

# Analyzing Overtime Expenditures

Identifying trends, departmental narratives, and stop gaps

# A Texas based school district is on track to spend \$2-3 million more in overtime expenditures

## Background

- ❑ I participated in a data strategy engagement with a Texas based school district to assist with identifying excessive overtime expenditures and action steps to alleviate. Three primary areas of focus:

### Analyze OT Data

- ❑ Identify expenditure trends by YOY, department, and employee
- ❑ Built Power BI dashboards for optimal data reporting and actionable insights

### Identify A Narrative

- ❑ Conducted detailed departmental leadership interviews to generate a narrative that supports excessive OT expenditures

### Evaluate Next Steps

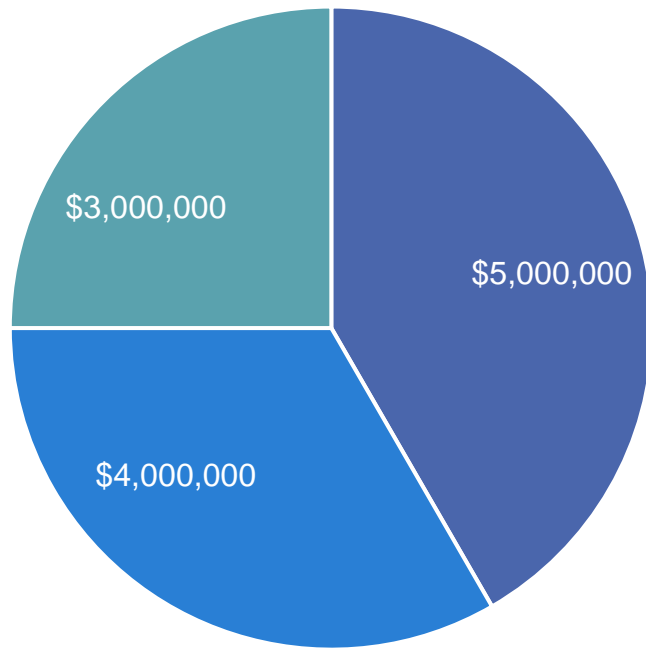
- ❑ Dispatched a detailed report of OT Data, time clock analysis, and expenditure dashboards to formulate action steps to curb OT expenditures

The following slides are a snapshot of the project focusing on the transportation department

# Overtime At A Glance

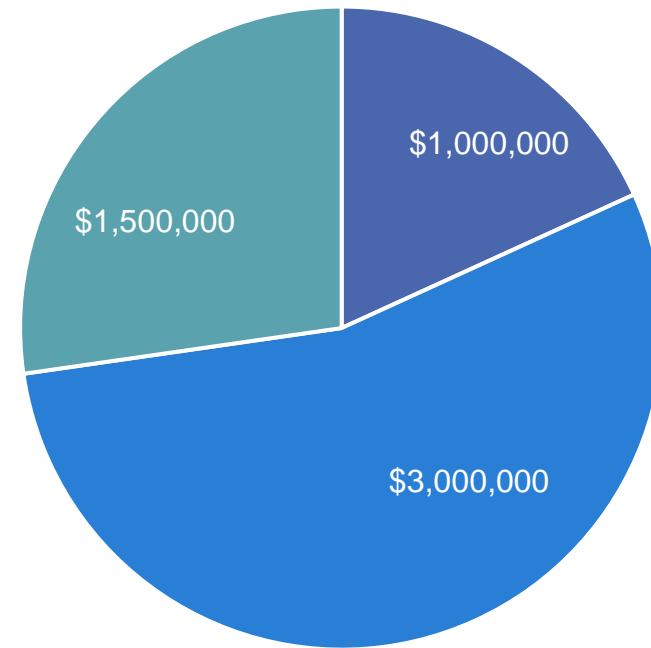
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District OT 2024



■ Other Depts ■ Transportation ■ FMO

District OT 2025 (through Dec)

