SESSION

RedRover K-12 HR & PAYROLL LEADERSHIP FORUM

Stop the Guesswork: Bringing Control & Clarity to School Workforce Planning





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Stop the Guesswork

Bringing Control and Clarity to School Workforce Planning

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If HR, payroll, and finance each reported your district's filled FTE today, would all three numbers match?

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People v. Positions

- **A position is the seat: a funded, budgeted role that exists whether or not anyone currently sits in it.**
- **A person is whoever is in that seat right now, and people move on. The position stays.**

Position 123

- Fifth-grade teacher
- 1.0 FTE
- Valley Elementary
- General Fund
- Authorized for the school year

Current employee

- Jordan Lee
- Step 8
- Started August 24
- May transfer, resign, or take leave

Two workable approaches

CENTRAL VALLEY SD

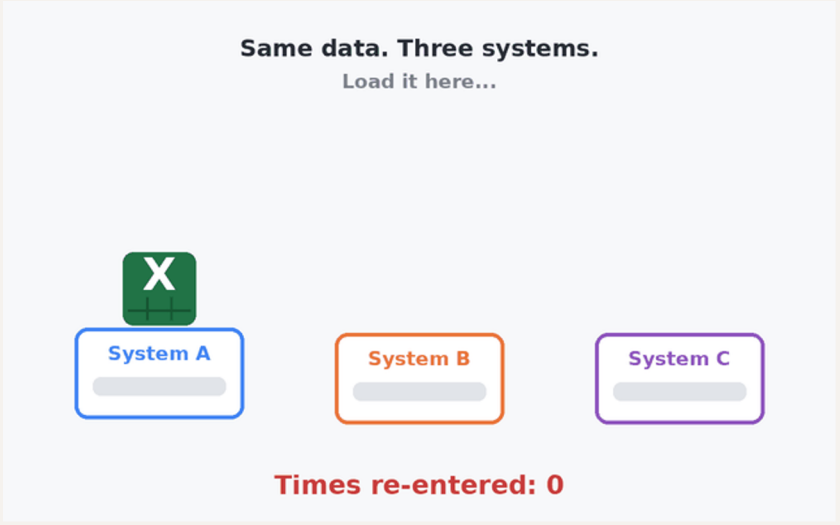
- Tracked via a “position type” field in the ERP, mirrored exactly in Red Rover
- Managed by FTE, not down to the account code level
- New position types are created deliberately, not on the fly

TIGARD-TUALATIN SD

- Every position gets a unique, permanent position number
- That number is tracked across systems for reporting and history
- Reused when a person leaves, with care taken to close out the old assignment first, since forgetting to terminate it causes overlap confusion

Workforce Structure and Automation

- **Intentionally construct the district workforce structure**
- **Use CBA language whenever possible**
  - **Avoid slang and district office shorthand**
- **Turnover and loss of institutional knowledge are real!**
  - **Document processes and keep them maintained (I know it's a pain)**
- **Use consistent language across systems.**



Should this position be created?

Scenario:

A principal requests a 0.466 FTE instructional assistant. The position would use Title I/TSI-CSI funding. The principal wants to post immediately because student needs are increasing.

Which of the following are needed before a position is created?

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Scenario:
A principal requests a 0.466 FTE instructional assistant. The position would use Title I/TSI-CSI funding. The principal wants to post immediately because student needs are increasing.

Which of the following are needed before a position is created? (Select all that apply)

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Position control throughout the year

Central Valley:

- **Builds a working copy separate from the live system each budget cycle**
- **Payroll and HR review every position building by building (eliminations, additions, changes)**
- **Keeps the provisional database running year-round**
- **Compares the provisional database against the live system to catch drift early**
- **tracking vacancy window**

Tigard-Tualatin:

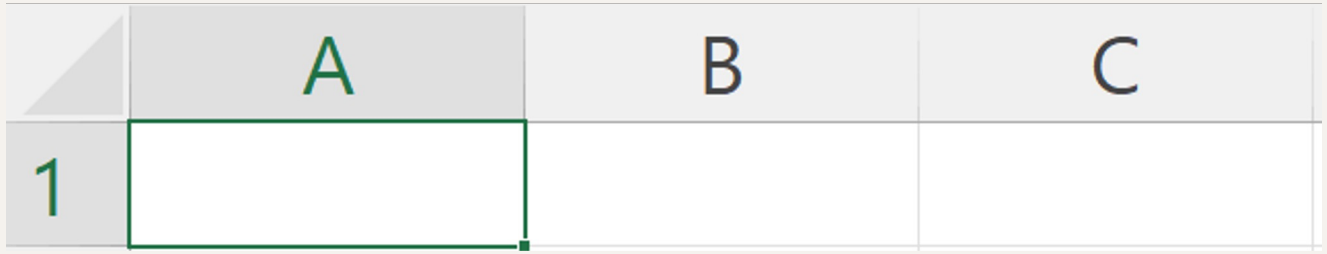
- **Builds a provisional position database each budget cycle separate from the live system**
- **HR and business teams collaborate in a joint working session**
- **Walks every position building by building to review changes**
- **Reviews provisional books and Infinite Visions open side by side**
- **Manual maintenance of staffing sheets**

Reports that reveal problems early

Do you have exception reports?

Examples:

- **Assigned FTE exceeds authorized FTE**
- **Employee has no valid position number or type**
- **Position has overlapping employee assignments**
- **Positions don’t match across systems**



What remains difficult?

- **Connecting long-term substitutes to specific positions**
- **Capturing custodial vacancy costs when coverage appears as overtime**
- **Reconciling outsourced substitute data**
- **Showing where a candidate is in the hiring process**
- **Maintaining data across multiple systems and spreadsheets**

What challenges do you face? What is your Wish List of what your system could do?

One change to take back

Choose one action that would create the greatest improvement for your district:

- **Separate employee assignments from position records**
- **Establish a durable position identifier**
- **Clarify who can authorize a position**
- **Conduct a monthly HR/payroll/finance reconciliation**
- **Build one exception report**
- **Add effective and end dates to temporary funding or assignments**
- **Other?**

THANK YOU!

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