



PORTLAND PUBLIC SCHOOLS

# 2018-19 Budget Board of Education Update

May 8th 2018



# Today's Focus

- Talent and Culture
- Facilities Management
- Business Operations
- Chief of Staff
- Information Technology
- Finance and Accounting
- General Counsel



PORTLAND PUBLIC SCHOOLS

# TALENT & CULTURE 2020:

BRINGING EMPLOYEE EXPERIENCE INTO FOCUS

**Kylie Rogers**  
Chief of Talent & Culture



# TALENT & CULTURE 2020:

BRINGING EMPLOYEE  
EXPERIENCE INTO FOCUS

## Sow

*create exceptional candidate  
& employee experiences*

## Grow

*develop growth pathways that  
support talent diversity*

## Harvest

*build a culture of connection,  
accountability, and care*





# Priorities for remainder of this year

- Support Administrators in school personnel hiring & onboarding
- Transform process for leave, absence, and disability management into an integrated, proactive, and consistent approach
- Create exceptional new educator experience
- Finalize process optimizations in partnership with Finance & Payroll (to improve new employee experience and reduce FTE burden)
- Hire vacant HR leadership roles (Talent Operations & Talent Development & Diversity)



# Budget

	Proposed Budget \$	Office budget %	General Fund %
<b>Talent and Culture</b>	<b>\$6.4M</b>		<b>1.00%</b>
Talent & Culture PMO	\$0.9M	14.0 %	
Talent Operations	\$2.4M	38.0 %	
Talent Development & Diversity	\$1.6M	25.0 %	
Talent & Labor Partnership	\$1.5M	23.0 %	
<b>Substitute Workforce</b>	<b>\$12.8M</b>		<b>2.00%</b>
Site Support Instructors	\$0.8M	6.0 %	
Substitute Educators and Counselors	\$10.5M	82.0 %	
Substitute EAs, Paras, and Secretaries	\$1.5M	12.0 %	
<b>Total F</b>	<b>\$19.2M</b>		<b>3.00%</b>



# TALENT & CULTURE 2020: BRINGING EMPLOYEE EXPERIENCE INTO FOCUS



## Talent Operations + Project Management

### HR Shared Services

- Employee customer service
- Leave management & benefits
- Job posting & advertising
- Data management

### Project Management

- Technology
- Reporting & analytics
- Continuous improvement

### 2018-19 TRANSFORMATION FOCUS:

**service & process definition**

**technology-enabled service**

**data-driven decision making**

**SEAMLESS | PAINLESS | INVISIBLE**





# TALENT & CULTURE 2020: BRINGING EMPLOYEE EXPERIENCE INTO FOCUS



## Talent Development & Diversity

### Talent & Organization Development

- Organizational culture
- Performance development
- Career development

### Talent Diversity & Employee Experience

- Employer brand & outreach
- New employee onboarding
- Employee engagement

#### 2018-19 TRANSFORMATION FOCUS:

**talent diversity strategy**

**new educator experience**

**performance development**

**EMPLOYEE-DRIVEN | VALUES-ALIGNED | COMPETENCY-BASED**





# TALENT & CULTURE 2020: BRINGING EMPLOYEE EXPERIENCE INTO FOCUS



## Talent & Labor Partnership

### Talent & Culture Consultation

- Performance development
- Investigation & discipline support
- Workplace culture

### Labor Partnership

- Contract administration
- Labor negotiation

### 2018-19 TRANSFORMATION FOCUS:

**talent partnership model**

**performance development**

**labor partnership strategy**

**RESPONSIVE | SUPPORTIVE | EXPERT**



PORTLAND PUBLIC SCHOOLS

# Facilities Management

Stephanie Soden  
**Chief of Staff**



# Mission

*“Facilities Management supports classroom teaching and learning by providing safe and healthy environments that are conducive to learning for students and staff.”*

*This division manages the Custodial, Maintenance, Facility Planning, Project Management and Construction for over 9M square feet of facilities and 600+ acres of grounds.*