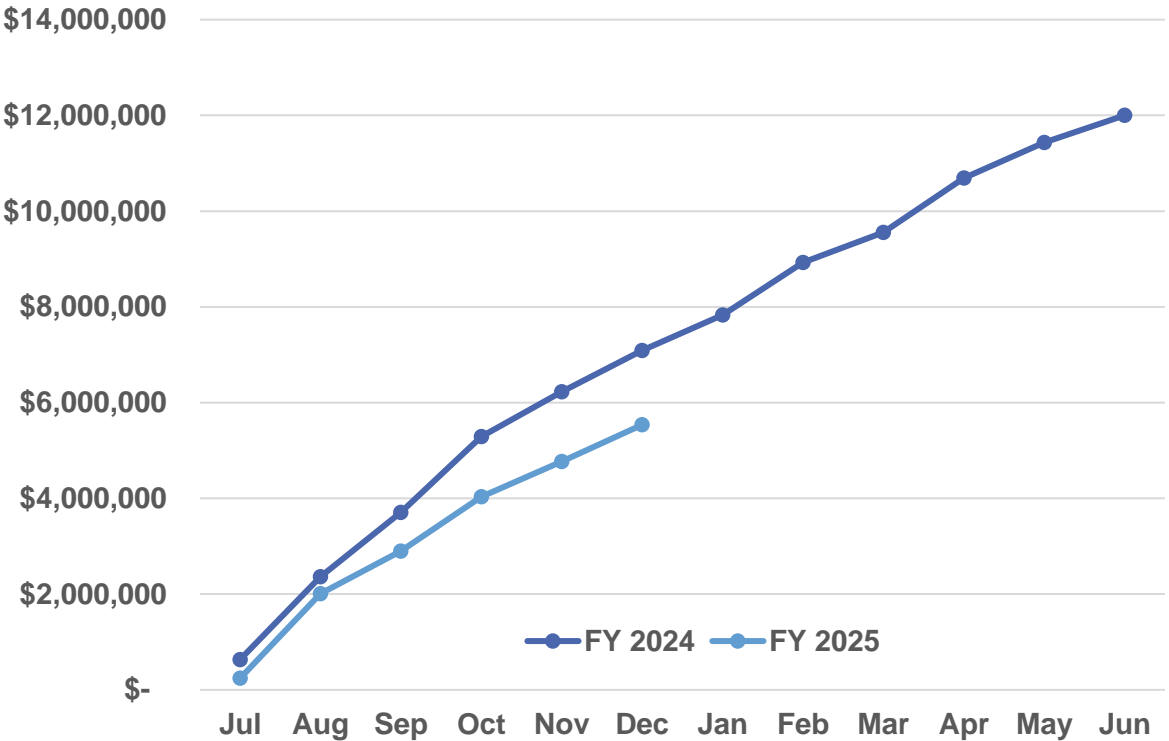


■ Other Depts ■ Transportation ■ FMO

# OT Summary (District Wide)

Month	<sup>1</sup> FY2024	Month	<sup>1</sup> FY2025
Jul	\$ 600,000	Jul	\$ 200,000
Aug	\$ 2,000,000	Aug	\$ 2,000,000
Sept	\$ 3,000,000	Sept	\$ 2,000,000
Oct	\$ 5,000,000	Oct	\$ 4,000,000
Nov	\$ 6,000,000	Nov	\$ 5,000,000
Dec	\$ 7,000,000	Dec	
Jan	\$ 7,000,000	Jan	
Feb	\$ 8,000,000	Feb	
Mar	\$ 9,000,000	Mar	
Apr	\$ 10,000,000	Apr	
May	\$ 11,000,000	May	
Jun	\$ 12,000,000	Jun	

