

DATE: January 23, 2018

TO: Board of Trustees

FROM: Darrel Robertson, Superintendent of Schools

SUBJECT: Third Party Panel Study of Operational Services of School Jurisdictions

ORIGINATOR: Todd Burnstad, Chief Financial Officer

RESOURCE STAFF: Angela Anderson, Janice Aubry, Stephanie Galba, Brenda Gummer, Sanaa El-Hassany, Terry Korte, Darwin Martin, Lorne Parker, Natalie Prytuluk, Mark Strembicki, Chris Wright

REFERENCE: [June 6, 2017 Board Meeting \(Trustee Gibson\): Shared Approach to Curriculum Implementation \(Response to Request for Information #218\)](#)

ISSUE

At the June 6, 2017 Board meeting, Trustee Michael Janz submitted a recommendation report for Edmonton Public Schools (Attachment I) to initiate a third party panel to study efficiencies in operational services of school jurisdictions across the province in all education spending to ensure that resources provided to the classroom are maximized and front line staff are protected.

This initiative was delegated to the Audit Committee Chair for discussion at the November 24, 2017 Audit Committee. A previous version of this report was prepared and circulated prior to the November Audit Committee meeting, however, due to a shortage of time, the report was deferred to the January 23, 2018 Board meeting. Information in this report has now been updated to include current events.

BACKGROUND

For purposes of this discussion, the following information includes: efficiencies that have been initiated during the 2016-2017 school year; efficiencies/opportunities currently being investigated; as well as future planned initiatives/opportunities.

1. Edmonton Student Transportation Authority (ESTA)

On February 12, 2013, Trustees approved the following motion: That Edmonton Public Schools carry out a feasibility study in conjunction with Edmonton Catholic Schools on a joint transportation plan that would improve efficiency, reduce ride times and reduce costs for both districts. This study should be complete by January 31, 2014.

Following the February 2013 motion, administrations in both jurisdictions collaborated to review the feasibility of a joint student transportation system. On March 18, 2014, administration reported to Trustees on the results of the Edmonton Student Transportation Consortium Model Feasibility Study. The study showed that an Edmonton student transportation consortium was feasible and that financial savings and operational improvements could be achieved through the creation of a student transportation consortium model. The following motion was approved at the March 18,

2014 Board meeting: That the Edmonton Public School Board and Edmonton Catholic School District enter into an Agreement in Principle and initiate Phase I of detailed design and implementation, as referenced in the Feasibility Study.

Following the detailed design effort, senior administration from Edmonton Public Schools and Edmonton Catholic Schools are exploring the potential creation of the Edmonton Student Transportation Authority (ESTA).

2. School Technologies Equity Project Initiative (2016-2018)

In conjunction with the fall 2016-2017 budget, the Board approved a multi-year Core Technology Enterprise Management plan. A summary of this plan including cost savings has been included as Attachment II.

3. Participation Under Government of Alberta Standing Offer Agreements (2016-2017)

For many years, the Government of Alberta (GoA) has included provisions in their government-wide standing offer and blanket contracts for a variety of goods and services to allow other Alberta Municipalities, Academic, Schools and Hospitals (MASH) sector entities to 'piggy-back' off of their contracts.

Edmonton Public Schools has used this program for the following:

- Cell phones
- Office supplies
- Task chairs
- BMO District Credit Card Program

4. Association of School Business Officials of Alberta (ASBOA) Information Reporting Committee (2017-2018)

Members of the ASBOA are management oriented and serve in the corporate, financial and business services areas in the K-12 public education system of Alberta and Northwest Territories. The Association is structured in four geographic zones which provide representation to the governing body. Membership in the Association is held by the individual and is on a voluntary basis.

ASBOA's vision is to be responsive to members' needs in a rapidly changing global community, providing leadership and innovation in business process and practices in School Business Management.

Starting in the fall of 2017, Madonna Proulx, Managing Director of Finance, was elected as a member of ASBOA's Internal Reporting Committee (IRC). In this role, Ms. Proulx's goal is to collaboratively share insight, experience, and expertise with Alberta Education to help create business efficiencies across school jurisdictions.

5. Proposed District School Supplies Pilot (2017-2018)

The goal was to reduce the school supply cost to parents (through bulk purchase power) and to standardize the supply list so that Student X in Grade Y at School Z has the same supply list as if they attended School Q. Additional information has been included on Attachment III. Through the course of this work, it was identified that consensus on a standard supply list could not be reached given the diverse needs of each school and the community they support. Although this initiative will

not be moving forward for the time being, it has been included in this report to highlight some of the initiatives that were considered in order to create efficiencies or cost savings.