# Priorities for remainder of this year

- **Planning and Asset Management:**
  - Award contract to and commence Facility Condition Assessment (FCA)
  - Fill vacated GIS Specialist, Capital Planning Program Manager positions
  - Space Planning to support Middle School Conversion
- **Project Management & Construction:**
  - Implementation of the Middle School Conversion Projects
  - Continued planning for critical projects for the 2018-2019 year
  - Implement training for project managers (procurement rules, permitting, internal processes, etc)
  - Close out of remaining project for this fiscal year



# Priorities for remainder of this year

- Maintenance, Custodial & Warehouse:
  - Finish fiscal year close-out of projects, final planning and adjustments of summer work and begin execution of summer work: Summer cleaning of buildings, roof repairs, boiler inspections and compliance, generator maintenance, alarm compliance, plumbing repairs etc
  - Plan for next fiscal year reduced FTE and budget:
    - Modify cleaning goals and expectations. Communicate the changes to the schools and principals
    - Prepare for reducing Pony deliveries starting in the summer
    - Develop plan for prioritization of work orders and communicate out to the schools and principals
    - Maintain Bond support for commissioning and closing out modernizations project and continue to provide input to design of next group of projects.



# Budget

Facilities Management	Proposed Budget \$	Office budget %	General Fund %
Planning and Asset Management	\$1.7M	3.9%	0.29%
Maintenance	\$11.1M	22.3%	1.70%
Custodial	\$22.2M	44.8%	3.40%
Warehouse	\$0.9M	1.8%	0.13%
Project Mngmt, Construction & Support	\$3.3M	6.7%	0.51%
Utilities	\$10.2M	20.5%	1.60%
<b>Total</b>	<b>\$49.4M</b>	<b>100%</b>	<b>7.60%</b>



# What services we are no longer providing

- **Planning and Asset Management:**
  - CUB availability may be limited by lack of custodial FTE.
  - No District FTE to undertake critical enrollment balancing analysis and option development.
- **Project Management & Construction:**
  - Reduction in the overall number of projects delivered due to the reduction in project manager capacity and available project funding (Reductions include: 2 FTE and \$500K of repairs and maintenance budget).
  - Limited availability to fund projects that are not “critical” in nature. The limited budget will need to be steered toward projects that focus on things like maintaining domestic water service, heating & ventilation, proper sanitary and storm sewer operation and roofing, to name a few.
  - It is anticipated that Emergency type projects will become more prevalent as old building systems continue to fail at a faster rate. The cost for these projects is higher, due to the age of our systems and buildings we often times cannot repair and must do a full system replacement.





# What services we are no longer providing

- Maintenance, Custodial & Warehouse:
  - Reduce pony deliveries
  - Reduced ability to clean facilities (e.g. bathrooms/trash only, classrooms may not be cleaned daily) will be modifying cleaning process to maximize efficiencies (Reduction Facility Services: 14.25 FTE Custodian vacancies and 1 Quality Assurance Trainer)
  - Reduced ability to accomplish work orders not having emergency or high priority. Means volunteer/grant work and all routine work orders may be delayed or not accomplished. Focus will be on work orders essential to the operation of a facility (Reduction Maintenance: 9 FTE and \$500K in repairs and maintenance budget)
  - Moderate size projects and even some small projects will have to be accomplished through contracts so in-house maintenance staff can concentrate on emergency and high priority work orders essential to building operations and recurring maintenance
  - Reduced ability to care for facility grounds



PORTLAND PUBLIC SCHOOLS

# Business Operations

Stephanie Soden  
**Chief of Staff**



# Priorities for remainder of this year

- Security:

- Fill the Director of Security Services position
- Amend our contracted security contracts (First Response & Portland Patrol)
- Provide a safe environment for our end of year activities (proms and graduations)

- Transportation:

- Finish negotiations and ratification of a new labor contract with the ATU for our bus drivers
- Negotiate a contract extension with First Student for home to school transportation services
- Issue a new RFP for a new home to school contract for yellow bus vendors
- Begin implementation of new routing software that will ensure accurate routing for bus drivers, on time performance tracking and analytics to be able to track efficiencies in operations



