

DATE: January 28, 2020

TO: Board of Trustees

FROM: Darrel Robertson, Superintendent of Schools

SUBJECT: Annual Update on Operational Efficiencies 2018-2019

ORIGINATOR: Todd Burnstad, Chief Financial Officer

RESOURCE

STAFF: Janice Aubry, Lea Beeken, Stephanie Galba, Brenda Gummer, Terry Korte, Geoff Holmes, Roland Labbe, Amanda Lanctot, Robert Mah, Madonna Proulx

REFERENCE: [Alberta Education Purchasing Group \(AEPG\) Education Act](#)

ISSUE

This information report contains the 2018-2019 update, which is presented to the Board of Trustees annually, on the operational efficiencies undertaken to maximize the amount of education dollars directed to the classroom.

BACKGROUND

For purposes of this discussion, the following information includes: efficiencies that were continued from 2017-2018, new efficiencies that occurred during the 2018-2019 school year, and other efficiencies currently being explored.

The Provision of Educational Facility and Capital Planning Services to School Jurisdictions (continued from 2017-2018)

Infrastructure provides educational facility and capital planning support to school jurisdictions through contracted services.

An example from 2017-2018 is:

- Development of Ten-Year Facilities and Three-Year Capital plans for Black Gold School Division and Elk Island Public Schools.

Examples from 2018-2019 include:

- Development of a Five-Year Investment Facilities Grant and Capital Report to Northlands School Division.
- Consulted on a facilities review and developed a Three-Year Capital Plan 2020-2023 for the Parkland School Division, which was approved for submission to Alberta Education in April 2019.

We are currently in discussions with Elk Island Public Schools regarding potential support for engagement to help inform decision making in relation to specific capital priorities.

Collaborative Transportation Service with Edmonton Catholic Schools (continued from 2017-2018)

Following discussions between Edmonton Public Schools and Edmonton Catholic Schools in the spring of 2018, a shared transportation arrangement was pursued to expand existing shared bus routes and to

find efficiencies. While students from each jurisdiction will ride separately, the buses operating these routes will be shared and the costs and efficiencies will be split between the divisions.

In the 2018-2019 school year, administration implemented 25 bus routes using the shared transportation arrangement. This shared agreement resulted in cost savings of over \$600,000 for Edmonton Public Schools. In the 2019-2020 school year, an additional two routes were added bringing the total of shared routes to 27 and will result in \$650,000 in savings for the Division.

Integration of Transportation Service Types (continued from 2017-2018)

Effective September 2018, shared service types were piloted at three locations. This service type is intended to align the service model with program goals where some students attending special needs programs have been transitioned from a curb-side pickup to a walk-to-stop service. This has resulted in shorter ride times, improved route reliability, and a cost savings of approximately \$150,000. An additional savings of approximately \$50,000 are anticipated in the 2019-2020 school year.

Bus Pass Reporting

A joint initiative between Financial Services and District Technology began in 2018-2019 to simplify the way in which schools submit their monthly bus pass summary reports and remit their bus pass fees to Financial Services. Collaboration between the two departments saw business processes streamlined through the development of a software script that was written to extract bus pass data directly from the Fees Management System (FMS) and import it directly into Finance Live (schools and central departments' financial dashboard).

The new automation in the long term, will significantly reduce the amount of data entry time for both school and central staff involved in the bus pass fee process. In May 2019, the new automation was rolled out as a pilot project with eight schools. From May through October, feedback was gathered and further improvements/enhancements were made to both business processes and systems. A Division-wide rollout to all schools took place in November 2019. Training and ongoing feedback was delivered/received through the following:

- Google hangouts
- training with administrative assistants on professional learning days
- a training manual and a supporting summary document
- ongoing telephone and email support.

Changes for bus pass fees effective February 1, 2020, are currently being implemented into the new system.

Provincial Brokering Model Initiative (continued from 2017-2018)

The result of the Provincial Brokering Model Initiative was the creation of the Alberta Educational Purchasing Group (AEPG). AEPG consists of procurement professionals from across six school divisions and three education organizations under a shared accountability and responsibility model.

AEPG has created a one-stop-shop purchasing portal for all K-12 school divisions. This allows smaller schools divisions to benefit from shared expertise, experience and skills which are leveraged to reduce costs and duplication of effort, as well as create administrative efficiencies. Participation by school divisions is voluntary.

The portal includes:

- Procurement opportunities where other school divisions have been included to participate in contracts already established.
- Information on Service Alberta Standing Offers and other purchasing consortium information (Cybera/RMA Trade).
- A repository for procurement-related documents such as tendering and contract templates.
- Potential for a forum for discussion around potential procurements.

The formal launch took place on December 3, 2019, in an email distributed by the Association of School Business Officials of Alberta (ASBOA). Similar emails were also sent out by College of Alberta School Superintendents (CASS), the Alberta School Board Association (ASBA) and the Association of Independent Schools and Colleges in Alberta (AISCA).

