

# Office of Administration and Finance

## Finance, Human Resources, Operations and Administration

January 16, 2020  
School Committee



# Overview of Growth FY05 - FY20

	FY 2005	FY 2010	FY 2015	FY 2019	FY2020	Change FY05 - FY15	Change FY15 - FY20
PK-12 Enrollment	5,984	6,472	7,508	7,855	7,857	+1,524	+349
# of Employees (FTE)	868.3	938.3	1061.5	1277.8	1299.1	+193.2	+237.6
Operating Budget (General Fund)	\$55,828,665	\$72,072,892	\$90,630,150	\$110,756,679	\$119,841,548	+\$34,801,485	+\$29,211,398



# We're Still Trying to Grow into our Larger Self

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We want to be a place where our staff and colleagues are hired in a clear process, on-boarded effectively, and know how to access the resources and support they need to do their jobs well; a place where staff and colleagues are communicated with in a timely manner about that which affects their work lives; where they know who to turn to when they face challenges and trust that these challenges will be addressed.

We want to be a place where all staff understand the vision, priorities, and direction of their specific school, their specific department, and the entire district, and know how these priorities support and build on each other.

We want to be a community where staff can contribute to building and leading toward our vision as they choose; a learning community where we are all colleagues, working together to always improve the way we work, in service of our students, our families, and each other.



# PSB - Still Trying to Grow into Our Larger Self

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The Public Schools of Brookline does an extraordinary amount well.  
There are areas we can improve.

We don't yet have the well developed and well documented systems, procedures, and practices that we need to help our bigger schools and larger staff need to easily accomplish the work they need to do.

## Areas of Particular Challenge

- Budgeting, financial controls, and financial reporting
- Staffing, hiring, on-boarding, evaluation
- School scheduling
- Strategic planning, prioritization
- Internal communication particularly related to changes or new practices
- Integrated technology systems related to operations



# The Office of Administration & Finance

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## Finance



- Payroll
- Accounts Payable
- Budget
- Procurement
- Contract Management
- Revenue/Receipts
- Special Revenue Funds: Revolving funds (fee prog.), Grants, Gifts, Student Activities
- Support SC Finance Sub Committee

## Human Resources



- Hiring/Terminations
- Employee Contract Management (Non-Aligned & Collective Bargaining Contract Negotiations)
- Benefits
- Accruals/ Attendance
- Due diligence related to personnel matters
- Liaison Public Employee Committee (PEC)
- Support SC Negotiations Sub Committee

## Operations



- Food Service
- Transportation
- Building Services/ Maintenance
- Capital Improvement Planning
- Building Construction
- Liaison Boards/ Committees (Building Commission and Transportation Board in Deputy Supt Absence)
- Support SC Capital Sub Committee

## Administration



- Emergency Response Coordinator
- Records Access Officer for School Department (Public Records)
- Liaison to Municipal Departments (e.g. Recreation, Building, IT, DPW/Parks, Police, Fire)
- Liaison Boards/ Committees (Advisory, BFAC, Building Commission, Transportation Board)
- Support SC Policy Sub Committee

# Office of Administration and Finance (A&F)

Position Title	FY05	FY10	FY15	FY16	FY19	FY20	Net Change FY15-FY20	Net Change FY05-FY20
Deputy Superintendent's Office	2.00	2.00	2.00	2.00	2.00	2.00	0.00	0.00
Finance	4.00	2.00	3.00	2.00	3.00	3.00	0.00	-1.00
Human Resources	5.00	4.00	4.00	5.00	5.00	5.00	1.00	0.00
Transportation	4.70	3.00	2.00	2.00	1.94	2.00	0.00	-2.70
Operations and Facilities	49.78	42.33	41.43	44.43	40.00	45.37	3.94	-4.41
Food Service	29.60	29.49	33.34	33.34	33.80	34.07	0.73	4.47
<b>Total A&amp;F FTE</b>	<b>97.08</b>	<b>84.82</b>	<b>87.77</b>	<b>90.77</b>	<b>87.74</b>	<b>93.44</b>	<b>5.67</b>	<b>-3.64</b>



# Administration



- Emergency Response Coordinator
- Records Access Officer for School Department (Public Records)
- Liaison to Municipal Departments (e.g. Recreation, Building, IT, DPW/Parks, Police, Fire)
- Liaison Boards/ Committees (Advisory, BFAC, Building Commission, Transportation Board)
- Support SC Policy Sub Committee

## Primary Areas of Emphasis

- Capital & Facility Planning
- Safety & Security Planning (not fully updated since 2014)
- Financial Assistance (updated in 2018)
- Public Records Requests
- Work with SC, Town Boards and Commissions
  - Advisory Committee, Building Commission, BFAC, Transportation Board, etc.