# Budget

Business Operations	Proposed Budget \$	Office budget %	General Fund %
Student Transportation	\$24.0M	81.7%	3.69%
Security Services	\$2.7M	9.4%	0.42%
Nutrition (GF)	\$0.1M	0.4%	0.02%
Publications	\$0.9M	3.1%	0.14%
Purchasing & Contracting	\$1.6M	5.4%	0.25%
<b>Total</b>	<b>\$29.3M</b>	<b>100%</b>	<b>4.52%</b>

Notes:

Nutrition budget is fund 202 the above is General fund only and supports 1.75 FTE in the 501 deli

Publications and Purchasing & Contracting were previously under Finance



# What new services we are providing

- Security:
  - None at this time
- Transportation:
  - Student Transportation will be providing additional bus routes to support the two new middle schools opening in 2018-2019 (\$700K)
  - Student Transportation will be providing additional bus route to support the ACCESS program to their yet to be named location for 2018-2019 (Unknown cost impact at this time)



# What services we are no longer providing

- Security:
  - Limited field supervision for the 27 Campus Security Agents (Reduction in a previous budget cycle: Campus Security Supervisor)
  - The proposed budget contains an add for \$250K to cover contracted security. This will only allow us to maintain our current service level
  - Will not be able to add additional Campus Security staff to high schools
- Transportation:
  - Strategies will need to be developed to mitigate for the loss of our Communications Manager in the budget and for the lack of customer services staff in the department to manage the inbound and outbound communications.



PORTLAND PUBLIC SCHOOLS

# Office of the Chief of Staff

Stephanie Soden  
**Chief of Staff**





# Mission

*To effectively engage the community and school system toward the shared goal of realizing our vision of pride and excellence in our schools and success for every student*



# Priorities for remainder of this year

- Fill repurposed open positions
- Continue to improve and enhance communication and collaboration with school communities and key stakeholders
- Support the work and processes of the Board of Education
- Implement and enhance government accountability and access
  - Revised complaint policy
  - Title IX program



# Focus for 2018-19

- Inventory positions and workload; realign to district strategic plan
- Streamline processes for internal/external communications strategy, planning and execution
- Develop and implement meaningful engagement practices with school communities
- Build PPS brand to reflect a culture of excellence, stewardship and partnership



# Budget

Chief of Staff	Proposed Budget \$	Office budget %	General Fund %
Ed TV Svcs	\$0.3M	6.7%	0.05%
Board Of Education	\$0.5M	11.1%	0.08%
Communications & Public Engagement	\$1.9M	42.2%	0.29%
Chief of Staff	\$1.1M	24.4%	0.17%
Translation & Interpretation	\$0.7M	15.6%	0.11%
<b>Total</b>	<b>\$4.5M</b>	<b>100%</b>	<b>0.70%</b>

\*Does not include Office of the Superintendent Budget

# Proposed Investments

Proposal	Proposed By	Estimated Spend
Learning Gardens	Board Member	\$155 - \$235K (12 - 18 Schools @ \$13K per School)
Vision and Strategic Plan Development	Board Member	\$150 - \$250K (estimate)
Support for Boundary Reviews and Adjustments (to include community engagement)	Board Member	\$150 - \$250K (estimate)
Districtwide Focus Option Review	Board Member	\$50 - \$150K (estimate)
Policy Development Capacity	Board Member	\$50 - \$150K (estimate)
Resources and Capacity for Future Bond Planning, Long-Term Facilities Planning, and Health/Safety/Accessibility Strategy Development	Board Member	\$150 - \$250K (estimate)

- Estimates based on assumed scope



PORTLAND PUBLIC SCHOOLS

# Department of Technology

Travis Paakki

**Interim Senior Director of Technology**



# Mission

*The PPS Department of Technology mission is to support academic and operational excellence by implementing and operating innovative technology that ensures student success regardless of race, class, or identity.*





# Priorities for remainder of this year

- Redistribution of work to account for staffing level changes and moving staff into the new organizational structure.
- RFP completions and contract approvals for process automation: IT Service Management, Identity and Access Management, Outsourcing PeopleSoft Hosting and Administration
- Implementations: Pepper Professional Development Learning Management System - ready for compliance training by July 1. Transportation - building interfaces between existing and new systems.
- Investigating development innovations to further reduce data center burden.



