

2022-2025 Superintendent Goals Article #4

Goal 4: Fiscal & Human Resources Management – Facilitate systems and implement actions/projects that ensure fiscal responsibility and positive collaboration with labor partners in order to maintain the resources necessary to create high quality learning environments.

Background, Description, and Rationale for Goal 4:

Schools are in the people business. The major objective of a school district is to provide quality learning and development experiences for children, but this objective is accomplished by hundreds of individual people who make up a school district. In any school district approximately 80% to 85% of the school budget is allocated to the salary and benefits of its employees. In SUSD this totals approximately \$101,097,123 annually and includes approximately 1,350 people (teachers, classified staff, and administrators). The facilitation of activities to support those staff, effective management of school district funds to provide those staff, and all of the other elements necessary to host school daily are essential to the success of a district. In SUSD, we take the areas of Human Resources and Fiscal Management seriously. We monitor our actions in these areas regularly and we work collaboratively to ensure that we can maximize these resources to support our students and their achievement.

Regular fiscal management includes the typical actions of accounting, budgeting, payroll, and purchasing, while regular human resources management includes the hiring, supervising, and supporting of its employees. But there are additional elements needed in operating schools that are also important. In school finance we must include facilities management, information technology management, food services management, and transportation management, while in school human resources management we must include the development of positive collaborative relationships to maintain a strong effective workforce. Strong fiscal management includes ensuring that standards of operation exist for every aspect of the organization to maximize its spending and minimize its waste. Strong human resources management includes developing strong trusting relationships with our labor partners and individual employees to ensure that employees are supported in their daily tasks of educating children. The members of the SUSD Cabinet work closely with their respective department heads to ensure that all of the services needed for students are provided, that all of the needs of staff and our facilities are met, and that we do this according to the varying laws and budget constraints that influence public education.

Because our human resources and our financial resources are essential to providing a quality educational experience for our student, SUSD makes these areas an annual goal. We believe that it is by attending to these two areas that we can ensure all of the educational and social emotional needs of our students are met on each of our 15 school campuses.

Projects or Actions for Goal 4:

Project A: Continue to implement principles of positive labor collaboration through the Labor Management Initiative (LMI) and expand activities to include more team members in the solution focused, student-centered approach to challenges faced within the organization.

The Labor Management Initiative (LMI) is a collaboration amongst a variety of public education entities to support public school districts and their labor organizations to have effective and productive student-centered relationships (https://cdefoundation.org/cde_programs/clmi/). SUSD has participated in the work associated with LMI since 2019. It provided district leaders and union leaders with many tools for effective collaboration and problem-solving strategies that were essential during the height of the COVID pandemic. As part of our commitment to LMI, we work together on student-centered solutions that have the greatest impact for students while maintaining appropriate working conditions for staff. This collaboration does not mean agreement on every issue, but the principles included in LMI ensure that District Leadership and Labor Partner Leadership are each focused on our primary objective – the education of students.

Implementing these principles ensures that all voices are heard during a crisis and that problems are addressed by focusing on solutions rather than sides. We use the knowledge and experiences of all members of our LMI team collaboratively and collectively. It is not a management or labor solution, it is a collective solution that maintains the district (teachers, classified staff, and management) meeting the needs of our students, while we also meet the needs of the employees that

carry out those services. It is a process that uses the knowledge and the experiences of every member of the team to resolve and issue rather than looking to a single group or individual to resolve a problem.

We began our learning of the LMI strategies during the start of the pandemic and our ability to expand this work into all facets of the organization has been limited by the constraints of the pandemic. Now that we are “back to normal” we see more efforts being made by the organization to enlist more members of our teams in this philosophy and experiences. For example, we are creating site level “meet and confer” activities to allow more direct solutions to be achieved when issues arrive. The schedules of these types of activities as well as various staff surveys will help us measure the impact of these efforts.

We appreciate the support and participation of our labor partners (STA and CSEA) in these efforts. Together we really do achieve more!

Project B: Revise and refine the District’s Facilities Master Plan tool to reflect current District needs, current facility demands to meet changes in program, and to maintain quality learning environments into the future.

In 2016, SUSD created a master facility plan to ensure that the various needs of each campus could be met. During the last four years district staff have diligently worked to complete many of the original projects that were needed in 2016, but as with any aging facility the needs of our schools continue to evolve. We currently must address the needs for California’s new Universal Transitional Kindergarten (UTK) program, while we also attend to the infrastructure needs of our facilities that are approaching or over 50 years old.

Rather than creating a single document that is quickly outdated, our facilities staff and our Assistant Superintendent of Business are working together to refine what has been a static document into a “living” list of projects that can be planned for, adjusted based on funding availability, or quickly adjusted based on district needs. For example, security measures may need to be revised, or have been revised, based on current recommendations from first responders or from school campus threat assessment tools. Having a “living” plan allows district leadership to respond to our facilities needs based on real-time data and for current needs.

