

# Redesigning Human Resources for OUSD: Beyond FCMAT Recovery



State Administrator/Board Presentation  
April 13, 2005

# CONTEXT

***Although significant progress has been made in difficult circumstances, the HR Division must make substantial changes to reach and maintain an acceptable level of service within current funding***

## **FCMAT Report Highlights– September 2004**

- Unsatisfactory communication between units within the division
- While improving, there is a continued need for documentation and distribution of policies and procedures
- HR and Payroll are not well integrated resulting in accurate payments to employees
- Considerable need for training of employees and District staff

## **Redesign Diagnostic Highlights**

- Internal and external frustration with performance and HR
- Inefficient and unclear processes result in mistakes and poor customer service
- Lack of accountability for tasks results in internal and external “finger-pointing”
- Poor integration with Financial Services contributes to inefficiency

# SOLUTIONS

*Both the overall redesign of OUSD to support greater site-based decision-making and the requirements to improve consistent with FCMAT standards, require substantial integrated changes in five major areas*

- Structure**
- Technology**
- Processes**
- Training**
- Personnel**

*A comprehensive action plan to address all FCMAT Power Standards has been developed and will be incorporated into the redesign process*

# STRUCTURE – KEY ACTIONS

## Since September 2004

- Brief diagnostic on performance and strength/weaknesses of current org structure and roles within HR
- Redesigned Organization Structure for Fiscal 2005-06 based on best practices and past experience

## Next 3 Months

- Develop service-area goals and objectives
- Clarify internal and external roles and redefine processes within new structures
- Develop communications regarding new structures for all staff

## 3 -12 Months

- Transition organization toward new operating model
- Physical redesign of office space to improve communication of new teams

