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# Warren County School District

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## Needs Assessment Organizational Review Report

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# I. Project Purpose

To conduct a Needs Assessment and Organizational Review for the Business Office via interviews, on-site visits and data analysis.

In addition, to analyze the current Business Office organizational structure and make suggestions and/or recommendations to enhance organizational and human capital effectiveness.

## II. Process Methodology

### A. Analyze the Business Office as follows:

1. Is there an overall Plan/Process?
2. Identify strengths
3. Identify weaknesses
4. Compare to best practices in the Human Resources field
5. Does it provide for each employee:
  - a. Job knowledge and expectations
  - b. Ability to improve both the job and the organization
  - c. Opportunity for growth
  - d. Training
6. Further identify:
  - a. Do employees know their job duties?
  - b. Are employees held accountable?
  - c. How is their performance measured?
  - d. Is there a process for continuous improvement?
7. Does the Business Office have a functional organizational structure?

## II. Process Methodology (Con't.)

### B. Organizational/Functional Analysis will be conducted as follows:

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.
  - 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; Human Resources; Accounting; Payroll; Purchasing/ Inventory Control; Internal Auditing; Employee Benefits; and MIS).

- c. Provide a forum which utilizes the experience and expertise of incumbents, coupled with external expertise and objectivity to develop options and recommendations for organizational redesign, role development and accountability.
  - d. Prepare recommendations for the Organizational Chart changes as appropriate.

## II. Process Methodology (Con't.)

- e. Review Job Descriptions as appropriate.
  - f. Review existing Performance Management process and recommend changes as appropriate to insure focus on goals/objectives.
  - g. Provide recommendations to enhance the overall operating efficiency of the Business Office.
2. Identify, evaluate and deliver a written needs assessment report, which includes an objective analysis of the Business Office.

In addition, the consultant will address the strengths and weaknesses and provide insights to enhance human capital.

## II. Process Methodology (Con't.)

The purpose is to:

- a. Establish a baseline
- b. Identify areas of agreement
- c. Identify areas of disagreement
- d. Identify strengths
- e. Identify weaknesses
- f. Insure all participants become stakeholders
- g. Provide an objective analysis of information gathered
- h. Provide objective feedback
- i. Utilize consultants' expertise to provide recommendations based on good business practices and experience with similar organizations

Input will be gathered and evaluated in a manner that supports all participants becoming stakeholders. Information will be analyzed and prioritized. Recommendations will be developed and delivered.

## II. Process Methodology (Con't.)

The final needs assessment report, including recommendations, will be prepared and delivered based on what the organization needs to hear, not what the organization wants to hear and will include the following:

- a. Identification of organization strengths and weaknesses
- b. Identification of organization needs
- c. Identification of cost savings/outourcing opportunities
- d. Consultant's overview
- e. Recommendations Implementation options

The report will be directed at strengths and weaknesses of the organization.



# III. Updated Information

There are numerous major incidents which have affected or delayed the delivery of this written report. They are as follows:

- The project was initially reviewed, analyzed and then initiated by David Stephany who was, at that time, a Senior Consultant with J. L. Nick & Associates. Dave Stephany is no longer an employee of the firm and the project was completed by John Nick.
- At the inception of the project, job duties within the Business Office were being modified to accommodate the requirements of the new Pentamation computer system.
- The Administrator of Business Services (Darin Schultz) was recently hired and was inundated with responsibilities and the process of understanding the parameters of his new position.
- Darin Schultz, Administrator of Business Services resigned.
- Petter Turnquist was hired as Business Administrator reporting to both the School Board and the Superintendent.
- The Superintendent, John Grant, left the organization.
- The Board and Administration were extremely busy dealing with the budget process and Act 72.

## IV. Background

In 2005, the Warren County School District is faced with trends and realities that, unless addressed, may impact its ability to provide the quality and level of educational services that have been enjoyed by District stakeholders (Board, Administration, professional and support staff, parents, students, taxpayers) in the past. This situation has evolved over time due to the decline in enrollment/ tax base and the socio-economic realities facing the District. There is also external competition from the Tidioute Community Charter School and Cyber Charter School. In addition, the geographics of the WCSD create logistical challenges to be addressed. Since the 1979-80 fiscal year, District enrollment has declined from 8,876 students to the budgeted figure of 5,628 for the 2005-06 school year. WCSD is the second largest school district in the state of Pennsylvania geographically encompassing approximately 760 square miles.

