

A Breakthrough Approach to Safety and Regulatory Compliance

With today's demands on administrator and staff time, limited budgets and resources, and continually changing regulations, it can be extremely difficult—if not impossible—to organize and maintain control of all the information and activities necessary to minimize potential liability and maintain strict compliance with all health and safety regulations across the district.

School officials need:

- an integrated approach that enables schools to implement, sustain, and communicate a comprehensive and

highly effective safety program that is at the same time practical and affordable;

- an approach supported by tools that provide a consistent framework for the management of virtually all aspects of development, implementation, and tracking of environmental, health, and safety matters, including compliance with OSHA and other federal, state, and local regulations; and
- an approach that requires far less staff time and effort to manage and execute, while providing senior administrators with the confidence that all processes are being

routinely performed on a timely basis and reflect best practices.

The Solution

Administrators from several school districts in southwestern Ohio collaborated to develop a fundamental breakthrough approach to address safety and regulatory compliance within public school districts. The result, Public-SchoolWORKS, is a comprehensive and integrated safety and compliance management system that combines powerful administrative software tools and resources to dramatically reduce the time required to implement and sustain regulatory compliance. The following are key components of the system.

COMPLIANCE MANAGER

Powerful, Web-based software enables a district to assign, schedule, auto-manage, track, and sustain recurring safety and compliance tasks, saving



By James M. Rowan and Steve Temming

Figure 1: E-mail Notice of Task To Be Completed

The following is an example e-mail notice to an employee about a compliance task. The e-mail is automatically sent by PublicSchoolWORKS, but comes from the CFO/Director of Business Affairs for the district.

From: Jim Rowan
To: clarkc@talawanda.org
Sent: Thursday, January 15, 2004 1:02 AM
Subject: Work Needing Your Attention: EHS-1943-12482

Dear Carla,

Attached is a document defining a task that has been assigned to you for completion. You may be the person directly responsible for completing the task and/or you may need to ensure others complete the task. Any supporting information and documents that you may need to complete this task have also been attached to this e-mail. If you have trouble opening an attachment, see "File Help" below.

You can report completing this task by either: a) calling 1-866-school-0, or b) clicking on the link below and following the directions on the screen.

Report completing this work order

If, after completing this task, there are follow-up issues that need to be addressed, click on the link below to submit a work request. **Do not** use the "Comments" field on the task order or completion screen to report follow-up issues.

Submit follow-up work request

This task is part of our district operations management and regulatory compliance program. Our school district has defined this task as an important part of our program to maintain safe, healthy, and comfortable schools.

See Attachment(s)

administrative time and eliminating reliance on individuals to remember what needs to be done and when. The system e-mails the responsible people, both internal and external (e.g. contractors) to the district, when routine tasks are due to be performed. Each notice includes specific directions, time schedule, forms, and support information needed to complete the task, such as inspection forms, employee notices, safety training courses, etc. (See Figures 1 and 2.) Friendly reminders are built into the system should someone forget to report the task complete.

PublicSchoolWORKS includes a unique system of template books. Each book contains an extensive set of pre-developed safety and compliance tasks appropriate to a given state or program, such as Ohio K-12 Schools or OSHA Regulations. A district need merely copy one or more books into their Compliance Manager, instantly providing a comprehensive compliance program for the district.

Each task in a template book is tied to a statewide district master managed by PublicSchoolWORKS. A special color coding indicates the status of each district compliance task relative to the master template book. This gives PublicSchoolWORKS the ability to convey regulatory updates and changes, and modify or create tasks as appropriate. Each district need only scan their task library and note changes. Template book tasks are coordinated with model written plans and regulations. Thus, the safety and compliance tasks implemented by the district follow the written policies and procedures.

Employees have five options for reporting completed work, including calling the Call Center, clicking on a link in the e-mail notice, or entering the task number on the dis-

trict Web site. Automated follow-up and tracking helps ensure that no task or hazard report falls through the cracks and that all tasks are documented. Reminders are sent to responsible people until tasks are closed, with notices going to managers on an exception basis.

Historical task records are readily accessible and can be sorted by school, subject (e.g. hazard communication), people assigned to complete tasks, date range, and more.

ON-LINE TRAINING

On-line safety training courses provide highly effective, time-efficient training for staff and faculty without the time and travel expenses associated with traditional professional development. An extended course library (more than 40 safety-related courses) provides a single cost-effective source for nearly all training needs by making a comprehensive range of adult training courses readily available on an as-needed basis.