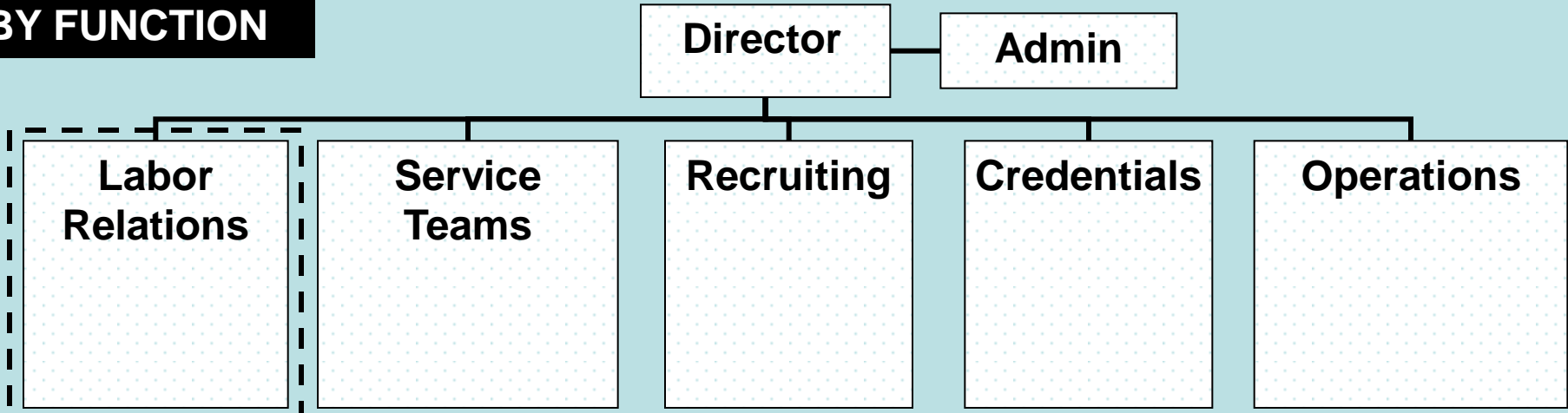
**FCMAT Power Standards Impacted**

**1.5**

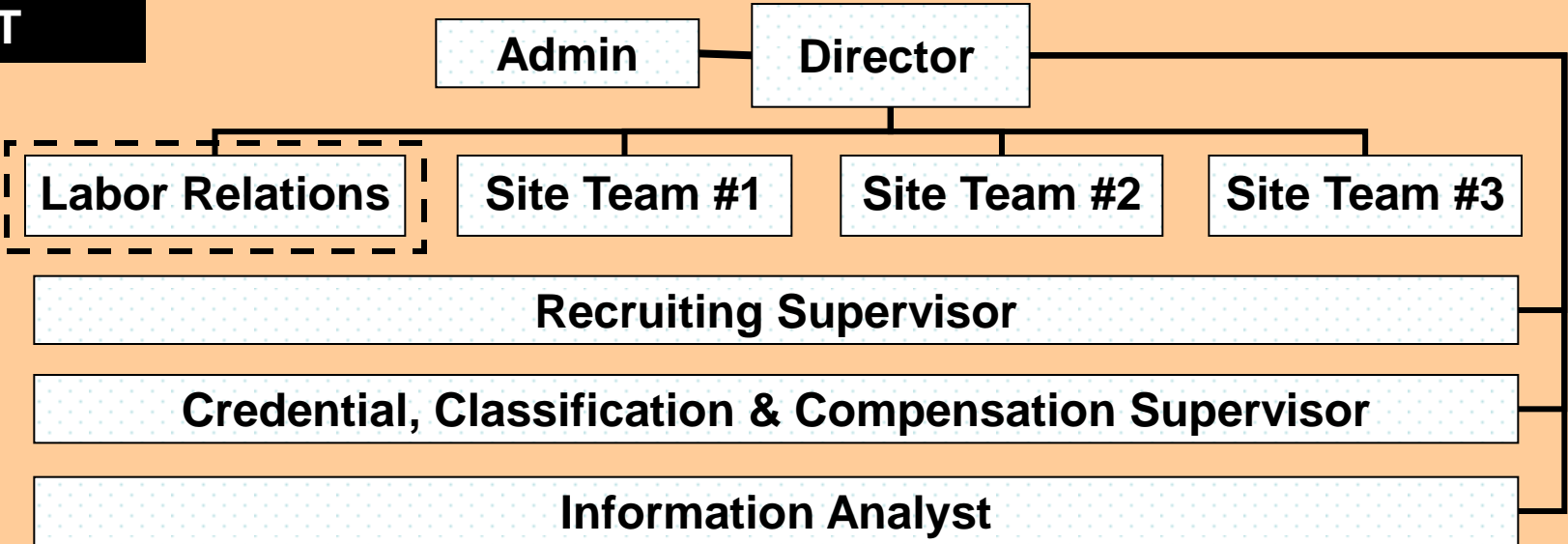
# HR WILL MOVE FROM A FUNCTION TO A CLIENT-BASED ORGANIZATION

[-] [-] | Unchanged

## BY FUNCTION



## BY CLIENT



# TECHNOLOGY – KEY ACTIONS

## Since September 2004

- Increasing use of HR website to provide information (menu of services, bargaining agreements, certificated FAQ, redesign info. and hiring)
- IFAS upgrades (seniority, credentials, position control)
- Online applications through edjoin.org
- RBB development has improved position control
- RBB training has included financial and HR analysts as a team
- IFAS training needs assessment and scheduling

## Next 3 Months

- OUSD intranet for HR (e.g. documents, data, questions)
- Expanded training on technology
- IFAS upgrades and detailed training
- Applicant Tracking for all positions
- Evaluation of benefits administration software

## 3 -12 Months

- Redesign contains significant budget increase for technology training
- Online HR discussion board
- Online, interactive FAQ for staff
- Webcenter and Subtracker for substitute placement and attendance

## FCMAT Power Standards Impacted

**2.2, 8.1, 8.4, 12.2**

# PROCESSES – KEY ACTIONS

## Since September 2004

- Draft HR annual calendar being reviewed
- Workflow of key processes documented for detailed review
- Organization charts by unit developed
- Weekly management team meetings with minutes provided broadly
- Formal plans/processes for recruitment, employee processing, developed
- RBB training and rollout coordinated between HR and Payroll, including budget development with principals

## Next 3 Months

- HR staff person dedicated to organizing existing documents into coherent procedures manual - Now
- Existing resources on HR intranet - May
- Bi-weekly one-on-ones with unit managers
- Bi-monthly division meetings/trainings

## 3 -12 Months

- Indexed, searchable procedures available on intranet
- Formal meeting structure to address interactions between payroll and HR
- Processes redesigned incorporating new technologies and best practices

## FCMAT Power Standards Impacted

**1.7, 2.5 3.7, 3.9, 5.2, 6.2, 6.3, 6.6, 8.1**

# TRAINING – KEY ACTIONS

## Since September 2004

- Significant internal training on variety of topics October – March (25+)
- Periodic training of District staff at network meetings and prior to recruiting/interviewing participation
- Evaluation implementation calendar provided to site administrators and online
- Integrated training with financial on RBB

## Redesign-related

- List of desired future trainings developed

## Next 3 Months

- Development of 2005-06 training calendar
- Orientation/training on OUSD intranet, applicant tracking software

## 3 -12 Months

- Job-specific training on most effective use of Microsoft Office
- Orientation/training on new version of IFAS (including new modules)
- Training on new FAQ software
- Development of online manuals for employees (e.g. FMLA, ADA, PAR)

**FCMAT Power Standards Impacted**

**4.2, 9.7, 10.1**



# PERSONNEL – KEY ACTIONS

## Since September 2004

- Job Description project to align, eliminate and ensure legal compliance of jobs
- Modified duty jobs/tasks have been developed for injured workers with help of Risk Management unit