The revision of the District Facilities Master Plan document will include a variety of stakeholders and take into consideration some of the safety and security needs that the District must address. For example, this planning will include the refinement of our single point of entry systems at each of the 15 school sites to allow for appropriate planning and execution of those plans into the future. This plan will also include some of the steps needed to meet the seismic needs of some of our facilities as well as general maintenance of each campus.

Ongoing planning is the key to successfully maintain the physical plant of our 16 elementary schools. By creating a dynamic planning system, we ensure that funds needed to address maintenance are set aside, but it also will allow the district to plan for and address larger scale projects that may require additional funding sources. By creating a dynamic and on-going planning tool SUSD hopes to ensure that its community is always fully aware of its on-going facilities needs. We know that school facilities need regular attention to be positive environments for learning and to be positive contributors to a neighborhood or community.

We look forward to beginning meetings with appropriate community representatives, experts in the area of school facilities, and school staff to create a timeline for the completion of this facilities tool. We further hope that our new facilities planning guide will be completed by the end of the 2022-2023 school year. We know that this new plan will be dynamic and on-going, but we want to continue sharing our facilities work with our community so they are fully aware of the improvements made as well as the needs that continue.

Project C: Revise and refine the District’s Educational Specifications tool to reflect current program/instructional needs, current facility demands to meet changes in program, and to maintain quality learning environments into the future.

In 2015, the district team (i.e., Governing Board members, District Office department leadership, classified representatives and certificated representatives from various district regions, CSEA and STA leadership, etc.) created a document to use as a standard for creating school environments that are equitable from site to site and that ensure the minimum standard expected by the community for the school facilities within Saugus Union School District. Many things have changed since

2015. We have learned to do many things differently since these specifications were created. We must evolve with the times if we are to ensure that we are meeting the changing needs of our students and our community.

The Educational Specifications tool includes guiding principles that describe how school environments (interior and exterior) will function and feel to the students and staff who use them. These guiding principles provide a foundation and consistency as changes are made to existing campuses and new campuses are envisioned. The Education Specifications document also provides the district with design guidelines to ensure that various components of an individual campus meet the function needs of teaching and learning, meet the safety needs for today's schools, allow for flexibility and adaptability of uses for spaces, allow for buildings to be sustainable and limit their impact on the environment, but are most importantly student-centered spaces that allow high quality learning experiences.

We look forward to examining the current specifications in relation to our needs and refining them to ensure they serve as a guide point for future remodeling projects, future facilities development, and for maintaining a quality standard of our core facilities structures at each of our 15 schools.

Later this fall, committees will be established and begin meeting to review the current specifications and then revise or enhance those specifications as needed. These committees will include a variety of educational partners (i.e., parents, administrators, teachers, classified staff, and specialized educational staff) and they will meet in large and small groups to ensure that the needs of specific spaces are appropriately addressed (e.g., SPED staff will meet on specifics for SPED spaces). We look forward to having these specifications completed by the end of winter to allow them to support the revisions of the District's Master Plan for Facilities.

2018-2022 Fiscal & Human Resources Achievements in SUSD

- Completed a classified employees job study to ensure that existing classified staff positions have updated appropriate job descriptions, that classifications of various positions were appropriate to job descriptions and industry standards, and created a new salary schedule where increments between years of experience and/or job classification are standard and competitive with similar non-school related positions.
- Revised District LCAP creation and revision process to include more community partners information, align budget amounts to needs in each goal, and ensure that funds are principally directed to the unduplicated pupils across the district
- Initiated and committed to development of a collaborative, student-centered, solution-focused organization by participating in the work of the Labor Management Initiative (LMI). This helped the District leadership and our labor partner leadership to collaborate productively to meet organizational needs for students.
- Successfully navigated numerous memorandums of understanding throughout March 2020 to June 2022, to address the impacts of COVID pandemic on the operation of schools and its impact on employees
- Used creative strategies to address deficit spending issues in 2018 by implementing a SERP for employees, to address crippling impact of COVID on the CDP program by reimagining it following a temporary closure, and to address potential teacher lay-offs by creating Teacher-on-Special-Assignment positions to maintain staff and support student learning needs
- Completed a new classroom building & science lab at Plum Canyon Elementary School, completed a new Multi-purpose room at Cedar creek Elementary School, and completed numerous painting, flooring, air conditioning, lighting, playground structures, etc. across all 16 campuses (\$114,707,341 Total Facilities Funds from July, 2018 – present; \$73,874,859 of funds expended is from Measure EE; reminder of expenses are from Fund 40 Facilities or Community Facilities District (CFD) funds).

2018-2022 Awards and Recognition Received by SUSD for Fiscal & Human Resources

- Staff invited to be panelists at the Labor Management Initiative (LMI) annual conference June 2022
- Dr. Stevenson, Assistant Superintendent of Human Resources, received SCV ACSA award for Administrator of the Year for 2017-2018 and 2019-2020.
- Mr. Heinlein, Assistant Superintendent of Business Services, received SCV ACSA award for Administrator of the Year for 2018.
- Mr. Heinlein presented at the California Association of School Business Officials (CASBO) conference in 2022.