Additional updates will be sent to the distribution list on an ongoing basis.

Registered Vendor Self-Registration Process

To automate the registration process, vendors now have the ability to self-register on Bonfire (a third party online tendering software). They select a “vendor type” and then upload all their required documents based on their vendor type. Purchasing and Contract Services (PCS) staff then review and verify the documents. Vendors are automatically notified by Bonfire when their documents are expiring so they can update with current versions. Failure to update documents prior to the expiry date results in the vendor going into pending status.

To start the initiative, a link to register was sent to approximately 1,200 current Division vendors. To date, approximately 200 vendors have fully registered on Bonfire. The intent is that a list of all currently registered vendors will be available on Connect. This will allow schools and central DUs to inquire if a vendor is registered prior to engaging them. The list will be updated regularly.

Point of Sale (POS) and Online Payments (continued from 2017-2018)

The goal of this initiative is to reduce the amount of physical cash being handled in schools and to reduce the service fee costs associated with processing payment transactions by debit or credit card.

Schools currently collect cash and cheques for school fees, transportation fees, etc. (school generated funds). The largest drawback for smaller schools is the transaction fees charged by the third party debit and credit card payment processing vendors. With service fees being reduced, the goal is to onboard more schools to accept debit and credit payments.

In the spring of 2018, through the Request for Proposal (RFP) process, Global Payments was announced as the preferred payment processing vendor. The contract with Global Payments results in competitively lower rates for point of sale (POS) and online transactions, as well as the ability to provide cost reporting at a Division level. The transition to Global Payments supports the initiative of moving our schools to cashless transactions. This is not only more convenient for our parents and end users, but it also reduces the amount of time our administrative staff spend counting cash, driving to the bank for deposits and ensuring that cash controls are correctly in place.

Based on estimates prepared by Financial Services, a school should see a reduction in transactions fees of approximately 33 per cent. For the current school year, our schools have collectively saved up to

approximately \$82,000 in transaction fees when compared to the rates of other processing payment providers. To date, there are approximately 108 school and central departments that are actively accepting payments via their POS machine. Currently, 124 schools are set up to accept online payments through Global Payments via SchoolZone.

School Fee Reporting

The *Education Act* which came into effect on September 1, 2019, included a number of changes that reduced the amount of reporting required by schools and administration. Previously, school divisions were required to project/forecast each fee that needed to be charged to families on a cost-recovery basis by May 31 of each year for the subsequent school year, concurrent with the submission of the budgets. Schools would project their fees in March and April and have the information populated and completed for review and collation by Financial Services by mid-May. A detailed listing of all fees charged across the Division to Alberta Education was then submitted by Financial Services for a comprehensive review and inquiry. Any fee that increased by more than five per cent required an explanation as to the increase.

Under the revised School Fee Regulation, detailed reporting by Alberta Education has been removed and the explanation of any fee increase is no longer required. Financial Services is currently reviewing processes in order to maintain transparency with families while removing non-value added tasks that had been put in place specifically to comply with the previous School Fees and Costs Regulation.

A review of alternatives is currently underway as well as discussions on risks associated with those alternatives. This will reduce administrative burden from each of the schools in the months of April and May and from Financial Services in the months of May and June, as well as throughout the year.

Enterprise Print (continued from 2017-2018)

As referenced in last year's report, the enterprise print process is currently being deployed to schools based on modern technologies available. Currently, 91 schools have had a print audit completed and 71 have implemented a full or partial enterprise print approach.

Enterprise print can alleviate printing issues such as:

- documents printed and not retrieved
- duplicate printing of documents in error
- print jobs accidentally retrieved by another staff member resulting in duplicate printing
- issues with sensitive information being printed and not picked up right away
- using work time to search out the owner of a document not retrieved by a staff member.

Although our work requires a large amount of printing the enterprise print process allows us to be more efficient in working to reduce printing and the costs associated with it. District Technology estimates that the Division could save \$1.5 million per year once all schools have been converted to enterprise print systems.

Enhancements to SchoolZone (continued from 2017-2018)

In fall 2018, enhancements were released on SchoolZone that allow parents to complete the Student Information Correction Form and the Freedom of Information and Protection of Privacy (FOIP) Form through SchoolZone. These enhancements have a number of benefits; including reduced staff time to enter changes, ease of access for parents to complete the form and the ability for staff to track completed forms through a familiar SchoolZone interface. Additionally, as the FOIP Form is captured and

tracked digitally, there will no longer be a need to update the form annually, resulting in further efficiencies.

Additional refinements to these processes were rolled out in the fall of 2019 based on feedback from the first year of implementation. An additional forms functionality has also been developed which will enable schools to upload their own forms to SchoolZone for completion by parents. A test pilot of this new functionality will be conducted by a small group of schools.