# Budget

Information Technology	Proposed Budget \$	Office budget %	General Fund %
IT Service Area Direction	\$0.72M	6.0%	0.11%
Systems Analysis Services	\$1.1M	8.9%	0.16%
Systems Development & Integration	\$2.3M	20.0%	0.36%
Technical Operations	\$2.5M	20.9%	0.38%
Information Security	\$0.1M	0.8%	0.02%
Client Services & Collaboration	\$3.5M	29.5%	0.53%
Central Telecom	\$1.6M	13.7%	0.25%
<b>Total</b>	<b>\$11.82M</b>	<b>100%</b>	<b>1.81%</b>



# What new services we are providing

- Infrastructure device refreshes on some out-of-life switches and phones
- Refreshed and highly integrated professional development learning management system
- Improved network connectivity to some schools
- More efficient IT service management platform



# What services we are no longer providing

- Customized voicemail boxes in the classroom.
- PeopleSoft customizations and enhancements.
- Dedicated staff for physical security support.
- IT funded bond resources.
- Infrastructure, Client Services, and Applications Support will provide slower response times to requests.
- Any increase to the number of deployed chromebook devices is on hold.



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# Finance Department

Ryan Dutcher (for Jim Scherzinger)  
**Interim Budget Director (CFO)**



# Mission

*Our mission is to be good stewards of Portland Public School's resources. We safeguard the district's assets, and provide reporting, information, and analyses to help our leadership make decisions that provide the best outcome from our limited funds.*



# Priorities for remainder of this year

- Retaining, recruiting, and hiring talent
- Process improvements necessary to be more efficient
- System enhancements to streamline work across the district
- Critical software applications to improve quality and timeliness of data and analyses
- Reporting and information to build improved financial management capabilities
- Construct a five-year financial plan





# Budget

Finance	Proposed Budget \$	Office budget %	General Fund %	
Accounting	\$3.3M	11.0%	0.50%	
Budget and Analytics	\$2.4M	8.0%	0.40%	
Payroll	\$0.8M	3.0%	0.10%	
<b>Sub Total Finance Operations</b>	<b>\$6.5M</b>	<b>22.0%</b>	<b>1.00%</b>	
School-Focused Costs	\$5.9M	20.0%	0.90%	
Transfers and Interest	\$7.9M	27.0%	1.20%	
<b>Total Finance 2018-19</b>	<b>\$20.3M</b>	<b>69.0%</b>	<b>3.00%</b>	
Transferred to other Depts	Publication Services	\$1.7M	6.0%	0.30%
	Purchasing & Contracting	\$1.6M	5.0%	0.20%
	Risk Management	\$5.7M	20.0%	0.90%
<b>Total Finance (Before Transfers)</b>	<b>\$29.3M</b>	<b>100%</b>	<b>5.00%</b>	



# What new services we are providing

- Close partnerships through Forecasting, Budget, and Analysis group
  - Financial information and analysis to support decision making
- Process improvements and better utilization of employees' time
- Cash forecasting and management to optimize investment returns
- Budget software and improved process to collect feedback, provide analyses, and monitor progress during budget build
- Reporting and analysis to help district better manage resources



# What services we are no longer providing

- No reduction in service - eliminating manual, inefficient steps in major processes
- Reduce the amount of burden created by unnecessary work, both in finance and across the district



PORTLAND PUBLIC SCHOOLS

# GENERAL COUNSEL

Liz Large

**Interim General Counsel**



# Mission

The mission of the General Counsel office is to provide exemplary, timely legal advice that promotes district goals, accelerates equity, preserves relationships, and allows staff and students to focus on teaching and learning.



# Priorities for remainder of this year

- Reduce per-case legal spend
- Strategic case management
- Continue to provide prompt and efficient guidance to school personnel
- Process improvement
  - Policy, administrative directive development and revision
  - Legal compliance



# Budget

General Counsel	Proposed Budget \$	Office budget %	General Fund %
Internal Legal Counsel	\$1.4M	44.7%	0.20%
External Legal Counsel	\$1.8M	55.3%	0.30%
<b>Total</b>	<b>\$3.2M</b>	<b>100%</b>	<b>0.50%</b>

# APPENDIX