

**EVALUATION OF ASSIGNED RESPONSIBILITIES FOR
ADMINISTRATIVE SUPPORT POSITIONS for
School District of Milton
June 7, 2013**

CONFIDENTIAL

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Introduction

The School District of Milton retained Confidential. to conduct a comprehensive study of its assignment of responsibilities for Administrative Support Positions.

As with most Wisconsin school districts in recent years, the School District of Milton is evaluating its staff requirements relative to its mission, desired service levels and budgetary resources. The District will have a new superintendent starting effective July 1, 2013.

Prior to the new superintendent's arrival, Ms. Rusch seeks an evaluation of District Central Office support staff responsibilities. A reduction of 1.5 (FTE) positions has resulted in a redistribution of those responsibilities among remaining staff. The review objectives are to help determine optimum allocation of responsibilities among current positions, to ensure workload is equitably allocated among incumbents, to implement a system to monitor recommended changes, to obtain staff ratios for comparably-sized school districts, to determine comparative compensation data (market-pricing) and to develop pay recommendations for selected positions.

The reduction of 1.5 FTE occurred as a result of one person obtaining a full time position within the District and a second person leaving the District for another opportunity. The Interim Superintendent, realizing the reduction of State aids, used the situation to identify the potential economies that might be possible.

The study results are desired to be available by June 7, 2013.

Executive Summary

This Evaluation of Assigned Responsibilities for Administrative Support Positions considered three major items:

1. Evaluation of reduction of 1.5 FTE in support staff
2. Evaluation of compensation for resulting positions
3. Comparison of School District of Milton support staffing to peer districts

Item 1 had the challenge of essentially determining if each remaining staff could accommodate 430 hours of annual work or if tasks could be eliminated.

Item 2 addresses the question of compensation equity both internally and externally.

Item 3 addresses the question of whether the School District of Milton is providing a comparable level of support for schools and teachers relative to peer districts.

In essence, this project has considered the issue from three different points of view. The findings may be summarized as:

- Some tasks previously performed may be discontinued.

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- Existing staff has some capacity to accommodate the additional tasks, but not all.
- A new compensation plan has been prepared.
- School District of Milton is clearly not providing “excessive” support when compared to peers.

Obtaining these objectives encompasses a significant amount of data and concepts. Two supporting reports provide the analysis and findings for the Evaluation of Compensation (Market Pricing) and Comparison to Peer Districts. The reader is encouraged to read all three reports in order to gain an understanding of issues and recommendations.

Scope of Study

The project scope requested by the School District of Milton is:

1. Confirmed Project Scope and Deliverables with Client: included meeting with Client (via teleconference) to clarify objectives, scope and desired study outcomes to ensure it met their objectives, budgetary requirements and timeframe.
2. Developed Project Plan/Process: included, among other elements, the following:
 - Obtained Client Input – receiving feedback from the Client on the suggested process and approach described herein and making necessary revisions;
 - Obtained Relevant Documentation from Client – receiving any documentation the Client believes is relevant for this study, including, but not limited to:
 - prior studies performed by the District or third-party consultants
 - job descriptions or comparable summaries of incumbent responsibilities
 - description of anecdotal information considered helpful, such as turnover statistics in these positions, etc.
 - Developed Internal Memo –a memorandum communicated the study purpose and timeframe to incumbents who were requested to participate;
 - Developed Interview Questionnaires - developed interview questionnaire(s) for individual discussions with incumbents to obtain their feedback, documentation and other “evidence” related to tasks;
 - Scheduled Meetings with Incumbents – worked with the Client, developed a project schedule that accommodated participants’ schedules and desired for study completion timeframe;
 - Obtained Incumbent Data – received designated incumbents’ data (e.g. feedback, documentation and other “evidence”) related to their tasks through individual discussions, including representative sample documentation (e.g.