Finally, an enhancement has been added to the pre-enrolment selection for the 2020-2021 school year. This will assist schools in meeting the Alberta Education regulation that requires a parent to annually confirm, in writing, their child's enrolment. This enhancement should have significant impacts on staff workload regarding the Student Information Correction Form starting in the 2020-21 school year.

New School Builds and Planning

District Technology has worked closely with the Project Management Office and the New School Design Teams during design and implementation phases to ensure new schools and modernizations meet the needs of our students and staff. Information from previous builds and also feedback from students and staff is leveraged to ensure a robust and flexible infrastructure is in place. Spaces are designed to be flexible and meet the needs of 21st century learning and beyond.

By participating in the design phase of these builds, the number of change orders are reduced and the likelihood of equipment being installed in wrong locations is also reduced, thereby reducing unnecessary rework. District Technology works closely with the new school's assigned principal to establish a vision and ensure the technology within the school supports this teaching and learning vision.

Centralized response to Alberta Education Audits (continued from 2017-2018)

Through the use of Google tools and Pinpoint, central staff across departments and schools worked together to respond to an Alberta Education Enrolment Verification Audit. The Enrolment Verification Audit for 2019-2020 has recently commenced and includes a Registration and Attendance (RA) Audit. Central departments will continue to work with schools to improve the registration processes to minimize the potential impact to funding and the work required by schools. This work includes both the addition of programming controls in PowerSchool and monitoring of enrolments by Student Information staff.

Alberta Education documentation requirements have changed and, as a result, the RA audit required more exact attention to the annual signed registration form. All schools had the opportunity to participate in remote training in September (nine Google Hangouts) in order to learn about the new documentation requirements and to brainstorm strategies to ensure that the annual signature was collected. This has improved our work to collect the documentation required by the Province for the registration of students.

Administration continues to work with Alberta Education to clarify and understand the documentation requirements in order to minimize the workload at schools and the impact on families.

Digital Provincial Student Record (continued from 2017-2018)

The Division has invested in a digital student record program (Pinpoint) since 2008, in a partnership between District Technology and District Information Management. As the province is requiring all school boards to transfer student records digitally by the 2020-2021 school year, many school boards

are requesting information and advice from the Division on how to move forward. Opportunities for collaboration and economies of scale continue to be considered.

Phase one of the syncing process between Pinpoint and the province was built by District Technology. Provincial conformance testing of the syncing process has been underway throughout the fall. The initial sync of our digital repository, Pinpoint, with the Provincial digital student record will occur in February 2020.

Students who are inbound from other Alberta school divisions will arrive with digital documents already in place in Pinpoint, to allow schools to program immediately for success. Central Records will no longer be required to scan student record documents from other divisions, resulting in a significant time savings. Outbound students will have their documents already in place for use by teachers and administrators in other divisions. The syncing process supports students in transition as they move between school divisions. The required effort to transfer student records to other provincial divisions will be greatly reduced.

Edmonton Regional Collaborative Service Delivery (ERCSD – continued from 2017-2018)

Throughout the 2018-2019 school year, Inclusive Learning in partnership with ERSCD, continued to provide an enhanced, coordinated delivery of services and supports to students, families and school staff within their schools. These initiatives continue within this present school year.

Through the development of Information Sharing Agreements, wraparound service providers can efficiently access the information required to provide timely and integrated services. Pinpoint, the digital student record, provides a common repository of critical documents to inform and target services.

The Provision of Instructional Support Services to Alberta Education, School Jurisdictions and Organizations (continued from 2017-2018)

Many Division departments annually provide supports to Alberta Education, school divisions and organizations, either through partnership agreements, or informal collaboration, enabling access to professional learning services and events or contracted services.

Examples continued from 2017-2018 include:

- Contracted instructional support services to regional learning consortia, other organizations and other school divisions for presentations and consultations.
- 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 divisions.
- Collaboration with numerous divisions to share expertise and develop resources for the implementation of supports for teaching for conceptual understanding and for implementing the new curriculum.

Example from 2018-2019 include:

- SOGI 123, a collaborative educator network between school divisions in BC and Alberta, in support of policy information, creating of inclusive classrooms, resource sharing re: sexual orientation and gender identity was created.

Examples of opportunities being investigated include:

- Exploration of processes and tools for sharing Division-developed teaching and learning resources with other school divisions and the general public.
- Development of processes and tools for sharing teaching and learning resources that have been collaboratively developed with other school divisions.

KEY POINTS

As noted above, Edmonton Public Schools continues to collaborate with other school divisions, organizations and working committees. This collaboration not only maximizes provincial education funds, but also creates efficiencies resulting in cost savings and the ability to provide better supports and services for all students in the province of Alberta.

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