A learning management system (LMS) ensures that employees participate in all appropriate training on a timely basis by identifying and assigning each individual's course plan, tracking progress, and recording test results. Employees can be batch-loaded or self-enrolled to create accounts. The LMS automatically documents training by maintaining a learner profile and complete transcripts for all employees.

Instructor assistance and site-specific information are included. Simple tools to integrate and convey site-specific information, coupled with other components of the PublicSchoolWORKS system (such as a 24/7 hotline) provide a unique way to comply with many regulatory training requirements without instructor assistance.

Figure 2: Task Order

The following task order was attached to the e-mail in Figure 1. (Not all fields are shown in this example.)

Talawanda School District

Task/Work Order

Order No.: EHS - 1957-12520

Requestor Name: Jim Rowan

Telephone No.:

E-mail Address: rowanj@talawanda.org

Work Description - OSHA 300A - post report at all sites

It is time to post the OSHA 300A report at each site.

The OSHA 300A is used to summarize for each calendar year the work-related injuries and illnesses included on the OSHA 300 log. At the end of each year, the OSHA 300A must be posted from February 1 through April 30 in a visible location at each site so that employees are aware of the injuries and illnesses occurring in their workplace.

Steps to complete this task:

1. Go to the district Web site, click on Health & Safety.
2. Click on Report an Employee Accident.
3. Click on View OSHA 300A.
4. Select a site and the most recently completed calendar year, then click on Submit.
5. Print the OSHA 300A report for the selected site.
6. Repeat steps 3 & 4 for every site.
7. Have an administrator sign all of the reports and send the appropriate 300A report to each school/site in the district.

Schedule

Submitted: 11-24-2003

Issued: 01-15-2004

Target Completion: 01-29-2004

It is very important that you record completing this work!

ACCIDENT REPORTING AND MANAGEMENT

On-line accident and blood exposure reporting facilitates fast, accurate incident reporting, while identifying all of the information needed to initiate an investigation and create required reports. Investigation auto-start enables faster, better crisis management by automatically notifying all appropriate people for feedback and signoffs.

Analysis and trend reporting provide valuable insight to drive the improvement of the district injury and illness prevention program. Central repository of all accident and injury information can be sorted by employee, job/trade, causes, and more.

The system provides automatic completion of the workers' compensation insurance form and notifies key internal and external people via e-mail. Automatic completion of OSHA 300 reports eliminates the administrative and clerical effort of creating and managing the OSHA 300 log and OSHA 300A summary reports.

EMPLOYEE REPORTING OF SAFETY HAZARDS

Reporting safety hazards and unsafe work practices has never been easier. Staff, students, and community members can all report safety hazards in the district on-line. Multiple

contacts at both the school and central administration levels can be assigned so employees know to whom to address their concerns. The system saves time and minimizes confusion by providing a standardized way of reporting, filtering, and prioritizing physical hazards and unsafe employee work practices and follow-up activities such as repairs, special training, etc. This highly flexible capability is designed to support efficient work management and communication of status within individual schools and across the district.

The central administration has multiple options for dealing with each hazard and for tracking and documenting the response actions. The system automatically notifies the employee of the status of follow-up actions and provides access to historical information that can be sorted by key parameters.

ACCESS TO MSDS

Material safety data sheets (MSDS) are accessible 24 hours a day, seven days a week on-line, by phone/fax, and via telephone conversation with knowledgeable chemical safety specialists. This combination service enhances employee access and understanding while eliminating the requirement for paper files or binders.

MODEL SAFETY AND REGULATORY COMPLIANCE PROGRAMS

PublicSchoolWORKS includes model written plans and procedures developed specifically for a public school district. These plans can be used as-is or customized. They are fully coordinated with implementation, training, and compliance tasks, so the district is doing what the written plan says it's doing.

The plans are written in a standard, easy-to-read format to reduce the implementation effort while supporting best practices and meeting regulatory requirements.

CENTRAL REPOSITORY FOR SAFETY PROGRAMS AND PROCEDURES

PublicSchoolWORKS provides a district with an on-line repository for all of its safety-related program documents. This gives district personnel, parents, emergency personnel, and the general public ready access to district-specific information and a master library of model documents anywhere, anytime. The repository includes:

- written program plans;
- general safety procedures;
- emergency safety procedures;
- safety forms, tags and labels; and
- safety articles and information.

All on-line documents are easily managed by the district using simple but powerful document management software tools.

SAFETY FORMS, TAGS, AND LABELS

More than 50 on-line forms, tags, and labels can be automatically attached to tasks included in the compliance manager. Model forms are developed specifically for a public school district, including inspection forms (e.g., playgrounds, bleachers), safety notices, and more. Various forms, such as inspections, focus on practical application without straining limited staff resources.

