tr>
<tr>
<td>Deploy Virtual Work Guidelines</td>
<td>Develop guidelines to encourage proper use of already acquired software tools to improve productivity</td>
<td>2-3 mos</td>
</tr>
<tr>
<td>Take a Deeper Review of Transportation and Facilities</td>
<td>Phase 1 - Complete Detailed Efficency Review of Transportation</td>
<td>3 - 4 mos</td>
</tr>
<tr>
<td></td>
<td>Phase 2 - Complete Detailed Efficiency Review of Facilities</td>
<td>3 - 4 mos</td>
</tr>
<tr>
<td>Explore Developing a Behavioral-Based Energy Savings Program</td>
<td>Phase 1: Address Utility Anomalies and Develop Baseline</td>
<td>3 - 6 mos</td>
</tr>
<tr>
<td></td>
<td>Phase 2: Deploy a Behavioral-Based Energy Savings Program</td>
<td>4 - 8 mos</td>
</tr>
</tbody>
</table>
# Executive Summary

## Recommended Improvement Projects (2 of 2)

<table>
<thead>
<tr>
<th>Recommendations</th>
<th>Proposed Improvement Projects</th>
<th>Time for Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address HR Compliance Opportunities</td>
<td>Phase 1- Address immediate HR compliance opportunities</td>
<td>1-3 mos</td>
</tr>
<tr>
<td></td>
<td>Phase 2- Conduct detailed HR Audit</td>
<td>1-3 mos</td>
</tr>
<tr>
<td></td>
<td>Phase 3- Address HR Compliance Audit opportunities</td>
<td>3-6 mos</td>
</tr>
<tr>
<td>Address Low Substitute Fill Rates</td>
<td>Utilize a DMAIC problem solving approach to identify and address multiple root causes contributing to low substitute fill rates</td>
<td>6-9 mos</td>
</tr>
<tr>
<td>Automate manual HR processes</td>
<td>Phase 1- Develop Future State of HR Process and Technology</td>
<td>3-6 mos</td>
</tr>
<tr>
<td></td>
<td>Phase 2- HR System Vendor Review</td>
<td>3-6 mos</td>
</tr>
<tr>
<td></td>
<td>Phase 3- HR Process Improvement/System implementation</td>
<td>6-12 mos</td>
</tr>
<tr>
<td>Improve Timekeeping and Payroll Processing</td>
<td>Phase 1- Develop future state plan for TimeKeeping &amp; Payroll Processing/Address immediate compliance issues</td>
<td>3-6 mos</td>
</tr>
<tr>
<td></td>
<td>Phase 2- Timekeeping System Vendor Review</td>
<td>3-6 mos</td>
</tr>
<tr>
<td></td>
<td>Phase 3- Timekeeping System implementation</td>
<td>6-12 mos</td>
</tr>
<tr>
<td>Optimize the Technology Work Request Process</td>
<td>Phase 1 - Optimize SchoolDude</td>
<td>2-3 mos</td>
</tr>
<tr>
<td></td>
<td>Phase 2 - Explore Establishing a &quot;Student Help Desk&quot; Program</td>
<td>6-12 mos</td>
</tr>
<tr>
<td></td>
<td>Phase 3 - Optimize Work Request Workflow and Work Areas</td>
<td>6-12 mos</td>
</tr>
<tr>
<td>Conduct a Software Utilization Assessment</td>
<td>Evaluate current software usage, integration, and benefit to determine opportunities for improvement</td>
<td>3-4 mos</td>
</tr>
<tr>
<td>Optimize Accounts Payable Invoice Processing</td>
<td>Utilize a Value Stream Mapping (VSM) approach to improve efficiency of Invoice Processing</td>
<td>3-6 mos</td>
</tr>
<tr>
<td>Automate Procurement Processing</td>
<td>Utilize a Value Stream Mapping (VSM) approach to improve efficiency of Procurement Processing prior to electronic requisition and after Purchase Order Issuance</td>
<td>3-6 mos</td>
</tr>
<tr>
<td>Develop Process to Pursue Competitive Grants</td>
<td>EBRPSS should put in place a robust process to pursue competitive grants.</td>
<td>3-4 mos</td>
</tr>
</tbody>
</table>
### Executive Summary

#### Recommended Improvement Project Timing (1 of 2)

| Priority | Improvement Projects
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Projects to begin Implementation on</strong></td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>Phase 1 - Address immediate HR compliance opportunities</td>
</tr>
<tr>
<td>A</td>
<td>Address Low Substitute Fill Rates</td>
</tr>
<tr>
<td>A</td>
<td>Phase 1 - Optimize SchoolDude</td>
</tr>
<tr>
<td>A</td>
<td>Phase 1 - Complete Detailed Efficency Review of Transportation</td>
</tr>
<tr>
<td>A</td>
<td>Automate Procurement Processing/Optimize Accounts Payable Invoice Processing</td>
</tr>
</tbody>
</table>

| Priority | Short Term Improvement Projects
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Projects to begin after Budget Approval (Implemented over 12-16 months)</strong></td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>Phase 1 - Review and clean-up of current Strategic Plan</td>
</tr>
<tr>
<td>A</td>
<td>Conduct a Software Utilization Assessment</td>
</tr>
<tr>
<td>A</td>
<td>Phase 2 - Explore Establishing a &quot;Student Help Desk&quot; Program</td>
</tr>
<tr>
<td>A</td>
<td>Deploy Virtual Work Guidelines</td>
</tr>
<tr>
<td>B</td>
<td>Phase 1 - Optimize and align current organizational structure</td>
</tr>
<tr>
<td>B</td>
<td>Phase 3 - Optimize Work Request Workflow and Work Areas</td>
</tr>
<tr>
<td>C</td>
<td>Phase 1- Develop future state plan for TimeKeeping &amp; Payroll Processing/Address immediate compliance issues</td>
</tr>
<tr>
<td>C</td>
<td>Phase 1-Develop Future State of HR Process and Technology</td>
</tr>
</tbody>
</table>
## Executive Summary

### Recommended Improvement Project Timing (2 of 2)

<table>
<thead>
<tr>
<th>Priority</th>
<th>Long Term Improvement Projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Phase 2 - Develop a detailed Strategic Plan</td>
</tr>
<tr>
<td>A</td>
<td>Develop Strategically Aligned Technology Plan</td>
</tr>
<tr>
<td>A</td>
<td>Phase 2 - Deploy Matrix organizational modeled structure</td>
</tr>
<tr>
<td>B</td>
<td>Deploy Operational Performance Measures</td>
</tr>
<tr>
<td>C</td>
<td>Develop Process to Pursue Competitive Grants</td>
</tr>
<tr>
<td>C</td>
<td>Phase 2 - Complete Detailed Efficiency Review of Facilities</td>
</tr>
<tr>
<td>D</td>
<td>Phase 2- Timekeeping System Vendor Review</td>
</tr>
<tr>
<td>D</td>
<td>Phase 2- HR System Vendor Review</td>
</tr>
<tr>
<td>D</td>
<td>Standardize Method for Storing Document Records</td>
</tr>
<tr>
<td>D</td>
<td>Establish a Continuous Improvement Program</td>
</tr>
<tr>
<td>E</td>
<td>Phase 3- Timekeeping System implementation</td>
</tr>
<tr>
<td>E</td>
<td>Phase 3- HR Process Improvement/System implementation</td>
</tr>
</tbody>
</table>