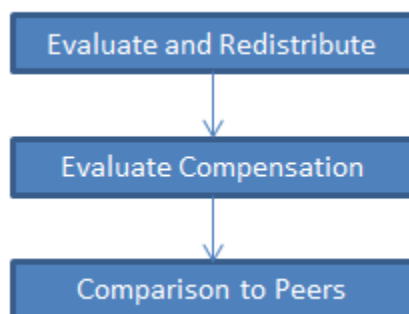
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project files, forms, logs, reports, minutes, schedules, newsletters, lists, etc.) related to their respective position and workload.

- Updating / Developing Position Descriptions (OPTIONAL) – requested each incumbent to provide information about their position’s roles, responsibilities, qualifications and required mental and physical requirements through completion of Confidential’s Position Description Questionnaire (PDQ).
- Obtained Supervisory Input – obtained input from incumbents’ supervisors to clarify and validate or revise incumbent feedback and documentation related to incumbents’ responsibilities and workload.
- Reviewed and Analyzed Data – organized, reviewed and analyzed incumbent and supervisory feedback and data to enable conclusions to be drawn and recommendations made.

Project Overview

The project consists of three sub-studies:



1. “Evaluate and Redistribute” addresses the issue of tasks previously performed by 1.5 FTE’s that are not presently staffed and redistribution of tasks among remaining office staff.
2. “Evaluate Compensation” addresses the issue of external equity of compensation for the remaining office staff positions after the tasks were redistributed. After comparison to similar private sector positions, pay rates and a resulting compensation structure have been established. Internal equity is obtained as a result of the proposed compensation and grading schedule.
3. “Comparison to Peers” addresses the issue of District Office operations with respect to peer districts to determine if staffing levels are similar to peers.

This report serves as introduction to the entire project and provides details for the “Evaluate and Redistribute” phase. Additionally, the “Executive Summary” relating to other phases is included in this report.

Background

Milton School District office staff had consisted of 8.5 FTE and now consists of 7.0 FTE, or an 18% reduction of annual capacity. Essentially, this means the equivalent of 1.5 FTE’s, representing about 3,000 hours of capacity, must be distributed among remaining staff. If that work is distributed equally, workloads of each existing employee will be increased by 21% or 430 hours.

Since it is irrational to believe employees have 21% of unused capacity, a systematic approach to obtaining a solution must be used. The following provides a framework for understanding the approach.

Jobs are grouping of tasks to be performed. Generally, job grouping is arranged by degree of special skill or knowledge, such as a Nurse has, or by the volume of a task, such as a mail clerk receiving thousands of pieces of mail each day. In many

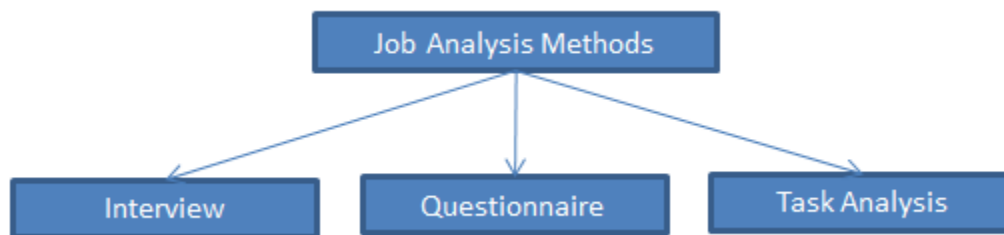
organizations, low volumes of activity require that jobs be constructed of different tasks. A very small clinic may have the Nurse also serving as mail clerk.

Grouping tasks into jobs is done for several reasons and is performed using one of the following techniques.

Given the magnitude of staff reduction, a combination of the following actions will be necessary:

- ELIMINATION OF SOME TASKS
- Restructuring of current jobs
- Recommending increasing staff from the reduced level.

As a result, several different analytical approaches were used in order to evaluate workload.



Interview Method: In this method, an employee is interviewed either informally or with a questionnaire, which helps the interviewer know what exactly an employee understands about their own job and responsibilities.

While this method obtains employee participation in the process, the approach has issues:

- Employees are reluctant to indicate that they have a significant portion of excess capacity.
- The technique is time consuming since the employee needs to describe their job and issues involved.
- Employees frequently forget a number of items, unless they are prompted.