6. Infrastructure and Technology Supports (2017-2018)

The District is exploring opportunities to provide infrastructure and technology support to other Alberta school jurisdictions. Currently, the District is already providing capital planning support for a regional school district and is in the process of discussing capital planning and project management supports for another district.

District infrastructure staff will continue to explore other opportunities to provide regional support. This initiative has the potential to expand quickly as Edmonton Public Schools already has the requisite expertise well established. Depending on level of demand, the District may be required to expand staff capacity, in the process strengthening the District's expertise.

7. Proposed Electronic Payments at Schools (2018-2019)

The goal is to significantly reduce the amount of physical cash being collected and deposited by schools. Schools currently collect cash and cheques for school fees, transportation fees, etc. (school generated funds). As these funds have to be physically taken to a bank for deposit, many schools have established bank accounts at a bank located near their school.

In order to streamline this process, the District has created an online fee management tool. This tool has the ability to allow parents to make payments on-line through a third party. Some of the larger schools have been using this tool and have reported considerable time savings. There are also benefits from an internal control point of view by not having to accept and process cash transactions. The largest drawback for smaller schools is the transaction fees charged by the third party debit and credit card payment processing vendors.

By entering into a District agreement with a third party vendor, we anticipate being able to significantly reduce the transaction fees. As schools move to accepting payments through this process, we can then consider transitioning schools to a single commercial bank, where we would then be able to negotiate lower bank service fees for the entire District.

The District is currently in the process of finalizing the Request for Proposal (RFP) for a third party vendor.

8. Leadership Development

In the 2017-2018 school year, the District received a grant to lead two projects for College of Alberta School Superintendents (CASS). One is a review of leadership development programs and initiatives in school jurisdictions across the province. The focus is on programs that support staff that possess a teaching certificate and aspire to or are currently in leadership positions at the school or system level. The second project consists of a literature review of best practices in leadership development. Work continues on these two projects. The final project reports will be shared at the CASS conference in March. This work is expected to identify opportunities for increased collaborative work relating to leadership development.

9. Online T4s

As a result of changing federal legislation and the increasing user friendliness of PeopleSoft, as of January 1, 2018, instead of requiring employees to opt in to access T4s online, they will now opt out

if they do not wish to receive their T4 online. This will result in employees receiving their T4 earlier and will save printing, postage and labour costs involved in distributing paper copies of T4s.

10. PeopleSoft Strategic Roadmap

A review of the PeopleSoft Human Capital Management (HCM) product concluded that it is not supporting the current and anticipated future day-to-day work needs of the Human Resources team, the accurate/timely flow of information required for end-to-end business processes within Central decision units, or Enterprise Resource Planning (ERP).

A Three Year Strategic Roadmap for PeopleSoft HCM was developed out of stakeholder conversations, identifying 55 projects to improve the use of system functionalities and maximize the return on investment in the coming years. In June 2017, approval was received to move forward on this Roadmap. This work will ensure the District is better accessing existing capacity in PeopleSoft, enable more efficient processes, support an enterprise approach to core District systems and ensure that the District's Human Resource Information System can support the current and future needs.

11. Staffing Processes

The staffing team is migrating the paper intensive processes used for continuing contract recommendations and other staffing processes to Google Share. This will save on printing and distribution costs and is creating efficiencies and saving time for schools. As the PeopleSoft roadmap work continues there will be further opportunities for streamlining some of these processes.

12. Edmonton Regional Collaborative Service Delivery (ERCSD)

ERCSD delivers services that were previously coordinated under Edmonton Student Health Integrated Program (ESHIP), Children and Youth with Complex Needs (CYCN) and Edmonton Regional Education Consulting Services (ERECS/Inclusive Learning Outreach). Throughout the 2016-2017 school year, Inclusive Learning in partnership with ERSCD, coordinated an enhanced delivery of services and supports to students, families and school staff within their schools. In particular, Inclusive Learning consultants in the areas of Low Vision/Blindness/Braille, Deaf and Hard of Hearing, Psychology, Physical Therapy, Adapted Physical Education and Assistive Technology for Learning provided services to students, families and staff in both the private and charter schools within the Edmonton region. This support continues throughout the present school year.