There have also been changes in the Board of School Directors. All of these factors attribute to overall "opportunities" facing WCSD.

That being said, the Board and administration are committed to providing a system of education that will offer educational opportunities in accordance with a student's interests, abilities, and needs, consistent with available resources.

## IV. Background (Con't.)

The reality is that the STATUS QUO is not an option.

To survive in the twenty-first century, educational organizations like WCSD must constantly improve productivity, reduce costs and work on continuous improvement processes. School districts need to find innovative ways to accomplish their mission for less cost.

“Planning” and “strategic initiatives” are necessary to avoid the need for sudden and potentially harmful decisions. To be successful, it is critical to consider all options – remember the objective is reduce non-productive costs yet focus on improving efficiencies.

A number of programs have been implemented as follows:

- An organizational/functional analysis report
- Strategic Planning committee report focusing on curriculum
- A facilities master plan for Buildings & Grounds

# V. Prologue

It must be noted that the Warren County School District should be commended for its desire to take an “honest” and “candid” look at itself with the express intent of wanting to identify opportunities and provide meaningful improvements.

Every organization has opportunities. The goal for Continuous Improvement is to identify those areas where improvement is required and develop a plan to address them.

# VI. Operations Review

The Mission Statement of the WCSD is to prepare all students to be responsible and productive citizens by providing them with the skills and education necessary to achieve academic and personal success.

Under the direction of the WCSD Board of Directors, the Administrative Team led by the Superintendent and the Assistant Superintendent, is charged with the responsibility of administering the 2005-06 approved budget of \$62,442,658 to meet the mission of the District.

Based upon a cursory review of the Organizational Structure, it appears that WCSD has developed and implemented an adequate "Management" structure. The Superintendent has responsibilities for the overall leadership and functions as the Chief Executive Officer of the District. This individual will be the primary advisor to the Board, is accountable directly to the Board and serves as an ex-officio member. Reporting directly to the Superintendent is J. Hugh Dwyer, the Assistant Superintendent and Executive Director of Curriculum and Instruction. Also direct reports include John Sechriest, Executive Director of Learning Opportunities; Mark Eberl, Executive Director of Support Services; Amy Stewart, Director of Technology and Information Management. Petter Turnquist, Business Administrator reports to the Board and to the Superintendent. Norbert Kennerknecht, Director of Building & Grounds reports to Mark Eberl.

## VI. Operations Review (Con't.)

Others reporting to the Superintendent's Office are Rosemarie Green, Supervisor of Federal Programs and Professional Development and Matt Jones, Coordinator of Grants and Foundation Development Office. These areas along with Technology provide service to both the Instruction Management Team and the Support Management Team. Under the direction of John Sechriest, Executive Director of Learning Opportunities, the following areas exist:

- Special Education
- Warren County Career Center
- Athletics and Extra-Curriculars
- Teaching Coaches
- Nurses
- Guidance Counselors
- Nova Net Coordinator
- Attendance Officer

## VI. Operations Review (Con't.)

The actual delivery of educational services comes through the Building Principals and their reports (Teachers, Athletic Directors, Aides and Clerical Support Staff). These Administrators along with Curriculum Coordinators report into the Office of Assistant Superintendent.

Supporting all of these offices and service areas are Supervisory, Administrative Assistants, Information Specialists, Secretaries, Custodial, Maintenance, Teacher Aides and Cafeteria personnel.

# VII. Consultants' Overview

It is the opinion of the Consultant that all who serve on the Board and the administrative staff provide service to the Warren County School District for the right reasons. They believe that a democratic society is founded on the worth of each individual and the value of his/her unique contribution to that society. To that regard, the Board is committed to provide, through direction and policy, a system of education that will offer unique educational opportunities in accordance with a student's interests, abilities and needs consistent with available human and financial resources. The Board, through the Administration, is responsible for the education of the children of the Warren County School District. Furthermore, it directs the development of a planned program of learning to meet the needs of the students in the District on an individual and collective basis. This educational program shall encourage each student to master skills, to study, to question and research and to make reasoned choices. Simply stated, the Board exists to ensure that the mission of the District is met. This mission is to prepare all students to be responsible and productive citizens by providing them with the skills and education necessary to achieve academic and personal excellence.