SAFETY ARTICLES AND INFORMATION

On-line access to regulations and related articles makes it easy to research and clarify regulation details and better understand their intent and practical application. Key articles address some of the common issues faced by school districts. On-line access also provides an easy way to convey information to the greater school community.

HOTLINE/CALL CENTER

A Call Center dramatically extends the capabilities and value of PublicSchoolWORKS by providing 24/7 telephone access to trained experts who can quickly answer critical safety or compliance questions, fax Material Safety Data Sheets, or provide information on one or more MSDSs. The Call Center can even be used to report the completion of tasks. A single, easy to remember, toll-free phone number can be the primary interface to critical information and common PublicSchoolWORKS functions for people

across the district, regardless of their access to a computer or the Internet.

EASY ACCESS ANYWHERE, ANY TIME

PublicSchoolWORKS provides fast, easy access to important information and critical functions from the office or from home, via either the Internet or the telephone, 24 hours a day. But it is much more than just a computer system—it's also access to trained safety experts who can provide answers to questions and help explain complex information in practical terms.

On-line access provides immediate availability of all system functions and resources to authorized staff members and contractors with access to the Internet at work or at home. The ability to link into selected portions of PublicSchoolWORKS from the district's Web site provides an easy and highly professional means of providing written plans, procedures, and other information to the public. And because no software needs to be installed or managed by the school or district, there is no requirement for special hardware or IT support.

Benefits of a Technology Solution

PublicSchoolWORKS uses latest technologies and the Internet to integrate and establish an intelligent and sustainable solution framework, broadening and strengthening the safety and regulatory compliance management capabilities of public school districts. Specific benefits of such a system include:

No need to add new staff or affect current staff. It is like having a safety and compliance staff working for the district. No need to hire additional staff to implement a comprehensive safety and regulatory compliance program.

Better use of current staff. Not only does the system provide the resources to help districts comply with regulations, but existing staff members don't have to spend time doing things they may be doing now, like filling out OSHA reports.

A plan of action. PublicSchoolWORKS includes specific tasks to sustain a comprehensive safety and regulatory compliance program.

Peace of mind. The district safety and compliance program is on cruise control. Employees and contract service providers are told what to do and when.

Reduced costs of operation. PublicSchoolWORKS is an effective means to implement, track, and sustain a comprehensive safety and regulatory compliance program over time. The effect of such a program will be fewer accidents and injuries, reduced insurance premiums, and lower claims costs.

Minimal cost of prevention. The program can be implemented quickly and at a fraction of the cost of in-house staff or outside contractors.

Relief from training headaches. Employees have unlimited access to a complete curriculum of effective on-line safety training courses they can take at work or at home.

The time efficient and content effective courses increase training effectiveness and efficiency.

Minimized liability and litigation. With a complete regulatory compliance record, the district will be in a position to demonstrate to its board, insurance carrier, OSHA, legal entities, and the public that it has taken a proactive position relating to safety and regulatory compliance—and the documentation is there to prove it.

Minimized claims. Districts implement both a comprehensive injury prevention program and an effective injury notification and management system. Thus, claims are either prevented or kept in check.

Practical, even for employees who don't like computers. Many of the features of PublicSchoolWORKS are available through the telephone: talk to safety specialists, get an MSDS, close a task/work order, and more.

Conclusion

At a time when budgets are tight and resources are limited, take a look at how your safety and regulatory compliance programs are implemented. Determine what things (if any) are needed to provide a more efficient and accountable system. Providing public safety is our responsibility and we all must work harder to maintain/restore public confidence in the educational community. ■

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Steve Temming is founder and president of ProSum Technologies, Inc. (PublicSchoolWORKS), Cincinnati, Ohio.

PRESIDENT'S MESSAGE (continued from page 2)

elected Boards of Directors. Serious care and diligence must be taken by all voters to assure ASBO's Board takes on the major issues of the Association and of the profession. Every Board meeting, every topic, every decision should be for the benefit of each individual ASBO member.

A professional association exists for the benefit of its members. Members should, therefore, not only have the power but the responsibility to elect only those who will serve their common interests. All eligible voters must respond to this call to arms to make their voice heard in selecting leaders dedicated to Association governance, because in the long run the collective personality of the Board must be one of service to the members, the Association, and the profession. Voting members must hold high standards for board candidates—men and women who will serve and lead ASBO successfully into the future—past our centennial in 2010 and well on our way to our sesquicentennial in 2060. ■

Note: Carlos Patino, pictured on page 35 of the January 2004 *School Business Affairs* magazine, is from Argentina.

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