Formal professional learning sessions for Edmonton region consultant staff were also shared amongst public, private and charter schools within the ERCSD partnership and the District was a frequent host of these learning events. The District also regularly shares work space with our ERSCD partners in order to facilitate collaborative and more efficient services to students, schools and families. These initiatives continue within this present school year.

13. Child, Adolescent and Family Mental Health (CASA)

The District partners with CASA by providing teaching staff for their Mental Health Classrooms/Programs. Students from public, private and charter schools in and around the Edmonton region are eligible to attend.

14. Common Approach: Collaborative Service Delivery for Preschoolers with Severe Disabilities
Human Services Family Support for Children with Disabilities (FSCD) and Edmonton Public Schools Specialized Services work together to provide integrated programming for Pre-Kindergarten and Kindergarten children with severe disabilities and their families. Parents are valued members of a team that includes professionals working together to provide streamlined and integrated services in response to the changing needs and circumstances of children accessing Program Unit Funding (PUF) and their families. Specialized Services teams are located at Scott Robertson and Waverley Pre-Kindergarten sites. Contracts for each location are renewed annually through FSCD to continue this partnership in providing intensive support for eligible children and families in Early Years programs.
15. The Provision of Instructional Support Services to Alberta Education, School Jurisdictions and Organizations
Many District departments annually provide supports to Alberta Education, school jurisdictions and organizations, either through partnership agreements, informal collaboration, enabling access to professional learning services and events or contracted services. Examples of this include:
- Contracted services to Alberta Education for curriculum and resource development for provincial use.
 - Contracted services to regional learning consortia for workshop presentations and resource development.
 - Collaborative development and/or use of resources such as the Math Intervention Programming Instrument (MIPI) and Highest Level of Achievement Tests (HLAT) with other school jurisdictions.
 - District professional learning events (conferences, in-service sessions, etc.) are accessed by other school jurisdictions.
16. A Shared Approach to Curriculum Implementation
At the June 6, 2017 Board meeting, Response to Request for Information #218: A Shared Approach to Curriculum Implementation was provided. This report contained information regarding the possibility for any efficiencies and savings that could be gained from collaborating with other school jurisdictions. There are many efficiencies that could be gained over a multi-year implementation period and through collaboration with other school jurisdictions, via:
- The sharing and collaborative development of resources, including print, digital and multimedia resources through the Curriculum Development and Management Application, which should result in:
 - financial savings to jurisdictions
 - strengthening of field expertise across the province
 - increased consistency and depth of implementation.
 - The building of social capital, where jurisdictions could develop closer relationships, and strengthen and share expertise to support change and to improve teaching and learning. For example, as new staff join jurisdictions in the future, curricular expertise must be available (in digital learning formats combined with consultant, teacher leader and principal support) in job-embedded models, and reliance on large-scale and often costly external professional development services should lessen.
 - The development of systems that enable collaboration to reduce redundancies, such as systems that support:
 - the pooling of professional learning tools and opportunities
 - the sharing of or collaborative development of resources

- collaboration and the easy identification of multi-jurisdiction needs, such as resource licensing, the sharing of teacher and leadership expertise, etc.

17. Student Assessment Collaborative Resource Development

The District Student Assessment team engages collaboratively with jurisdictions across Alberta on an ongoing basis to develop and share assessment resources for mathematics and writing.

- MIPI assessments are currently shared, in PDF and Google Forms, along with administration support documents with 40 jurisdictions across Alberta via a Google Share site. Communication is organized through a key contact at each jurisdiction. This allows for ongoing support for administration in each jurisdiction and reciprocally for the sharing of feedback to our District that is used to inform further improvements of the assessments. Some jurisdictions worked alongside Edmonton Public Schools staff in early refining of the assessments and some external jurisdictions continue to be involved in person by attending the general information session in the fall or requesting an individual information session.
- HLAT development process involves jurisdictions across Alberta at different stages and to different degrees. The jurisdictions involved vary from year to year with some continuity and some new involvement. The HLAT prompt is shared with and administered by each of the participating jurisdictions. The resulting writing samples are collected and used to create the HLAT resource. Teachers from each jurisdiction are invited to participate in standards setting during the exemplar selection and rationale writing. These materials comprise a large part of the HLAT resource, which is released annually in spring and shared with the participating jurisdictions.