Overtime Tracking FY2024 and FY2025

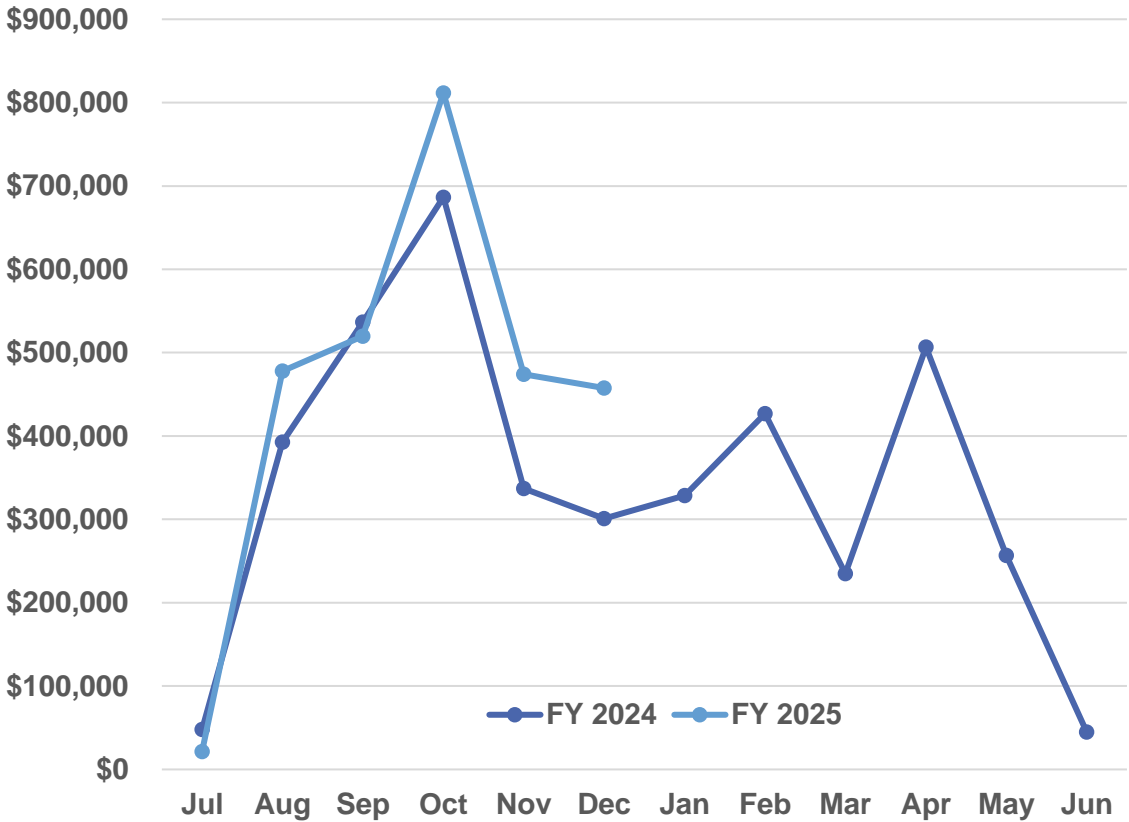


<sup>1</sup>The figures above are the cumulative monthly OT expenditures

# Transportation Overtime Expenditure by Month

Month	Fiscal Year 2024	Fiscal Year 2025
July	\$ 48,000	\$ 21,000
Aug	\$ 400,000	\$ 470,000
Sept	\$ 500,000	\$ 500,000
Oct	\$ 680,000	\$ 800,000
Nov	\$ 300,000	\$ 400,000
Dec	\$ 300,000	\$ 400,000
Jan	\$ 328,000	
Feb	\$ 420,000	
Mar	\$ 200,000	
April	\$ 500,000	
May	\$ 250,000	
June	\$ 44,000	
Total	\$ ~4,000,000	\$ ~2,000,000

Transportation FY2024 and FY2025 Overtime



# Understanding Transportation Overtime Expenditures July – Dec 2024

Task	Descriptive Response	Issues/Dependencies	Status
What are the root causes of overtime?	Field trips, covering route for drivers who are out, accident investigations, traffic, special assignments, weekend staffing	Planned vs. "spur of the moment"	Ongoing. Kids must get to school and field trips will be taken
Is the department experiencing a financial impact from overtime allotment?	Yes. OT accounts are running in the negative.	Accounts are over budget	<b>Trending to be 2-3 million over budget</b>
Are there state or federal concerns aligned to active bus driving hours?	No, school bus drivers are not under DOT regulations.	Does the school district need to enact their own safety standard?	EOY district decision
Are there any seasonal/emergency adjustments for overtime?	First semester has the most field trips due to football, etc.	Scheduling trips and having enough drivers	Nearing the end of the first semester fieldtrips typically decline, but pick back up in spring, will OT reflect this trend?
Is there an outstanding budget for overtime?	Not specifically, overall budget was cut by 25%, many positions were eliminated	How can we accommodate the need with less employees?	There is a need to work with the finance dept to best understand our budget
Is there a shortage of employees	At times there is a shortage, fewer people are employed, same workload exist	<b>Not all drivers want to drive field trips</b>	<b>Field trip positions have been established and posted for hire.</b>
What time of day is overtime taking place? Type of events?	Day, evening, weekends	<b>Driver has already met their guarantee of six hours. Field trips last 4-5 hours.</b>	Transportation is considering options of reducing wait times verses drive times
Has there been an increase in workload or demand?	<b>Department does approximately 10,000 field trips per year</b>	Field trips include sporting events. We need to evaluate the cost of contracting bus drivers outside of district for a % of field trips	This issue will rollover in years following

# Areas To Deep Dive Into

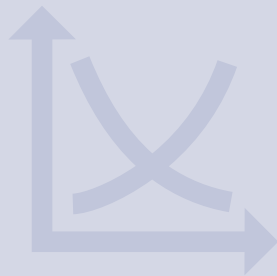
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How are we moving forward to cap additional OT from bus drivers?



What is the status of contracting bus drivers to assist with field trips?



How can we anticipate in future school years the estimated 10K fieldtrip load?



A TCP (time clock plus) analysis will align to the most “hot spot” hours of OT



If there is evidence of “stealing time”, what actions do we need to take to confirm?



Should we consider making changes to bus driver capped OT hours for 24-25 school year