# Capital Projects - Cumulative

Fiscal Year	Planning/Design/Construction	Lease Activity/Property Acquisitions/Moving
<b>FY 2016</b> <b>SY 2015-2016</b>	<ul style="list-style-type: none"> <li>● CCS final design and construction begins. Estimated Project completion <b>2021</b> (warranty work and MSBA audit)</li> <li>● Ongoing planning for 9th School and enrollment growth through <b>June 2018</b></li> <li>● MSBA Application High School <b>January 2016</b></li> <li>● Facility Inventory Master Plan begun <b>Spring 2016</b> and rightsizing schools</li> <li>● Site Study of Stop &amp; Shop, Baker, and Baldwin for 9th school site.</li> </ul>	<ul style="list-style-type: none"> <li>● Lease renewal for BEEP leases (11 classrooms, BACE - Korean Church, and opening 24 Webster Place, for 50 staff members from BHS and Town Hall. Planning for claiming 10 classrooms at BHS to handle incoming enrollment</li> <li>● 30 Webster Street Lease negotiations and operationalizing for Lower Coolidge Corner School begin.</li> <li>● Brookline Music School Lease Renewal</li> </ul>
<b>FY 2017</b> <b>SY 2016-2017</b>	<ul style="list-style-type: none"> <li>● 9th School at Baldwin Feasibility Study BHS design and planning through construction <b>2021</b>.</li> <li>● BEEP Building Donation on Harvard Street</li> </ul>	<ul style="list-style-type: none"> <li>● Acquiring 111 Cypress Street for BHS Expansion through <b>FY 2018</b></li> </ul>
<b>FY 2018</b> <b>SY 2017-2018</b>	<ul style="list-style-type: none"> <li>● Three School plan decided               <ul style="list-style-type: none"> <li>○ Baldwin selected for 9th School Facility Plan May 2018 - May <b>2019</b></li> <li>○ Driscoll selected for 9th School Facility Plan May 2018 - winter/Summer <b>2023</b></li> <li>○ Pierce MSBA Application Submitted</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Upper Devotion and Lower Devotion Begin Packing and Moving for August 2018 Move In</li> </ul>

Work overseen by Deputy of A&F with support from Dr. of Operations and Special Asst. for S&P



# Capital Projects - Cumulative

Fiscal Year	Planning/Design/Construction	Lease Activity/Property Acquisitions/Moving
<b>FY 2019</b> <b>SY 2018-2019</b>	<ul style="list-style-type: none"> <li>● 111 Cypress Cleaned Out for Demolition</li> <li>● Three School plan cont'd               <ul style="list-style-type: none"> <li>○ MSBA Application Pierce June 2018 through <b>2028</b></li> <li>○ Feasibility and Schematic Design processes for Baldwin and Driscoll</li> <li>○ Combined vote Baldwin &amp; New Driscoll does not pass</li> </ul> </li> <li>● Newbury College Assessment of existing building and future expansion</li> <li>● CCS Move In, Project On Schedule and On Budget!</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Close 30 Webster Street for Lower Coolidge Corner School</b></li> <li>● RFP for lease renewals Spring 2019 (negotiations and lease terminations)</li> <li>● Old Lincoln readied for BHS Expansion use through September 2021</li> </ul>
<b>FY 2020</b> <b>SY 2019-2020</b>	<ul style="list-style-type: none"> <li>● BHS Construction at 111 Cypress in Progress</li> <li>● BHS Demolition of Roberts Wing/ Construction Begins</li> <li>● Three School Plan continues, Adjust to Knowns/Voter Feedback               <ul style="list-style-type: none"> <li>○ New Driscoll, 4 Sections, Passes December 2020, Design Development Proceeds</li> <li>○ MSBA Pierce Application Proceeds, Awaiting enrollment Letter from MSBA Jan 2020</li> <li>○ 9th School Location TBD, 2 Section at OLD Lincoln to be explored</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● BHS Moves Into Old Lincoln</li> <li>● <b>Move out of 24 Webster Place for Admin Offices</b></li> <li>● Add lease 2 Clark Rd( 16 classrooms),</li> <li>● Moving Administrative Space.</li> <li>● SC Decisions               <ul style="list-style-type: none"> <li>○ Finalize New Leases/ Non Renewals</li> </ul> </li> </ul>

