



6300 Alderson Street
 Weston, Wisconsin 54476

TO: Dr. Kristine A. Gilmore, Superintendent
 FROM: Thomas R. Owens, Assistant Superintendent, Business/Personnel Services
 RE: Review of Assistant Superintendent, Business/Personnel Services Position
 DATE: March 3, 2010

The administrative review committee (Lois Alt, Assistant Superintendent, Curriculum, Instruction & Technology, Thomas Owens, Assistant Superintendent Business/Personnel Services, Kristine Gilmore, Superintendent) has completed a study of the Assistant Superintendent Business/Personnel Services.

The committee spent time reviewing the documents entitled board Policy/Rule #2410- Administrative Positions and the job description for the Assistant Superintendent Business/Personnel Services. The review focused on five distinct areas as outlined in board Policy #2410 which are:

- A. Position remain in its present state
- B. Position be eliminated and all services abolished
- C. Position be eliminated and some services be reassigned to other personnel
- D. Have some components of position reassigned to other personnel
- E. Position be redesigned.

The committee reviewed each of these areas and focused on functions, educational impact, and the financial impact of each.

A. POSITION REMAIN IN ITS PRESENT STATE

FUNCTION	EDUCATIONAL IMPACT	FINANCIAL IMPACT
All present essential functions and additional functions of the position would remain intact.	Continuation of high quality services provided for staff, students and community members as specified in the essential and additional functions of the job description for the Assistant Superintendent Business/Personnel Services.	Approximate \$116,000 salary plus fringe benefits

B. POSITION BE ELIMINATED AND ALL SERVICES ABOLISHED

The committee considered the proposal to abolish all services provided by the Assistant Superintendent Business/Personnel Services as an unrealistic option. The duties, services and responsibilities entrusted in the position are essential.

C. POSITION BE ELIMINATED AND SOME SERVICES BE REASSIGNED TO OTHER PERSONNEL

FUNCTION	EDUCATIONAL IMPACT	FINANCIAL IMPACT
Policy and Contract Administration	<ul style="list-style-type: none"> • Loss of ongoing development and administration of contracts, policies, and rules on Business/Personnel Services. • Loss of support evaluating the impact of local, state and federal laws regarding financial, budgetary, personnel, transportation, food service including but not limited to general institutional matters. • Reassign analyzing staff ratios, enrollment projections, support staff needs, compensation and benefit programs, and staffing designs. 	District savings of \$116,000 salary plus fringe benefits.
Planning	<ul style="list-style-type: none"> • Loss of administrative leadership in long-range planning, coordinating, and evaluating Business/Personnel Services programs and service delivery systems. • Loss of an ongoing program of needs assessment, to include space utilization analysis, ongoing research, and prepares/updates long-range plans as needed. • Reassign tasks for district compliance with state and federal legislation relating to Business/Personnel Services. 	
Conflict Resolution	<ul style="list-style-type: none"> • Hire labor attorney as Lead Negotiator for the district, for contract negotiations and represents the district in arbitration situations as determined by the Superintendent. • Reassign resolution of non-certified employee grievances and Americans with Disabilities Act (ADA) compliance requests. • Loss of support regarding the resolution of disputes involving outside contractors or agents. • Reassign counseling with administrators and employees to resolve disputes involving the business operations of the district. • Reassign the conduct of investigations of complaints from public and staff regarding personnel, transportation, buildings & grounds, food services, community services and any other school operations as directed by the Superintendent. 	Increased cost TBD

<p>Budgeting and Financial Planning</p>	<ul style="list-style-type: none"> • Outsource and/or reassign the district's short term borrowing program under arbitrage and works closely with bond counsel to ensure IRS compliance. • Reassign direction of staff in the preparation and development of the Annual School District Budget. • Use legal counsel to oversee the district bonding and long term financing programs. • Outsource for the cash flow management of the district. • Loss of leadership for researching and implementing new budgeting and financial practices as technology and systems improve. • Reassign preparation of resolutions to identify and authorize district depositories. • Reassign or outsource oversight of the district's self-funded health and dental programs and all other employee benefit programs. • Reassign or outsource oversight of the district's errors and omissions, liability, property, and worker's compensation insurance programs and all other insurance programs as needed. 	<p>Increased cost TBD</p> <p>Increased cost TBD</p> <p>Increased cost TBD</p> <p>Increased cost TBD</p> <p>Increased cost TBD</p> <p>Increased cost TBD</p>
<p>Purchasing and Supply Management</p>	<ul style="list-style-type: none"> • Reassign oversight of the purchasing of all supplies, materials and equipment included in the annual operating budget and new buildings. • Reassign oversight for the preparation of suitable specifications and standards and for the utilization of good purchasing principles and procedures. • Loss of review of procedures and records regarding warehousing, storing, trucking and inventory control. 	
<p>Accounting and Reporting</p>	<ul style="list-style-type: none"> • Reassign supervision of the district accounting system. • Loss of financial consulting for formulating policies and decisions. • Provides the proper safeguards for the custody of public funds and makes possible complete reporting as deputy treasurer of the district. • Reassign the timely and accurate preparation of all state and federal budgetary and financial reports. • Reassign oversight of the development and preparation of financial reports required for the operation of the district. • Reassign responsibility of working with the auditor to develop, conduct and maintain a sound internal audit program. • Loss of direction and guidance regarding procedures for record keeping, maintaining of records that prudence and legal requirements demand. • Loss of leadership and oversight in the preparation of the district's Annual Report, Special Education Report and Fall Report to DPI. • Loss of leadership and oversight in the preparation of the district's Annual Meeting Report and reports the budget to the voters of the district and the Annual Meeting and 	