18. Research

- In collaboration with Leadership Development, the research team wrote a full report for the CASS that develops a literature review and environmental scan of international leadership development programs for school superintendents. This will provide an evidence-based resource for all jurisdictions across Alberta to consider how they can intentionally develop system leaders in terms of professional standards.
- Potential research project collaborations between the Aurora Academic Charter School, the University of Alberta, and Simon Fraser University, and funded through the Canadian Institutes of Health Research and the Social Science and Humanities Research Council.
- Working with the Aurora Academic Charter School in partnership with University of Alberta and Simon Fraser University, as well as the University of Alberta's Educational Psychology Department, for research proposal submission for the Alberta Research Network.

CURRENT SITUATION

In September 2017, the District became aware of the following Provincial Brokering Model Initiative:

Alberta Education is currently developing a business case to explore options for establishing a Provincial Brokering Model for the procurement of select goods and services, in order to reduce costs and administrative duplication of effort and increase equity among all school authorities (Public, Separate, Francophone, Charter, Private, and First Nations).

Alberta Education has invited ASBOA to provide representation on an advisory committee. The advisory committee will be chaired by Alberta Education with ASBOA taking on the role of Chair for the External Working Group. ASBOA has had several conversations with Alberta Education to clarify the deliverables and are very pleased to be able to work with them on this project.

The External Working group will be made up of representatives from:

- ASBOA
- Alberta Technology Leaders in Education (ATLE)
- Association of Independent Schools and Colleges in Alberta (AISCA)
- CASS

Edmonton Public Schools has an active role in this working committee with Todd Burnstad, CFO, being nominated as the representative for CASS.

The working committee is currently drafting a recommendation report that will be forwarded to the Province detailing what they believe is the most cost efficient and viable solution.

KEY POINTS

As noted above, Edmonton Public Schools has already started collaborating with other jurisdictions, organizations and working committees to not only maximize Provincial education funds, but to also create efficiencies. Sometimes these efficiencies result in cost savings and other times they result in being able to provide better supports and services for all students in the Province.

ATTACHMENTS and APPENDICES

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| ATTACHMENT I | Board Report - Motion re: Third Party Panel Study of Operation Services of School Jurisdictions |
| ATTACHMENT II | School Technologies Equity Project Initiative |
| ATTACHMENT III | Proposed District School Supplies Pilot |

TB:ja

DATE: June 6, 2017

TO: Board of Trustees

FROM: Trustee Michael Janz

SUBJECT: Motion re: Third Party Panel Study of Operational Services of School Jurisdictions

REFERENCE: [Trustees' Handbook – Section 5.2.2 – Notices of Motion](#)

ISSUE

Notice of motion was served at the May 23, 2017, Board meeting.

BACKGROUND

The recommendation contemplates convening a blue ribbon panel with third party input of education and business experts to study efficiencies in operational services of school jurisdictions across the province in all educational spending to ensure that resources provided to the classroom are maximized and front line staff are protected.

The costs identified with this initiative would be covered by the board initiative fund and an initial estimate is \$10,000.

Rationale:

Education is the second largest provincial expenditure next to health care. The majority of that funding is allocated to 61 different school boards overlapping across Alberta. This motion provides an opportunity for our board to reaffirm the message to the provincial government and all other school jurisdictions that we are open for business and we are looking to collaborate.

The first step would be studying the issue—let's find ways to save money and bring experts together to shake the collective school piggy bank. If we can pool resources together to increase our purchasing power and find efficiencies in operational services, we could not only save money but improve the educational experience for our students.

The second step would depend on the outcomes highlighted in the report, but it could involve greater partnerships between school districts, one-off initiatives, or outcomes yet to be contemplated.

Minister Eggen recently said, "[I've been pushing hard for school boards to co-operate in regards to transportation and procurement, even physical buildings.](#)"

At the Edmonton Public Audit committee, the addition of external auditors has added great value to our board internal processes. It is helpful to have an external set of eyes review processes, ask questions and share ideas.

In our own District, one area I've been impressed with is the economies of scale that we can apply to 205 schools. Our Finance and Central staff team have been looking at various processes to make sure that we are always putting our core mandate first: education. For example, at Edmonton Public, shared purchasing of Chrome Books saved 25%. Shared waste management collection saved resources as

well. The contemplation of bulk purchasing graphing calculators for high school students through our District purchasing is another of the additional ideas that we could showcase. As a large district, we can take advantage of economies of scale and save dollars for all students.

