ADMINISTRATIVE PROCEDURE

REQUEST FOR A CENTRAL OFFICE REORGANIZATION	4106 Procedure No. May 1, 2010 Date

I.   **PURPOSE:** To document the process for creating, updating, rearranging and/or end dating organizations **after the annual budget process**. Management initiated requests to change the approved organization structure between July 1 and June 30, after the adoption of the budget, are also governed by this procedure.

II.   **BACKGROUND**: From time to time, it is necessary for Prince George's County Public Schools to create new organizations or units or restructure existing organizations or units to meet the conditions and evolving needs of the school system. This process will describe the necessary steps required to effectively and efficiently facilitate such changes.

III.   **DEFINITIONS**: [Alphabetical order] The following definitions are pertinent to the administrative procedure.

A.   **Account Manager** – A management level employee who is assigned financial decision-making responsibilities to include budget formulation, execution and control of funds.

   Divisional Level Account Managers are Associate Superintendents (Chiefs and Executive Directors), Assistant Superintendents, Officers or other executive level employees who report directly to the Deputy Superintendent or Superintendent.

   Department Level Account Managers are typically Directors, Officers or Principals that report directly to Divisional Level Account Managers.

   Office and/or Program Level Account Managers are typically Supervisors who report directly to Department Level Account Managers.

B.   **Central Office Organizations** – Departments or units within the school system that indirectly impact children and are not defined as a school.

C.   **School Organizations** – Departments or units within the school system that are defined as an Elementary School, Middle School, High School, Combined School, Charter School and Alternative School.

D.   **Divisional Reorganization** – The realignment, creation and/or end date of organizational departments, offices or programs within the same division that require a change to the Division's organizational structure. This type of reorganization is initiated by Divisional Level Account Managers.

ADMINISTRATIVE PROCEDURE

REQUEST FOR A CENTRAL
OFFICE REORGANIZATION

4106
Procedure No.

May 1, 2010
Date

E. **Oracle Hierarchies** – Used in Oracle to control reporting relationships and to facilitate security access to information. The following hierarchies are relevant to this administrative procedure:

1. **Organization Hierarchy** – Used in Oracle to create reporting relationships between organizations as defined in the Prince George's County Public Schools organization chart and to control access to information. This hierarchy is manually updated when there is an approved organizational change resulting in the creation of a new or realigned organization. The Oracle modules that use the organization hierarchy for security access are I-Expense and Payroll.

2. **Position Control and Fill a Vacancy Hierarchies** – Used in Oracle to define the approval workflow for creating, updating or filling vacant positions. The workflows for these hierarchies are defined in the Position Control and Fill a Vacancy Administrative Procedures. Positions maintained in these hierarchies are limited to Account Managers and Secretaries. The hierarchies are manually updated when there is an approved organization change resulting in the creation, transfer or deletion of an existing Account Manager or Secretary position.

3. **Requisition Hierarchy** – Used in Oracle to define the workflow for approving requisitions and purchase orders based on spending limits. Purchasing maintains the Requisition Hierarchy and Spending Limits by position of authority. The approvals are manually updated when there is an approved organization change resulting in the creation, transfer or deletion of an existing position of authority.

F. **Oracle Responsibilities** – The security function that defines and allows employee access to Oracle modules. In accordance with Administrative Procedure 0703 Information Technology Services ERP (Oracle) Password Procedures, training must be obtained prior to receiving access to Payroll, iProcurement and Financial Applications. Training is coordinated by the Technology Training Department under the Division of Information Technology. The creation and maintenance of Oracle Responsibilities resides with Technology Enterprise Systems under the Division of Information Technology.

G. **Organization** – Organizations are assigned to each unit of the School System and denotes various levels within a hierarchy based on the School

2

ADMINISTRATIVE PROCEDURE

REQUEST FOR A CENTRAL
OFFICE REORGANIZATION

<u>4106</u>
Procedure No.

<u>May 1, 2010</u>
Date

System's organization chart. Organizations form the basis for security and access to information and provide roll-up or summary reporting for Human Resources and financial data.

The following organizational levels or hierarchy are represented in the School System's organization chart:

1.   Board of Education

2.   Superintendent

3.   Deputy Superintendent

4.   Divisional Level

5.   Department / School Level

6.   Office and/or Program Level

H.   **Organization Centralization** – The transfer of school-based supporting personnel from a school organization to a central office organization. Employees are managed by the central office organization, while employee duties are performed at a school location. Employee costing is realigned with the central office organization costing.

I.   **Realignment** – The transfer of an organization from one parent organization to another.

J.   **Reorganization** – The rearrangement, realignment or modification of existing organizational levels or units within the current School System's organizational structure.

K.   **System Reorganization** – The realignment, creation and/or elimination of organizational divisions, schools, departments, offices and/or programs that require a change to the School System's organizational structure. This type of reorganization is initiated by the Superintendent or designee.

IV.   **PROCEDURES**: The following procedures apply when a division and/or department is planning to reorganize:

A.   **Requesting a new organization.**
If the proposed action is to request a **new organization** (department, office or program), the subsequent steps must be followed:

ADMINISTRATIVE PROCEDURE

REQUEST FOR A CENTRAL OFFICE REORGANIZATION	4106 Procedure No. May 1, 2010 Date

1. The Requestor/Divisional Level Account Manager must prepare the following documents:

   a. A narrative memo that describes the proposed changes including background information concerning the reorganization, such as mission, core services, goals and objectives (conducive to performance measures) of the revised organization, as well as any programs or related information about operation, organizational, functional and programmatic relationships that will be affected;

   b. The current and proposed divisional organization charts; and

   c. An Organization Action Sheet to include pertinent and required information. (Document attached)

2. The Requestor will forward the documents to the next approval level (Superintendent and/or Deputy Superintendent) as defined in the School System's organization chart.