	Budget Hearing.	
Recruitment and Placement	<ul style="list-style-type: none"> • Loss of support to the Superintendent on the hiring and placement of teaching and support staff. • Loss of leadership and oversight regarding the district's personnel operations and appropriate hiring practices and procedures. 	
Supervision and Evaluation	<ul style="list-style-type: none"> • Reassign supervision and evaluation of administrators responsible for custodial operation, community services, transportation, food service, and personnel, and others as needed. 	
Staff Development	<ul style="list-style-type: none"> • Reassign the in-service training of staff in relation to business/personnel services policies, procedures and reports. • Reassign responsibility to serve as compliance officer for the E.E.O.C. and O.C.R. regulations. • Loss of assistance to the Superintendent in developing and reviewing administrative management objectives. 	
Data Processing	<ul style="list-style-type: none"> • Reassign review of data processing systems and equipment, as necessary, to provide better and more complete accounting, budgeting and personnel records. • Reassign duty to review new technology and work with the Director of Technology to utilize new technology to improve business services operations. 	
Plant Construction, Operation and Maintenance	<ul style="list-style-type: none"> • Loss of leadership and support in determining and planning for school plant needs and in acquiring school sites and managing school property. • Loss of leadership and support in working with architects to see that needs are properly translated into final plans, with attorneys and financial advisors to effect suitable financing, with bidders to secure economical contracts and with contractors to provide satisfactory building facilities. • Reassign leadership and oversight for providing, operating and maintaining facilities that will assure maximum educational utility as well as a healthful, comfortable, safe environment for pupils, teachers and the public. 	
Environmental Issues	<ul style="list-style-type: none"> • Reassign duties to advise the Superintendent and school board on environmental issues. • Loss of leadership and support in directing programs related to safety and environmental issues such as lock-out/tag-out, asbestos, right-to-know, U.S. Safe Water Drinking Act, confined space entry, and others. 	
School-Community Relations	<ul style="list-style-type: none"> • Loss of leadership and support interpreting the business affairs of the school district to the public by preparing materials for distribution, addressing and working with service clubs, the PTA and citizens committees, and through contacts with press, radio and television services. • Loss of leadership and support for providing the Superintendent and other staff members, as well as the School Board, with financial and budgetary information to help them in their relations with the public. 	

	<ul style="list-style-type: none"> • Reassign responsibilities for preparing election notices as prescribed by Wisconsin Statutes and assists candidates and incumbents in filing for office. • Reassign responsibilities for preparing Statement of the Board of Canvassers and Certificate of Determination of Persons Elected, guides election-canvassing process and assists the school board clerk. • Reassign responsibilities for preparing the Certification of Election and the Official Oath of School Board Member. 	
Communication	<ul style="list-style-type: none"> • Loss of uniform leadership for both internal and external communications regarding the business/personnel operation. • Loss of leadership and support in keeping the Superintendent of Schools appraised of the current status of business/personnel operations. 	
Transportation	<ul style="list-style-type: none"> • Loss of leadership for general oversight of transportation services and vision of future needs. • Reassign responsibility for contract negotiation of transportation services to other staff or attorney. • Reassign oversight of the preparation of all state reports regarding transportation issues. 	Increased cost TBD
Other Responsibilities	<ul style="list-style-type: none"> • Reassign responsibility for administering, on behalf of the School Board Clerk, the regular and special elections of Board members and bond referendum elections. • Appoint different staff member to attend School Board meetings to represent district interests in school business management. 	

D. HAVE SOME COMPONENTS OF POSITION REASSIGNED TO OTHER PERSONNEL

For this position analysis, the committee felt the information had been covered in section C. The assignment of the Assistant Superintendent Business/Personnel Services duties to other administrators in the district would limit the capabilities of those administrators for performing their assigned duties at the same levels of quality and service provided now and would be detrimental to the operations of the district. It is not recommended.

E. POSITION BE REDESIGNED

For this position analysis, the committee felt that the design of the position within the administrative structure is optimum, except that direct supervision of the Supervisor of Facilities position should be included. Altering the relationship of this position within the administrative structure is not recommended.

RECOMMENDATION: After examining the information presented, it is the recommendation of the administrative review committee that the position of Assistant Superintendent Business/Personnel Services should include the direct supervision of the Supervisor of Facilities and should otherwise remain unchanged.