Interviews occurred after employees prepared task questionnaires. Interviews were performed by reviewing the list of tasks performed by the employee during the course of the year.

Questionnaire Method: The questionnaire method is commonly used in job analysis and consists of questionnaires presented to employees and managers. The questionnaire is administered using an Internet based approach with individualized questionnaires based on current job descriptions.

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The questionnaire method has the following concerns:

- The level of detail provided by employees can vary widely.
- Employees respond according to how they believe results will affect them.

Employees were asked to identify twenty tasks in each of several categories (daily, weekly, monthly, quarterly, and annual/project). An initial list of 218 typical District office tasks were provided as an aid. The initial list of tasks was developed using data provided by the School District of Milton and data from several other Wisconsin school district office staff job descriptions.

Task Analysis Method: This approach consists of analyzing tasks to be performed by creating an inventory based on existing job descriptions and supplemented by observation, interview, and questionnaires. In this approach, employees are provided a list of typical tasks and asked to provide any additional list of tasks required by the organization without regard to who is performing the task.

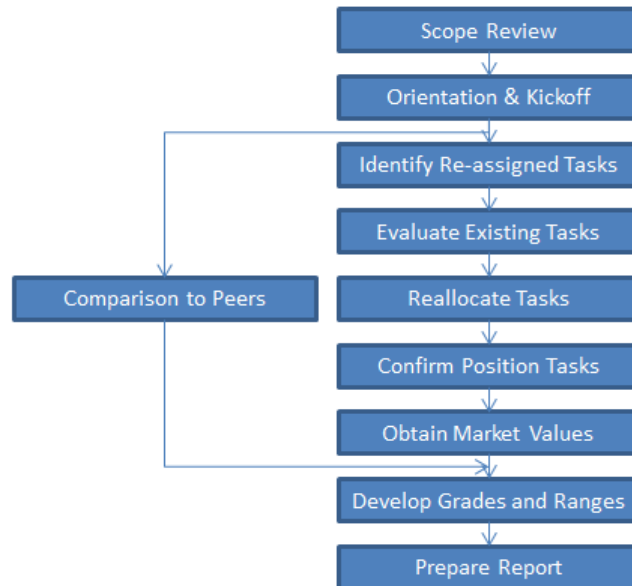
Job design involves integrating job responsibilities or content and certain qualifications that are required to perform the same. Jobs are the set of tasks to be performed by an individual.

The person should have the requisite skills and abilities to perform the task. For example, a payroll specialist would be expected to have knowledge of regulations and laws regarding payroll.

Study Process

The following diagram provides an overview of the overall project study process.

Process Overview



The following assumptions were used:

- Tasks may be eliminated
- Tasks may be performed by different methods
- Tasks may be re-distributed

The following School District of Milton positions were included in the project.

Title	Years at District	Contract Days
Special Education Secretary	11	253
Bookkeeper	23	253
Payroll Specialist	20	253
Accounts Payable Specialist	5	253
Superintendent Administrative Assistant	12	253
Family Enrollment Center	22	253
Human Resources	5	261

Total annual capacity is 1,966 hours for all positions except Human Resources. Note that annual capacity is total capacity from which personal days and similar items should be removed.

Evaluate and Redistribute

Task evaluation consisted of:

Use of an online questionnaire to identify tasks of 15 minutes or more occurring:

- Daily (Tasks that occur every day, whether scheduled or unscheduled, such as inquiries from District parents.)
- Weekly (Tasks that occur every week, such as weekly payroll.)
- Monthly (Tasks that occur every month, such as Board of Education meetings.)
- Project or Annual (Tasks that occur on a yearly basis, such as budget preparation.)

School District of Milton employees participated in a project orientation and instructional session. Access credentials were emailed to each participant for completion of their PTQ, which had been pre-loaded with tasks previously identified by School District of Milton.