Work overseen by Deputy of A&F with support from Dr. of Operations and Special Asst. for S&P





# Financial Assistance

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September 2019 (703 Low Income Students)

To date 330 applications processed

- 8 students - 50%
- 51 students - 75%
- 250 students - free
- 21 students - Not Eligible

74 families still in process / undetermined

Minimum process time family with 2 kids at PSB: 30 min.



# Records Requests # and time

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Since Dec. 2018 - Jan. 2020 = 34 requests

- 10 business days to respond to request.
- If longer time is needed the requester needs to be notified of a max 15 business days extension (25 days total).
- For big requests a 25 business day extension can be requested from the State (50 days total).

Over **20,000 emails** reviewed before sharing those relevant to requests

**515 individual records** have been shared (reports, memo's, meeting minutes, presentation documents etc.)

This does not include Records Requests handled and managed by Town Counsel

On average spent 1.5 day a week on Public Records Requests in calendar 2019.

FOIA Direct link active since January 2020



# Finance



- Payroll
- Accounts Payable
- Budget
- Procurement
- Contract Management
- Revenue/Receipts
- Special Revenue Funds: Revolving funds (fee prog.), Grants, Gifts, Student Activities
- Support SC Finance Sub Committee

FTE: 3.00

## Systems Improvement

- Addressing Budget Growth
  - General Fund Operating increase (40% since 2015)
  - Established Gift Accounts
  - Grants (flat revenue or decreasing awards)
  - Revolving Funds created new funds as required
  - Instituting Student Activities regulatory changes (1997, 2005, 2020)
- Moving towards DESE Chart of Accounts that had not instituted required reporting changes (1993, 2001, 2005, 2015, & 2019)
- Reporting:
  - Greater transparency - eliminating reserves, including staffing lists, creating clearer budget book
  - Instituting DESE EOY Report & ClearGov sharing of comparative data
  - Improving budget clarity (Accessible, ClearGov sharing of comparative data, OpenGov - improving reporting, budget development and monitoring.

# Overview of Growth FY05 - FY20

	FY 2005	FY 2010	FY 2015	FY 2019	FY2020	Change FY05 - FY15	Change FY15 - FY20
# of Finance Employees (FTE)	4.00	2.00	3.00	3.00	3.00	-1.00	0.00
# of Employees (FTE)	868.3	938.3	1061.5	1277.8	1299.1	+193.2	+237.6
Operating Budget (General Fund)	\$55,828,665	\$72,072,892	\$90,630,150	\$110,756,679	\$119,841,548	+\$34,801,485	+\$29,211,398

# A&F - Finance

Position Title	FY05	FY10	FY15	FY16	FY19	FY20	Net Change FY05-FY20	Net Change FY15-FY20
Director of Administrative Services	1.00	---	1.00	1.00	---	---		
Budget Analyst	---	1.00	---	---	---	---		
Budget Analyst / AP Manager	---	---	---	---	1.00	1.00		
Budget Analyst / Payroll Manager (*unfunded until FY 19)	---	---	---	---	1.00	1.00		
Accounts Payable Clerk	1.00	1.00	1.00	1.00	1.00	1.00		
Payroll Office Clerk	1.00	---	---	---	---	---		
Administrative Assistant Payroll	1.00	---	1.00	---	---	---		
<b>Total FTE</b>	<b>4.00</b>	<b>2.00</b>	<b>3.00</b>	<b>2.00</b>	<b>3.00</b>	<b>3.00</b>		





