

Looking Within To Improve Office Organization

By Matthew J. Malinowski, RSBA



When tough economic times set in, school business administrators heighten their normal zeal in finding ways to reduce costs and improve efficiency. Our district recently underwent a yearlong internal self-analysis to examine and determine the proper staffing levels for the administrative functions within the school district's central office.

We approached the project with a detailed internal examination of all job functions, work processes, and the ebb and flow of peak workload levels. The process included input from administrators, support staff, and building-level personnel regarding appropriate workload distribution and staffing levels.

We conducted individual interviews with each member of the central-office support staff and then obtained

input from each staff member's supervisor. We then reviewed each support staff member's current job description. In many cases, the job descriptions did not accurately represent work assignments. As the volume of work grew and functions within the central office expanded, administrators assigned additional duties with no consideration of what made "sense" for someone to do. Often, two people worked on the same tasks, resulting in duplicated efforts.

We considered the following questions when reviewing job duties and talking with support staff about their responsibilities:

- What major projects/areas are overseen?
- What are nuisance/nonsensical tasks?
- What inhibits productivity?
- What can be done mechanically?

Table 1. Job Responsibility Matrix for Central Office Staff

	Supt. Secretary	Personnel Secretary	Asst. Supt. for Curriculum Secretary	Asst. Supt. for Business Secretary	Director of Pupil Services/ Special Ed. Secretary	Business Coordinator	Bookkeeper/Tax Clerk	Transportation/Child Accounting Secretary
Accounting functions						X	X	
Accounts payable							X	
Accounts receivable						X		
Act 48 (Continuing Education)			X					
Activity funds							X	
Bank reconciliation						X		
Benefits		X						
Budget book clerical support				X				
Capital project fund							X	
Census							X	
Certification	X							
Child accounting					X			X
Curriculum room			X					
Entering of requisitions							X	

- Are there any stopping points in the flow of work, such as having to wait for action from another department?

The results of these interviews yielded a matrix that we then reviewed to determine duplication of efforts and appropriate changes in job responsibilities (see Table 1).

At the same time, we surveyed comparable school districts within our geographic area, obtaining data that allowed us to examine staffing levels, job duties, and other organization-specific needs to ensure efficiency.

At the end of our review process, we presented our new staffing plan to our administrative team and school board. The board approved the entire final document, which included the following sections:

- Overview
- Summary of current structure
- Evaluation of current structure
- Proposed staff assignment changes
- Proposed office environment changes (i.e., upgraded phones, copiers, movement to a quieter location)

After its approval, we set about implementing the plan.

Successful Implementation

Communication is an important part of successful implementation. In addition to staff meetings, we held one-on-one meetings, small group meetings, and informal information-gathering and discussion sessions in the form of unstructured conversations with employees. Informal discussions can improve communication and enable concerns by both management and employees to be addressed and rectified in a nonconfrontational manner.

We approached the evaluation part of this process with formalized reviews, assessments, and an analysis of the results. Based on the results, we adjusted workloads and took steps to improve efficiency, including automating certain processes.

Overall, the process serves as a useful “do-it-yourself” model for school business officials seeking to thoroughly examine their district’s school business operation from the ground up.

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