Another example of collaboration that comes to mind is the shared transportation initiative with Edmonton Catholic Schools; the Edmonton Student Transportation Authority could save \$2.5 million and result in efficiencies annually.

Findings from our blue ribbon panel would be shared with other school districts and government funders. Millions could be redirected every single year back to classrooms across Alberta, school fees eliminated, and much more.

Here are just a few Ideas that could be explored:

- Technology purchasing
- Software licensing - investigate provincial or geographic software licenses and shared hardware for enterprise systems that can be used by a number of jurisdictions
- Regional student transportation departments
- Common purchasing arrangements - economies of scale across regions
- Infrastructure
- The sharing of business services (e.g., payroll, infrastructure project management, transportation, etc.)

RECOMMENDATION

- 1. That the Edmonton Public School Board initiates a blue ribbon, third party panel to study efficiencies in operational services of school jurisdictions across the province in all education spending to ensure that resources provided to the classroom are maximized and front line staff are protected.**
- 2. The Edmonton Public School Board allocates \$10,000 from the Board initiative fund to cover meeting expenses and incidentals of the panel.**

NEXT STEPS

If approved, this initiative would be delegated to the Board Audit Committee to determine logistics. The timeline could focus on specific areas and would be coordinated with input by our administration.

The outcomes identified would be brought forward to a future public Board meeting and shared with the provincial government.

MJ:mj

School Technology Equity Project Summary

Guiding Principles

1. Equity across the District was the focus.
2. Chromebooks: A student to device ratio of 2:1 is the initial target in K-9, 3:1 in high schools, factoring in BYOD and student age levels, existing target funds. (Budget: \$1.6M - 2016-17).
3. Interactive Projection Systems (Epson): All classrooms require an easy to-access (i.e. mounted), working, reliable projection system. (Budget: \$1.35M in 2016-17 + \$1.35M in 2017-18). (Note: The original plan of 50% in 2016-17 and 50% in 2017-18 was revised and fast tracked to a 75%-25% split)
4. Core infrastructure such as network switching gear should be managed for all schools, in order to realize cost savings and ensure equity regardless of school size.

School Switch Project

A school's network provides connectivity for staff and students to use a variety of devices such as PCs, laptops, Chromebooks, telephones, and smartphones to access local services like printers and file sharing, as well as centrally provide services like Internet, Google Apps, youtube, Schoolzone, Peoplesoft and FIS. The school's network also provides services to the District's facilities area for monitoring systems as well as school infrastructure that requires network connectivity.

School selection process

The following points are in consideration when prioritizing which schools to perform network upgrades:

- Number of network switches that are now considered "End of Life" or otherwise unable to deliver sufficient capacity for today's needs.
- Number of switches that will be nearing End of Life during the school year.
- Ability to consolidate smaller switches (those with 24 ports) into larger chassis which in turn make the smaller switches available to use in smaller schools for upgrades.
- Current network design where it does not meet current best practices or otherwise limits capacity.
- Pending Network, renovation, or VoIP upgrades.

It's also important to ensure we select a distribution that represents schools from each catchment.

Cost Savings Realized

Working with Purchasing, EPSB used the GOA standing agreement as a starting point for discussions with the hardware manufacturer on bulk order pricing. Most discounts are based on small orders thus leaving negotiation room on very large orders. Our bulk order represented \$843K in equipment alone netting a price that was 30% lower than the individual pricing on iProc, which would have totalled \$1.2M, thus netting a savings of \$372K over buying individually. Another way to look at it is that we were able to upgrade 30% more schools with modern network technology using the same budget dollars.

Chromebook Equity Project

School Selection process

- Factors considered included current school budget plans for technology (from Budget Services), infrastructure projects, overall budget situation (from Assistant Superintendents), and the need to adjust allocations to work within the overall budget (for 5000 devices across the entire District).
- 87 schools were identified and provided with carts of Chromebooks.
- All schools were also offered the opportunity to purchase additional Chromebooks at the negotiated rate (bulk price) of \$256 CDN unit (a 20% savings from our negotiated contract price with the approved vendor).