# Human Resources



- Hiring/Terminations
- Employee Contract Management (Non-Aligned & Collective Bargaining Contract Negotiations)
- Benefits
- Employee & labor Relations
- Liaison Public Employee Committee (PEC )
- Support SC Negotiations Sub Committee
- Teacher Evaluation Management
- Absence and Substitute management

## Primary Areas of Emphasis

Specifically the HR department:

- Processes all hires and separations that occur in the District
- Manages HR technology including the applicant tracking system, MUNIS and TeachPoint (teacher evaluation system)
- Interprets the negotiated agreements and assists employees, managers, and supervisors with work related problems or concerns
- Interview, hires and assists with assignment of all substitutes, tutors, and interns in the District
- Conducts background checks (state and federal) on all new hires
- Manages leave requests and absences

# Overview of Growth FY05 - FY20

	FY 2005	FY 2010	FY 2015	FY 2019	FY2020	Change FY05 - FY15	Change FY15 - FY20
# of HR Employees (FTE)	5.00	4.00	4.00	5.00	5.00	-1.00	+1.00
# of Employees (FTE)	868.3	938.3	1061.5	1277.8	1299.1	+193.2	+237.6
Operating Budget (General Fund)	\$55,828,665	\$72,072,892	\$90,630,150	\$110,756,679	\$119,841,548	+\$34,801,485	+\$29,211,398



# A&F - Human Resources

Position Title	FY05	FY10	FY15	FY16	FY19	FY20	Net Change FY05-FY20	Net Change FY15-FY20
Human Resource Director	1.00	1.00	---	---	---	---		
Assistant Superintendent for Human Resources	---	---	1.00	---	---	---		
Director of Human Resources	---	---	---	1.00	1.00	1.00		
HR Secretaries	2.00	2.00	---	1.00	---	---		
Administrative Assistant - Human Resources	---	---	1.00	---	---	---		
Human Resources Manager	---	---	---	1.00	1.00	1.00		
Substitute Callers/ Coordinator	2.00	1.00	1.00	1.00	---	---		
Human Resources Generalist	---	---	---	---	2.00	2.00		
Human Resources Data Analyst	---	---	1.00	1.00	1.00	1.00		
<b>Total FTE</b>	<b>5.00</b>	<b>4.00</b>	<b>4.00</b>	<b>5.00</b>	<b>5.00</b>	<b>5.00</b>	<b>0.00</b>	<b>1.00</b>

## Operations/ Facilities



- Food Service,
- Transportation,
- Building Services/  
Maintenance
- Capital Improvement  
Planning
- Building Construction
- Liaison Boards/  
Committees (Building  
Commission and  
Transportation Board  
in Deputy Supt  
Absence)
- Support SC Capital  
Sub Committee

## Primary Areas of Emphasis

- Custodial Services
- Rental of Facilities
- Buildings under Construction
- Liaison with Public Building Division
- Food Service
- Transportation
- Employee Parking Plans

# A&F - Operations and Facilities

Position Title	FY05	FY10	FY15	FY16	FY19	FY20	Net Change FY05-FY20	Net Change FY15-FY20
Manager of Building Services	1.00	1.00	1.00	---	---	---		
Director of Operations and Facilities	---	---	---	1.00	1.00	1.00		
Supervisor of Custodians	1.00	1.00	1.00	1.00	1.00	1.00		
Project Manager Operations and Special Projects	---	---	---	---	1.00	1.00		
Building Scheduler/Fee Collector	---	---	1.00	1.00	1.00	1.00		
Administrative Assistant	0.50	---	---	---	---	---		
Custodians	47.28	40.33	37.93	40.93	35.00	40.37		
Courier	---	---	0.50	0.50	1.00	1.00		
<b>Total FTE</b>	<b>49.78</b>	<b>42.33</b>	<b>41.43</b>	<b>44.43</b>	<b>40.00</b>	<b>45.37</b>		



# Food Service

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A detailed presentation on Food Service will be scheduled to report on:

- Food Service Budget
- Meals Data
- Personnel and Services



# A&F - Food Service

Position Title	FY05	FY10	FY15	FY16	FY19	FY20	Net Change FY05-FY20	Net Change FY15-FY20
Director of Food Services	---	---	1.00	1.00	1.00	1.00		
Assistant Director of Food Services	---	---	1.00	1.00	1.00	1.00		
Administrative Assistant	2.00	1.00	---	---	0.50	---		
Secretary	1.00	1.00	1.00	1.00	1.00	1.00		
Kitchen Manager and Helpers	26.00	27.49	30.34	30.34	31.80	11.26		
Food Service Workers	---	---	---	---	---	23.13		
Courier	0.60	---	0.50	0.50	---	0.70		
<b>Total FTE</b>	<b>29.60</b>	<b>29.49</b>	<b>33.34</b>	<b>33.34</b>	<b>33.80</b>	<b>34.07</b>		





# FY21 Transportation Services





# MGL Chapter 71, Section 68

## Regular Education

“ ... If the distance between a child's residence and the school he is entitled to attend exceeds two miles and the nearest school bus stop is more than one mile from such residence, and the school committee declines to furnish transportation, the department, upon appeal of the parent or guardian of the child, may require the town to furnish transportation for children in grades kindergarten through six for a part or for all of the distance between said child's residence and the school...”

- <https://malegislature.gov/Laws/GeneralLaws/PartI/TitleXII/Chapter71/Section68>



# PSB School Committee Policy

1. State Law requires students transported who live greater than two mile from districted schools who are in grades K-6
  - a. **Brookline policy Specifies ½ mile closer than state's 2 mile distance from home to school for bus service**
2. Allows for fees to be charged for 7-12 transportation

<https://www.brookline.k12.ma.us/cms/lib/MA01907509/Centricity/Domain/66/20190213144706967.pdf>



# Transportation Services

- Special Education Transportation
  - 28 Vans to OOD Placements for 46 students
  - 14 Vans to In-District Programs for 60 students
- Elementary Transportation
  - 4 Buses serving 204 assigned students
  - Transport to language based programs
- BHS South Brookline Bus Service
  - For BHS Students in Baker, Baker/Heath, Baker/Heath/Lincoln Zones
    - FY19 Registered Riders - 145
    - FY20 Registered Riders - 141
  - 2 Buses and 3 AM trips and 4 PM trips daily

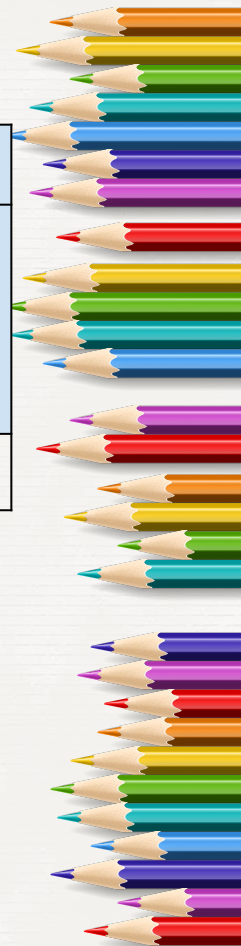


# Transportation Services

- METCO Transportation
  - State funded program. 3 Buses serve 132 students
- Vocational/Technical Schools
  - State Mandate. 0-1 van the last 3 years
- McKinney Vento (Homeless Student) Transportation
  - Federal Mandate, until more permanent housing secured
  - Varies from 0-4 students the last 3 years
- Foster Care Transportation
  - State Mandate. 0-2 students last 3 years, rare for PSB

# A&F - Transportation

Position Title	FY05	FY10	FY15	FY16	FY19	FY20	Net Change FY05-FY20	Net Change FY15-FY20
Transportation Coordinator	1.00	1.00	1.00	1.00	1.00	1.00		
Bus Monitors	3.20	2.00	1.00	1.00	0.94	1.00		
Secretaries	0.50	---	---	---	---	---		
<b>Total FTE</b>	<b>4.70</b>	<b>3.00</b>	<b>2.00</b>	<b>2.00</b>	<b>1.94</b>	<b>2.00</b>	<b>-2.70</b>	<b>0.00</b>



# Primary Challenge - Office of Administration & Finance

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Presently, most everything that happens outside of student instruction comes through or is the responsibility of **Administration & Finance**.

A&F has to handle it, or coordinate/connect with other school staff or municipal departments so the matter can be taken care of in as timely a manner as possible.