Upon employee completion of the Position Task Questionnaire, estimates of time required for tasks were developed using percentages of time converted into hours. The results were displayed as the typical average daily hours, weekly hours, monthly hours, and project/annual hours. When all categories of hours are considered, the total hours should not exceed the total annual capacity of the employee.

The results were then shared with employees in order to ensure all items were accurately presented.

Modifications and adjustments were made to balance workloads or to place tasks into improved job groupings. (Recall that each employee identified tasks they were aware of and the 1.5 FTE of tasks may not have been on anyone's current list of tasks.)

Subsequent adjustments were made and revised results shared with Administrators.

As mentioned, reduction of 1.5 FTE should have nominally increased workload of remaining employees by 430 hours per year. After accounting for all tasks, some tasks were identified as items that may be discontinued and some were identified as capable of inclusion into current positions.

It is impractical to account for every task and time for each employee in the relatively short time frame afforded for this study. As a result, considering new total workloads must be viewed with caution.

Workloads were then reviewed for reasonableness in terms of workload by person and distribution of tasks.

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It should be noted that time to perform tasks has been based on the percentage of time the employee *currently* spends on the task. This approach does not establish if the time is the amount of time that should be expended.

Validation was performed by considering time per day by person and comparing total time to annual capacity. Since it is not possible or practical to develop totals that equal 100% of capacity, a reasonable range was considered as acceptable. In general, the goal was to avoid workloads that exceeded annual capacity.

Although these positions are not directly affected by traditional “personal, fatigue, and delay” (PFD) considerations, establishing a position where the workload routinely exceeds normal capacity should be avoided.

Adjustments to distribute work equitably and logically (placing tasks in logical groups) were made.

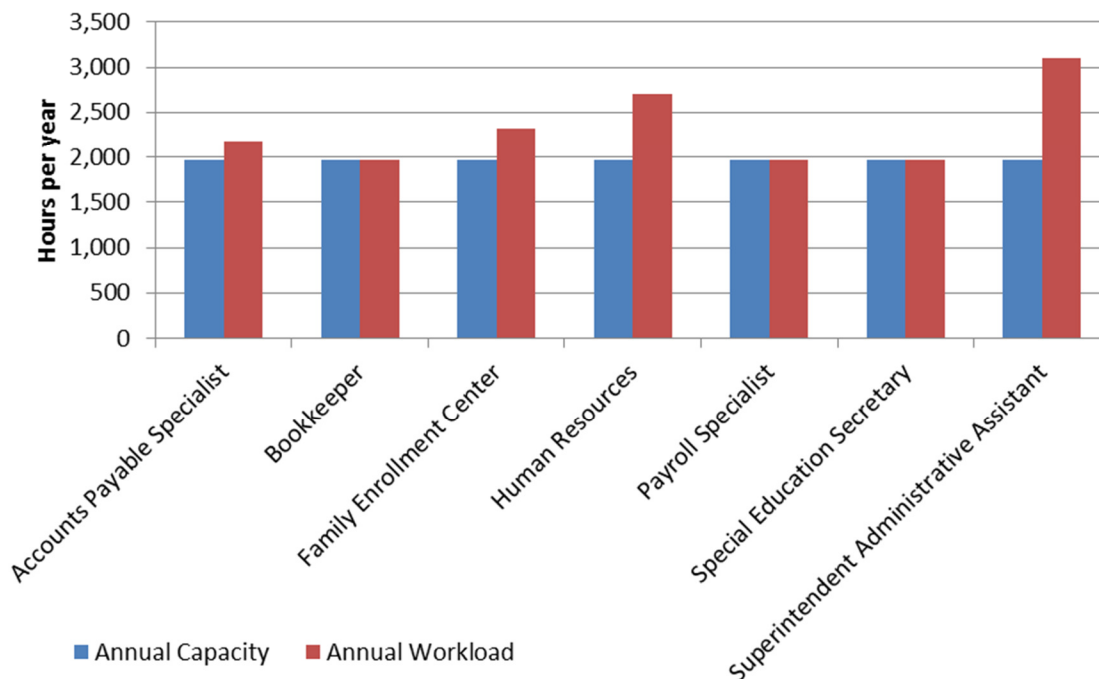
Three (3) positions (Bookkeeper, Payroll Specialist, and Special Education Secretary) did not have new tasks allocated to them by participants themselves. (See Appendix B.) As a result, an assumption was made that those three (3) positions were essentially “fully loaded” prior to the reduction. Equally significant is the assumption that those three positions were accomplishing their tasks within the normal work time per year. This means that the study time for the Bookkeeper, Payroll Specialist, and Special Education Secretary are treated as “at capacity” regardless of the time estimating algorithm.