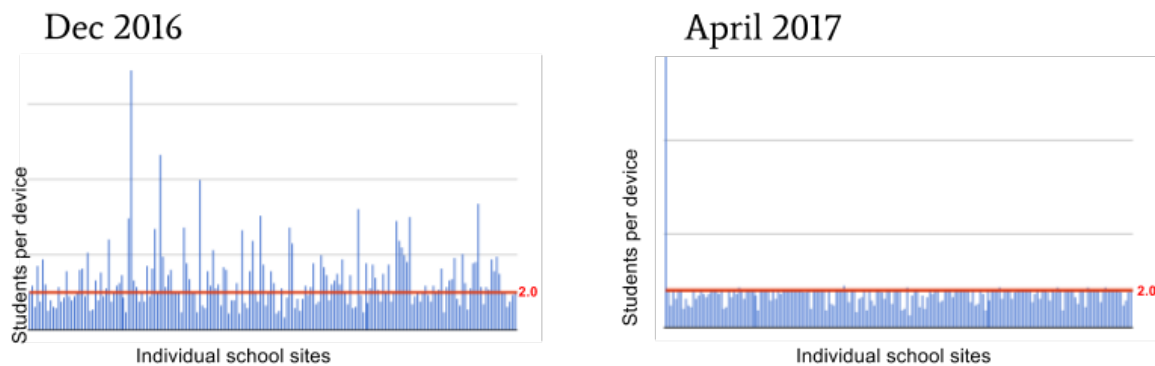
Cost Savings realized

The Chromebook equity project resulted in a savings of \$275K just for procurement. An additional 4798 units were made available to schools at the discounted price, translating to an additional savings of \$259K in acquisition costs (\$534K total).

For support costs through ITS - Chromebooks cost about 80% less than laptops/desktops to support (ITS-TAU charges), so schools replacing Windows devices with Chromebooks saw a significant reduction in tech support costs. The total reduction in support costs to schools will be \$155K on this year's budget, coupled with a dramatic *increase* in the number of devices (+6500) available for students.

Equity of Access achieved

Over 5000 Chromebooks and storage/charging carts were deployed to 87 sites in just over 6 weeks (Jan-Feb 2017).



Projector Equity Project

School Selection process:

- Classrooms *without* a reliable, functional (& permanently mounted) projection system were eligible. ITS Technicians worked with TIPS & school staffs to identify the need.
- Matching funds:
 - In *most* cases schools must provide matching funds to participate in this project which provides the hardware and installation of interactive white-board (IWB) projection systems (Epson 695wi, mount & board) in each identified classroom.
 - Assistant Superintendents have identified some schools where full funding to replace or install interactive classroom projection systems will be provided.
- There were 1,018 IWB systems to be installed at 106 sites between May 2017 and December 2017.

Cost Savings realized

Volume purchasing of the hardware and installation has resulted in significant savings to the district when compared with schools purchasing ad hoc (savings of \$304K).

Equity of Access achieved

When the project is complete, nearly every classroom in the District will have a reliable, mounted interactive display system. These systems are used daily by teachers of all subject areas and technical ability.

Proposed District School Supplies Pilot – 2017 2018

Goal

To reduce the school supply cost to parents (through bulk purchase power) and to standardize the supply list so that Student X in grade Y at School Z has the same supply list as if they attended School Q.

Concept/Proposal

With the support of District schools, a standard school supply list per grade will be developed. Purchasing & Contract Services (PCS) will then negotiate with a supplier, a purchasing agreement which should see significant savings for the District as the supplies would be delivered to one location, the Distribution Centre, during the supplier's non-peak month of July. The Distribution Centre would then be able to deliver the supplies to schools prior to the first day of classes.

With a District purchase agreement with a third party vendor, families would order and pay for the supplies directly through the supplier in June (EPSB would not be recording or collecting the revenue). This initiative is not to generate revenue for the District, but to help reduce the cost to families.

Status

In December 2017, schools from the JP Catchment were contacted to review/update a working copy of a potential standard school supply list that was initially drafted by a group of principals in the Spring of 2017 to act as a guide in conjunction with the roll out of Bill 1.

In order for this initiative to work, consensus would be required on a standard list of supplies per grade. If individual schools had specific/unique requirements, they would have to be prepared to cover these costs out of their school budget rather than sending a second supply list to families. This created challenges for the pilot group of schools based on the individual school programs and teachers. Not only were we unable to get consensus on quantities of the initial list, there were a number of additional supplies that were added to the initial list, again reflecting the differences between schools.

The results of the supply list pilot were presented to DST on December 20, 2017 at which point it was decided to defer this initiative, until such a time that we are able to come up with a single standard school supply list (per grade) that would meet the needs of our individual schools.