3. If the request is approved, the Superintendent or Deputy Superintendent will forward all documents to the Chief Financial Officer who will distribute to the Organization Review Committee to include representatives from Budget and Management Services, Fiscal Compliance and Quality Assurance, Human Resources, Information Technology, Payroll and Purchasing.

4. The Organization Review Committee will coordinate the following steps, within their departments, to update the necessary Oracle modules within 7 business days of notification, in the following order:

   a. Budget and Management Services will submit a new account request form to Accounting to create the new cost center and account strings; enter budgeted funds; update the Position Budgeting (PSB) hierarchy; and provide the new cost center information to the Organization Review Committee members.

   b. Technology Enterprise Systems will create and update the Oracle Responsibility names associated with the new cost center.

4

ADMINISTRATIVE PROCEDURE

REQUEST FOR A CENTRAL
OFFICE REORGANIZATION

4106
Procedure No.

May 1, 2010
Date

    c.   Purchasing will create a new location code.

    d.   Fiscal Compliance and Quality Assurance will create the new organization and update the organization hierarchy.

    e.   Human Resources Information Systems (HRIS) will create the new positions and assign the new positions to employees.

    f.   Fiscal Compliance and Quality Assurance will update the Position Control and Fill a Vacancy hierarchies; facilitate Oracle Payroll and Non-Payroll Account Request forms with the department Account Managers.

    g.   Purchasing will update the Requisition hierarchy.

    h.   Fiscal Compliance and Quality Assurance will facilitate the Oracle Responsibility requests with the Requestor.

    i.   Payroll will create and/or update payroll groups for timekeepers and approvers.

    j.   Technology Enterprise Systems will assign non-payroll and payroll responsibilities to employees.

    k.   Human Resources will notify the Requestor and employees with the new organization information.

B.   **Realigning an organization**.
If the proposed action is to request an **organization realignment** to transfer an existing organization from one parent organization to another parent organization, the requestor must follow steps 1 through 3, as in the **request a new organization** process, along with the subsequent steps:

    1.   The Organization Review Committee will coordinate the following steps, within their departments, to update the necessary Oracle modules within 7 business days of notification, in the following order.

        a.   Budget and Management Services will update the cost center hierarchy in the General Ledger Segment Value; realign budgeted funds and update the Position Budgeting (PSB) hierarchy.

5

ADMINISTRATIVE PROCEDURE

REQUEST FOR A CENTRAL
OFFICE REORGANIZATION

4106
Procedure No.

May 1, 2010
Date

      b.   Technology Enterprise Systems will update the Oracle Responsibility names.

      c.   Fiscal Compliance and Quality Assurance will update the Organization, Fill a Vacancy and Position Control hierarchies.

      d.   Purchasing will update the Requisition hierarchy.

      e.   Human Resources Information Systems (HRIS) will update the supervisor position number on the position record; update employee records with the new supervisor name and notify the Requestor when the reorganization has been completed.

      f.   Payroll Services will test and adjust as necessary timecard set-ups.

C.   **Modifying an existing organization**.
If the proposed action is to **modify the organization** by changing the name, location or eliminating an organization, the subsequent steps must be followed:

1.   The Requestor/Divisional Level Account Manager must submit an Organization Action Sheet to include pertinent and required information.

2.   The Requestor will forward the document to the next approval level (Superintendent and/or Deputy Superintendent) as defined in the School System's organization chart.

3.   If the request is approved, the Superintendent or Deputy Superintendent will forward the document to the Chief Financial Officer who will distribute to the Organization Review Committee to include representatives from Budget and Management Services, Fiscal Compliance and Quality Assurance, Human Resources, Information Technology, Payroll and Purchasing.

4.   The Organization Review Committee will coordinate the various steps, within their departments, to update the necessary Oracle modules within 7 business days of notification.

ADMINISTRATIVE PROCEDURE

REQUEST FOR A CENTRAL
OFFICE REORGANIZATION

4106
Procedure No.

May 1, 2010
Date

D. **Centralizing an existing organization.**
    If the proposed request is to **centralize an organization**, the requestor must follow the same steps as in the **organization realignment** process.

    Note: When a **system reorganization** is initiated by the Superintendent to revise the current School System's organization chart, the Chief Financial Officer and the Chief of Human Resources will submit the request to the Organization Review Committee for processing, based on the applicable preceding procedures.

V. **MONITORING**: The Position Control Management Group, which consists of the Chief of Human Resources, the Chief of Information Technology, the Chief Financial Officer and related staff meet weekly to review position control data and ensure that all reorganization requests are properly communicated and completed within the targeted time period. The Organizational Review Committee is under the guidance of the Position Control Management Group.

VI. **REPORTING:** The Position Control Management Group is responsible for the verification and production of monthly position control reports along with organization hierarchy reports to ensure proper alignment with the published organization chart.

VII. **RELATED PROCEDURES:** Administrative Procedure 0703, Information Technology Services ERP (Oracle) Password Procedures; Administrative Procedure 4101, Position Control; and Administrative Procedure 4105, Fill a Vacancy.

VIII. **MAINTENANCE AND UPDATE OF THESE PROCEDURES**: These procedures originate with the Chief Financial Officer and the Chief Human Resources Officer. Updates will be completed as needed.

IX. **CANCELLATIONS AND SUPERSEDURES**: None. This is a new Administrative Procedure.

X. **EFFECTIVE DATE**: May 1, 2010.

Approved by:
William R. Hite
Superintendent of Schools

Attachment: Organization Action Sheet for Central Office Departments
Distribution: Lists 1, 2, 3, 4, 5, 6, 10, and 11