Position	Annual Capacity	Total Annual Hours	Available or Excess
Accounts Payable Specialist	1,966	2,173	-207
Bookkeeper	1,966	1,966	0
Family Enrollment Center	1,966	2,322	-356
Human Resources	1,966	2,708	-742
Payroll Specialist	1,966	1,966	0
Special Education Secretary	1,966	1,966	0
Superintendent Administrative Assistant	1,966	3,096	-1,130
Total Office	13,762	16,196	-2,434

Positions highlighted in light green did not have tasks added to their position and are considered “at capacity”.

Figure 1

Workload by Position



The resulting tasks by position were used to develop “job descriptions” needed for developing market pricing comparisons.

Evaluate Compensation

The data, findings, and recommendations are described in “Compensation Review / Recommendations for School District of Milton”.

Comparison to Peers

The data and findings are described in “Comparison to Peer Districts”.

Wisconsin’s 2012 DPI database was the source of this analysis. That database contains 172,000 records of all Wisconsin teachers and office staff. The data are provided by school districts near the end of each calendar year.

Of 426 districts, 21 were selected as “peers” having a total staff (administrators, teachers, support, etc.) within the range of 10% +/- of School District of Milton.

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The following districts are those considered peers.

District	Name	Total Staff
0140	Antigo Unified School District	554
0170	Ashland School District	562
1316	De Forest Area School District	513
1380	Delavan-Darien School District	493
1638	Elkhorn Area School District	499
2296	Greendale School District	574
2758	Kaukauna Area School District	540
2835	Kimberly Area School District	540
3311	Marinette School District	510
3444	Menomonie Area School District	574
3612	Milton School District	537
3675	Monona Grove School District	540
3787	Mosinee School District	498
3794	Mount Horeb Area School District	507
3955	New London School District	497
3962	New Richmond School District	578
4781	Rhineland School District	545
4802	Rice Lake Area School District	530
5390	Slinger School District	487
5439	South Milwaukee School District	520
6370	West Salem School District	549

In general, the School District of Milton operates with lower support staff than peer districts when considered by ratios of support staff per school or by teacher.

Findings

The following table summarizes the changes by position of tasks redistributed. Green highlight indicates positions with no changes from the present.

Position	Discussion
Accounts Payable Specialist	Requisition operator added, need to establish impact
Bookkeeper	No additional tasks
Family Enrollment Center	Timesheets for substitutes added, need to establish impact
Human Resources	Summer school and recreation payroll, transporting students added, need to establish impact
Payroll Specialist	No additional tasks
Special Education Secretary	No additional tasks
Superintendent Administrative Assistant	ESEA grants, staff development, clergy luncheon, summer curriculum, teacher induction, District/paper

	calendar, and employee recognition added, need to establish impact.
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As mentioned earlier in this report, the 1.5 FTE should have represented about 3,000 hours of work to be redistributed. The project has not been able to establish that tasks identified for the 1.5 FTE total that amount.

As noted in Figure 1 “Workload by Position”, total annual hours for some positions exceeds annual capacity. While the situation is less than ideal, tasks that have been redistributed appear to be within the feasible range.

A key issue relates to the tasks or activities that were not redistributed. If any of those tasks are considered necessary, then the matter is probably not realistically possible.

Militating Factors

- During the course of the orientation and in subsequent discussions, an issue related to “waiting for the computer” was mentioned. If workloads have been established that require perfect work environments for success, then the workloads should be reduced.
- Illness and other matters for consideration. Having an employee absent because of illness from a staff of dozens can have a relatively small impact. Having the same situation for a staff of seven has a much greater impact, especially if the workloads are set to the highest feasible level.