## VII. Consultants' Overview (Con't.)

The overall purpose of this project is to provide a framework and a process to address opportunities as seen by the consultant, and establish a "road map" to effective communication, and a productive and efficient work process and environment. The students of the District must be the first priority, the taxpayers the second priority and the employees the third priority. This does not diminish the importance of employees, but the task is to educate students in the best manner possible with an efficient and cost-effective approach". This should be the focus for the District and initiatives related to a "Continuous Improvement Process".

In the early stages of this project it was very obvious to the Consultant that there were some major problems between the Superintendent and the Board. These problems clearly led to ineffective communication and unnecessary finger pointing and stress at the Board level and within administration and staff.

The fact is that it's now nothing more than a page in a history book. The previous Superintendent is gone and the Board will be directing a search to hire a new Superintendent. One of the major objectives in the search is to identify a qualified individual who will not only understand the vision and mission of WCSD, but focus on enhancing communications and developing a positive relationship with the Board and the staff.

## VII. Consultants' Overview (Con't.)

It is the Consultant's recommendation that the Board request that the key administrators of WCSD review very closely the ongoing needs of the organization and develop a plan for the attrition that will occur based on retirements, turnover, etc. This plan should be reviewed and approved by the Board. A well executed plan for dealing with human capital will reap major benefits in terms of outsourcing, job combinations or task elimination, which should result in expense reductions but definitely enhance employee efficiency and productivity.

Since there are a number of key administrators who are close to retirement, succession planning is critical and should be included in a plan to redeploy human capital.

# VIII. Consultants' Recommendations

Some systemic suggestions to improve the level of efficiency are:

- ◆ Review the “bumping” and “posting” criteria for awarding jobs. The current system and contracts focuses on “seniority” versus “skills” and “abilities”. With the technical expertise required to perform many of the jobs that will emerge as a result of Pentamation and other technological advances, continuing the existing process could result in the loss of efficiency. The good news is there is reference to “qualifications” and “testing” in the existing contracts.
- ◆ Ensure that policies for procuring “substitute” professional staff are followed and that the system is not circumvented.
- ◆ Review the following:
  - a. Abuse of unscheduled time off for both Professional and Support staff
  - b. Use of Personal Days by Professional staff in the last month of school
  - c. Distribution of work between clerical/administrative personnel
  - d. Work schedules (8 hours versus 7 hours, summer hours, etc.)
  - e. Automated phone attendant and voice mail
  - f. Investigate automation of payroll process (swipe cards)
  - g. Electronic work order system

# IX. Template for a Good Organization

- ◆ Have a plan.
- ◆ Identify strengths.
- ◆ Identify weaknesses.
- ◆ Look outside the organization and analyze other methods (best practice).
- ◆ Build on strengths.
- ◆ Address weaknesses.
- ◆ Provides for each employee:
  - Job knowledge
  - Performance expectations
  - Ability to improve both the job and organization
  - Opportunity for growth
  - Training
- ◆ Work to get better.
- ◆ The District must realize the following:
  - We are in business to educate children
  - Everyone has a boss
  - Employees must be held accountable
  - Employees expect to be told what they are responsible for

# IX. Template for a Good Organization (Con't.)

- ◆ All successful organizations understand and embrace the following:
  - Empower employees
  - Understand accountability
  - Implement a system to deal with consequences of actions

The most effective way to deal with Employee Relations issues is to consistently follow the Contract or well-defined rules and establish an environment that is Fair, Reasonable, Consistent and Appropriate. Morale is enhanced and an organization is more productive when all employees are held accountable in a positive manner.

# X. Closing Remarks

The Warren County School District is a well-run and intentioned organization which can only get better by addressing and resolving the issues addressed in this report. With work, cooperation and communication, all of these issues can be resolved. Everyone knows the problems and no one knows the exact solution. There is a prevailing feeling of skepticism regarding the ability to implement the changes necessary to make WCSD a world-class school system.

# Report Progress Update

**Information contained in pages 10-22 is information gathered and developed in Phase I of this project by the Senior Consultant from J. L. Nick & Associates that started this project.**

**Page 9 of this report overviews key major events that affected and/or delayed the delivery of this report.**

**The information that follows is the recent functional analysis report conducted by John Nick in Phase II earlier this year.**

The information that follows in this report is segmented into two areas:

- **Function Analysis Report**
- **Board only confidential report (separate report)**