## Redesign-related

- 7 new job descriptions for 22 jobs have been created with performance metrics included
- Job postings have received high interest in only 10 days (66 applications)

## Next 3 Months

- Hire internal/external candidates
- Complete transition plan for services provided including internal and external communications plan

## 3 -12 Months

- Train/Orient any new staff members
- Develop workplan for each Site Team with performance metrics
- Develop formal performance-tracking process and tools

**FCMAT Power Standards Impacted**

**1.6, 6.4, 7.6, 7.8, 13.2**

# NEXT STEPS

## **Stabilization**

- **Proposed Layoffs**
- **Involuntary Transfers**
- **Dependents' Audit**
- **Early Exit Retirement Program**
- **Internal Hiring**
- **Teacher Recruiting**

## **Technology Implementation**

- **IFAS**
- **Searchsoft**
- **Intranet**
- **Customer Service module**

## **Process Codification & Training**

- **Best practices review and integration**
- **Desk manuals & resource distribution**
- **Internal cross-training**
- **External trainings**

# **APPENDICES**

# APPENDIX - FCMAT POWER STANDARDS

1.5	Organization and Planning: The division has established goals and objectives directly related to the district's goals that are reviewed and updated annually.
1.6	Organization and Planning: Individual staff members have developed goals and objectives in their areas of responsibility and also a personal professional development plan.
1.7	Organization and Planning: the division has a monthly activities calendar and accompanying list of ongoing Human Resources activities to be reviewed by staff at planned meetings.
2.2	Communications (Internal/External): The Human Resources Division has developed and distributed a menu of services which includes the activities performed, the individual responsible, and the telephone numbers where they may be contacted.
2.5	Communications (Internal/External): The Human Resources Division holds regularly scheduled staff meetings.
3.7	Certificated Recruitment and Selection: A summary or evaluation of the results of the year's recruitment efforts is provided in written form.
3.9	Certificated Recruitment and Selection: The district systematically initiates and follows up on experience and reference checks on all applicants being considered for employment.
4.2	Classified Recruitment and Selection: employment procedures and practices are conducted in a manner that ensures equal employment opportunities. Written hiring procedures are provided. Education Code 44100-44105.
5.2	Employee Orientation: The Human Resources Division provides orientation handbooks for new employee orientation in all classifications: substitute, teachers, and classified employees.

## APPENDIX - FCMAT POWER STANDARDS (Cont.)

6.2	Operational Procedures: Human Resources Division non-management staff members have individual desk manuals for all of the personnel functions for which they are held responsible.
6.3	Operational Procedures: The Human Resources Division has an operations procedures manual for internal department use in order to establish consistent application of personnel actions.
6.4	Operational Procedures: The Human Resources Division has a process in place to systematically review and update job descriptions. These job descriptions should be in compliance with the Americans with Disabilities Act (ADA) requirements.
6.6	Operational Procedures: The Human Resources Division has procedures in place that allow for both personnel and payroll staff to meet regularly to solve problems that develop in the processing of new employees, classification changes, and employee promotions.
7.6	State and Federal Compliance: Duties to be performed by all persons in the classified service and other positions not requiring certification are fixed and prescribed by the governing board. Education Code 45109.
7.8	State and Federal Compliance: Current position descriptions are established for each type of work performed by certificated and classified employees. Education Code 35202.
7.12	State and Federal Compliance: The district is in compliance with the Family and Medical Leave Act (FMLA), including posting the proper notification.

## APPENDIX - FCMAT POWER STANDARDS (Cont.)

7.13	State and Federal Compliance: The district is in compliance with the Americans with Disabilities Act (ADA) of 1990 in application procedures, hiring, advancement or discharge, compensation, job training and other items, conditions and privileges of employment.
8.1	Use of Technology: An on-line position control system is utilized and is integrated with the payroll/financial systems.
8.4	Use of Technology: The Human Resources Division has in place a program of providing funds and time for staff training and skill development in the use of computers.
9.7	Staff Training: The division develops handbooks and materials for all training components.
10.1	Evaluation/Due Process Assistance: The Human Resources Division provides a process for the monitoring of employee evaluations and the accountability reporting of their completion.
12.2	Employer/Employee Relations: The Human Resources Division involves site-level administrators in the bargaining and labor relations decision-making process.
13.9	Employee Benefits/Workers' Compensation: The district's Workers' Compensation experiences and activities are reported periodically to the Superintendent's cabinet.
13.12	Employee Benefits/Workers' Compensation: The district has provided the third party administrator with a copy of all current job descriptions and updates them, if needed, quarterly.
13.13	Employee Benefits/Workers' Compensation: The Workers' Compensation: The Workers' Compensation Unit is actively involved in providing injured workers with an opportunity to participate in a modified duty program.