Solutions may be found by allocation of some work to school staff.

Several reports are attached:

1. The tasks performed by the 1.5 FTE.
2. Tasks, activities, and initiatives to be eliminated.
3. Proposed task assignments.
4. Market pricing of seven positions using the new task assignments.
5. Proposed grade structure for the new position assignments.
6. An analysis comparing District Office staffing for peer Wisconsin school districts.

Conclusion

Thank you for the opportunity to work with the School District of Milton on this important project.

Respectfully submitted,

A handwritten signature in black ink, appearing to read "Lyle Heller".

Confidential
Principal

Lyle Heller, MBA
Senior Consultant

Appendix A Tasks Assigned to the 1.5 FTE

The following lists tasks that had been previously assigned to the 1.5 FTE. Tasks identified by yellow highlight were not found on the redistributed task list shown as Appendix B.

Person 1

Back-up for Payroll
Back-up for Substitutes - AESOP
District Insurance
District Vehicles
Mary Ellen's Assistant
MRec Payroll/Hiring
Staff Directory
Summer School Payroll/Hiring
Transporting Students
Website Updating

Person 2

*Curriculum
*New Teacher Gifts
*Testing/Assessments
CWT Data
ELL
ESEA Grants - Title I, II, III
Induction (Years 1-3)
Late Starts
Learning Forward Model
Paraeducator Orientation & Training
PI-34
PRISM
Randy's Assistant
Report Card Envelopes
Staff Development
Teacher Induction Program

Eighteen (18) tasks are highlighted in yellow. Seven (7) tasks are found on the redistributed task list shown in Appendix B. Appendix B identifies twelve (12) tasks added, but only five (5) are from the 1.5 FTE's, suggesting that new tasks were inserted.

The essential issue for Administration is to determine if any highlighted tasks are actually required. Among items of particular note are: website updating, PI-34, and PRISM. Items such as website updating may be contracted. This action should be beneficial since websites are becoming an extremely valuable means of

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communicating with parents and students. However, maintaining a website is requiring a greater amount of time.

Appendix B Tasks Redistributed to Staff

The following lists tasks prior to reduction of 1.5 FTE and following redistribution of those tasks. The redistribution was performed by School District of Milton personnel. Tasks shaded in light green are tasks that were added to each position.

Three positions did not have tasks added to prior workload: Bookkeeper, Payroll Specialist, and Special Education Secretary.

Twelve (12) tasks are highlighted in light green indicating the task has been added to the position. During the validation phase, this aspect was verified as having occurred.

Comparison of Initial Before and After Adjustment of Tasks	
Before 1.5 FTE Reduction	After 1.5 FTE Reduction
Superintendent Administrative Assistant	
*Agenda/Packets	*Agenda/Packets
*Allen Scholarships	*Allen Scholarships
*Elections	*Elections
*Homeschooled	*Homeschooled
*Minutes	*Minutes
*Open Enroll/Tuition Waiver	*Open Enroll/Tuition Waiver
*Opening of School	*Opening of School
*Policy	*Policy
*Student Accident Forms	*Student Accident Forms
*Student Count	*Student Count
*Student Insurance	*Student Insurance
*Suspensions/Expulsions	*Suspensions/Expulsions
	• ESEA Grants - Title I, II, III
	• Staff Development
	• Summer Curriculum
	• Teacher Induction Program
Board Secretary:	Board Secretary:
Building Use Forms	Building Use Forms
Bus Request Forms	Bus Request Forms
	Clergy Luncheon
	District/Paper Calendar
DPI Reports	DPI Reports
	Employee Recognition
Mike's Assistant	Randy's Assistant
Staff Awards	Staff Awards

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Students:

Students:

Human Resources

- *Background Checks
- *Contracts/Letters of Employment
- *Credit Advancement
- *Flex Spending
- *FMLA
- *Injury Reports/Workers Comp
- *Insurance
- *Licenses
- *Retirees/OPEB
- *Staff Handbooks
- *Time Off
- *Vacancies/New Hires
- Benefits:
- DPI Reporting - PI 1202
- Human Resources:
- Salary and Fringe

- *Background Checks
- *Contracts/Letters of Employment
- *Credit Advancement
- *Flex Spending
- *FMLA
- *Injury Reports/Workers Comp
- *Insurance
- *Licenses
- *Retirees/OPEB
- *Staff Handbooks
- *Time Off
- *Vacancies/New Hires
- Benefits:
- DPI Reporting - PI 1202
- Human Resources:
- MRec Payroll/Hiring
- Salary and Fringe
- Summer School Payroll/Hiring
- Transporting Students

Bookkeeper

- PI - 1505 AC Aid Certification
- PI 1504 Budget SAFR Report
- PI 1504-SE Budget Report
- PI 1505 Annual SAFR Report
- PI 1505-SE Annual Report, including WI Act 221
- Accounts Receivable - District (reconcile / post revenues) - support Financial Secretaries
- Allen Scholarship - Initiate Grant Application
- Budget Development / Management - support Director Business Services
- Cash Flow - analysis / prepare bid documents / wire transfer
- Consortium Claims - all Funds
- Coordinate annual audit
- District cash and Investment accounts - maintain signatories
- District Office - cash receipts / bank deposits / post aid payments
- DPI Reports

- PI - 1505 AC Aid Certification
- PI 1504 Budget SAFR Report
- PI 1504-SE Budget Report
- PI 1505 Annual SAFR Report
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- District Office - cash receipts / bank deposits / post aid payments
- DPI Reports

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Estate Trust - Fund 21 - checking and saving accounts
 Federal & State Grant Claims - all Funds
 Fiscal Year End - post payables, receivables, perform rollover
 General Ledger - all Funds - reconcile / maintain
 Gifts and Donations - track / report
 Long Term Debt - Funds 38/39 - maintain schedule, process payments
 MAC / SBS report
 MHS Scholarship Fund - checking/savings
 Monthly statement reconciliation / voucher preparation - Riteway, Ace, Elan
 Parochial Transportation contracts - reimbursements
 Postage by Phone - district support/management/replenishment
 Quarterly Budget Reviews - all sites and departments
 Run/review daily requisition report prior to PO processing
 Site Based Budget - support District requisition operators / budget managers
 Skyward Financial Management - primary contact / technician
 Tax Levy Certifications (prepare/submit)
 WUFAR - Chart of Accounts - adherence to, maintenance of

Estate Trust - Fund 21 - checking and saving accounts
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 Skyward Financial Management - primary contact / technician
 Tax Levy Certifications (prepare/submit)
 WUFAR - Chart of Accounts - adherence to, maintenance of

Accounts Payable Specialist

Accounts Payable
 Fixed Assets
 Purchase Orders

Accounts Payable
 Fixed Assets
 Purchase Orders

Requisition Operator

Payroll Specialist

Payroll
 Time Sheets
 W2's

Payroll
 Time Sheets
 W2's

Special Education Secretary

ECH Screening
 Special Education

ECH Screening
 Special Education

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Susan's Assistant

Susan's Assistant

Family Enrollment Center

Family Enrollment Center
Reception
Substitute Coordinator - AESOP

Family Enrollment Center
Reception
Substitute Coordinator - AESOP
Timesheets/Worksheets (Subs)

Appendix C Tasks Identified by PTQ

Appendix C provides a list of 273 tasks identified by participants using the PTQ.

The goal was to develop a list of tasks that began with an action verb and identified some work product. For a variety of reasons, that goal was not always possible.

Appendix D Tasks by Position

Appendix D provides tasks identified performed by employees on a daily, weekly, monthly, and annual/project basis. The tasks are arranged in descending order of amount of time for the employee.

Appendix E Interviews with Administrative Support Staff

Appendix E provides a summary of the interviews held with support staff after completion of Position Task Questionnaires.