



Warren County School District

J.L.Nick
ASSOCIATES, INC.

Consultant's Report

August 2006



Consulting Project Preface

August 2006

Attached are two documents: The Consultant's Report dated August 2006, and the Keystone Educational Accountability Review (KEAR) dated September 2005.

It is important to note that this project was initiated by Dave Stephany, who at that time was a Senior Consultant with J. L. Nick & Associates, Inc. Dave Stephany is no longer an employee of the firm, and the project was completed by John Nick.

Dr. John DeCaro, retired Superintendent of Schools at Ellwood City Area School District and current adjunct Professor at Westminster College Graduate School of Education, worked with Dave Stephany on Phase I of this report. He also provided technical support to develop the KEAR, which was completed and delivered in September 2005.

The attached reports are directed at satisfying all requirements set forth in the Consulting Proposal dated January 2005.

Consulting Proposal

II. Services Provided

Provide services detailed in three (3) of the Request for Proposal (10/1/04) in the following manner:

A. Evaluate the Business Office using the following template:

1. Is there an overall Plan/Process? **There is no formal plan or process existing. The Consultant's plan or process is identified clearly in Section 3 of the attached report.**
2. Identify strengths: **Within both reports there is information relative to strengths and weaknesses. Within the Business Office it is clear that the employees are well intended, treat each other with respect and professional dignity.**

3. Identify weaknesses: **Within both reports there is information relative to strengths and weaknesses. However, the report clearly identifies weaknesses as they relate to the ability to increase effectiveness and efficiencies of employees because of the lack of programs designed to increase performance and establish performance metrics.**
4. Measure against established protocol, regulatory requirements and best practices: **This is addressed in the KEAR.**
5. Does it provide for each employee:
 - a. Job knowledge and expectations: **In the current structure, these are provided. However, as clearly indicated in the recommendations section of the report, they are not provided to the level necessary to enhance performance and/or employee development.**
 - b. Ability to improve both the job and the organization: **In the current structure, these are provided. However, as clearly indicated in the recommendations section of the report, they are not provided to the level necessary to enhance performance and/or employee development.**
 - c. Opportunity for growth: **In the current structure, these are provided on a limited basis. However, as clearly indicated in the recommendations section of the report, they are not provided to the level necessary to enhance performance and/or employee development.**
 - d. Training: **In the current structure, training is provided. However, as clearly indicated in the recommendations section of the report, it is not provided in the areas necessary to increase the effectiveness and efficiency of human capital.**
6. Evaluate the organization versus the following:
 - a. What is our business role in the education of children: **This is addressed throughout the report but specifically on pages 10 and 16.**
 - b. Who is my boss? **Organizational charts, both current and recommended, are provided in Section 2 of the attached report.**

- c. How are employees at all levels held accountable? **Although addressed throughout the report, it is specifically addressed in Section 3 of the attached report.**
- d. Do employees know what they are responsible for in relation to their job duties & expected outcomes? Although addressed throughout the report, it is specifically addressed in Section 3 of the attached report

7. Does the Business Office have a good organizational structure with defined lines of communication, accountability, authority and responsibility? **This is addressed in Sections 2 and 3 of the attached report.**

B. Organizational Analysis/Operations Review will be conducted in the following manner:

1. Identify the current location of functions within the Business Department and reach agreement on the following:

- a. Identification of functions and their current locations in the Business Office: **Completed in Section 2 of the attached report.**
- b. Agreement on gray areas (areas of overlap, redundancy and/or duplication of effort or lack of accountability).

A function is defined as “a segment of the business necessary for the organization to achieve its business objectives”, i.e. Business Office areas (Tax Collector/Collection; Accounting; Payroll; Accounts Payable; Purchasing/Inventory Control; Internal Auditing Procedures; District Treasurer; Benefits Administration; and Student Accounts Administration).

Completed in Section 2 of the attached report.

- c. Provide a forum that utilizes the experience and expertise of incumbents, the administrative team, coupled with external expertise

and objectivity to develop options and recommendations for organizational redesign, role development and accountability. **Addressed in Section 2 of the attached report.**

- d. Review the purpose, goals, resources (human/other), controls, regulatory compliance, documentation, technology utilization, efficiency and level/quality of communication for current Business Office positions. **This is covered in both the KEAR and Section 1 of the attached report.**
 - e. Review/revise the Organization Chart as necessary and appropriate. **This is covered in Section 2 of the attached report.**
 - f. Review/revise Job Descriptions as necessary and appropriate. **Job descriptions were reviewed as a part of this process. Revisions cannot be completed until decisions are made relative to recommended changes.**
 - g. Review existing Performance Management process and recommend a revised Performance Management instrument, as appropriate, focused on goals/objectives and levels of performance. **This is completed in Section 3 of the attached report.**
 - h. Provide detailed recommendations to enhance the overall operating efficiency of the Business Office. **This is completed in Section 3 of the attached report.**
2. Identify, evaluate and deliver a written needs assessment report, which includes a current analysis of key areas critical to the overall organization, including but not limited to the following:
- a. Instructional Management (Capacity vs. Utilization/Inventory of Teachers & Areas of Certification) and Support Management Teams: **This is contained in Section 1 of the attached report.**

- b. Policy development/administrative procedure development: **This is contained in the KEAR.**
- c. PDE reporting timetables: **This is addressed in the KEAR.**
- d. Flex staffing possibilities; work week: **Recommendations are provided in both Sections 1 and 3 of the attached report.**
- e. Public Relations: **Although not specifically addressed in this report, it is the Consultant's opinion that there were no activities directly related to Public Relations as a function within the organization.**
- f. Absenteeism (Sick Time/Personal Days): **This is addressed in Section 1 of the attached report.**
- g. Turfism: **Turfism exists in each organization and it does exist at WCSD. Section 3 of the attached report deals specifically with Management Development and recommendations to reduce turfism in the organization.**
- h. Desire to utilize existing staff (Professional/Support): **It is the Consultant's opinion that the organization has a strong desire to appropriately utilize existing staff. As stated throughout the report, however, there is no plan to increase utilization or effectiveness of the staff.**
- i. Technology utilization: **This is contained in both the KEAR and Sections 1 and 3 of the attached report.**

Since the preponderance of my recommendations deals with the human resource side of the business, I think it is extremely important that I meet with the Business Office individuals who were involved in this project.

I believe it is extremely important that these people hear the recommendations prior to their being released. Communications of this nature will enhance trust and build positive communications between the Board and Administration.

**Needs Assessment
Organizational
Review Report**

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**Functional Analysis
Report**

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**Functional Analysis
Recommendations**

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